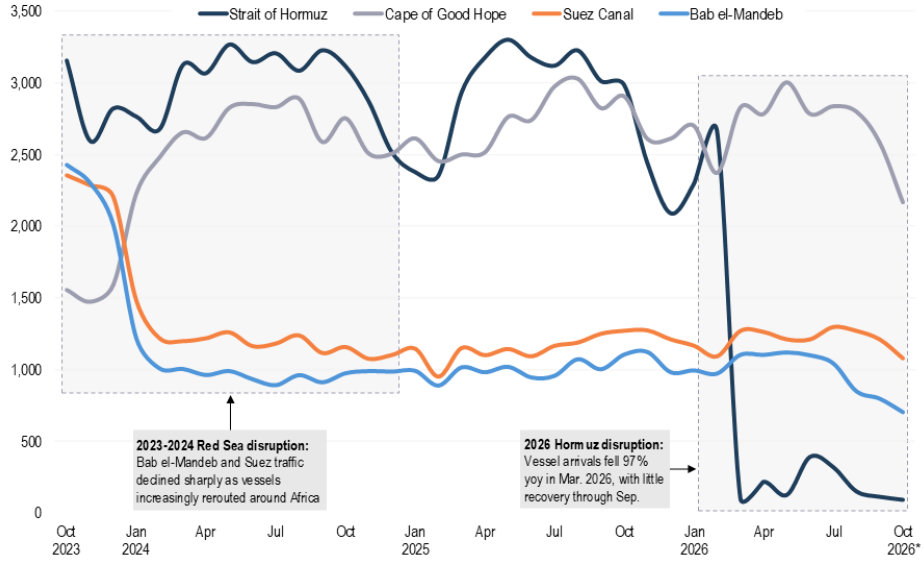
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Global Shipping Routes Are Being Redrawn as Trade Adapts to Prolonged Disruptions

Traffic through major maritime chokepoints remains severely disrupted, while elevated shipping volumes around the Cape of Good Hope reflect a sustained shift in global trade routes

Global Shipping Routes: Monthly Vessel Arrivals, Oct. 2023-Oct. 2026*



The New Geography of Global Shipping

−97% yoy **Strait of Hormuz** Mar. 2026 traffic collapse, with arrivals remaining low through Sep.	**+87%** **Cape of Good Hope** vessel arrivals in Jan-Sep. 2026 versus same period in 2023
−55% **Bab el-Mandeb** vessel arrivals in Jan.-Sep. 2026 versus 2023 (prolonged Red Sea disruption)	**−45%** **Suez Canal** vessel arrivals in Jan.-Sep. 2026 versus 2023 (continued weakness of Asia-Europe shortcut)

What this means for global business:

- China-Europe trade: Rerouting around Africa can add approximately 10 days to shipping journeys, raising transport costs and delaying deliveries
- China's energy security: Disruptions in the Strait of Hormuz threaten a major route for China's crude oil imports from the Middle East
- Global supply chains: Longer voyages tie up shipping capacity and increase inventory requirements, raising costs for manufacturers, retailers and importers

Note: Oct. 2026 only extends to the 25th of the month. Source: IMF PortWatch, ANDAMAN PARTNERS Analysis

Global shipping is being reshaped, but the story is not simply one of disruption. It is also about how international trade adapts when established routes become unreliable.

Since late 2023, shipping companies have increasingly diverted vessels away from the Red Sea and Suez Canal, sending them on longer journeys around Africa. In the first nine months of 2026, vessel arrivals at the Cape of Good Hope were 87% higher than in the same period in 2023, while traffic through Bab el-Mandeb and the Suez Canal was down 55% and 45%, respectively. A further shock came in March 2026, when vessel arrivals through the Strait of Hormuz collapsed by 97% year-on-year, with little recovery through September.

These changes matter far beyond the shipping industry. For Chinese exporters serving Europe, longer routes around Africa can add approximately 10 days to delivery times, raising transport costs and forcing businesses to plan further ahead.

Disruptions in the Strait of Hormuz present a different challenge, threatening a crucial route for China's crude oil imports from the Middle East. Across the global economy, longer voyages tie up shipping capacity, complicate inventory management and increase costs for manufacturers, retailers and consumers. Yet the continued movement of goods along alternative routes also demonstrates the adaptability of global trade.

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The emerging picture is not one of globalisation coming to a halt, but of a trading system adjusting to new constraints. For international businesses, understanding where goods move, how long they take to arrive and what they cost to transport is becoming as important as understanding where they are produced.

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