

Strait of Hormuz fears remain as ceasefire wobbles

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by [Nick Savvides](#), Europe correspondent



Credit: NASA - public domain via Wikimedia.

President Donald Trump used expletives in exasperation at both Israel and Iran as hours after a ceasefire was declared both sides were again apparently aiming missiles and bombs at each other.

Reserving much of his ire for the [US](#) ally Trump said that when he announced the ceasefire Israel had “dropped the biggest load of bombs that I’ve seen,” immediately after the announcement, but before the deadline for the ceasefire, “I’m not happy with Israel.”

Such fragility in the ceasefire only serves to cause further confusion and uncertainty in global markets and by extension through to the supply chains and the maritime sector including the container shipping sector.

If this truce cannot be sustained, and it looks extremely fragile at this time, the expectation that Iran may again threaten to block the Straits of Hormuz could have major consequences for the maritime sector and for the region.

MDS Transmodal analyst Antonella Teodoro the initial shock of the Israel – Iran conflict would be greater to shipping and the supply chain if it hadn’t been preceded by nearly two years of geopolitical strife since the initial Palestinian attacks in October 2023.

“Vessel operators are getting used to this new reality,” said Teodoro who accepts that the blocking of the Straits of Hormuz would be a major blow to oil and gas operators, but

container lines may just decide that they “don’t want the disruption and uncertainty” and that would be a problem for the region.

Total container vessel capacity passing through the Straits of Hormuz is 3.2 million teu, according to Linerlytica data, with much of that freight transhipped at the [UAE](#) port of [Jebel Ali](#).

“The position of Jebel Ali as the region’s primary transshipment and logistics hub would come under significant pressure. With both Hormuz and the Red Sea compromised, its connectivity to Asia, Africa, and Europe would deteriorate - raising questions about the port’s resilience and long-term role,” said Teodoro.

It is difficult to see how Red Sea ports such as Jeddah, Aqaba, and Damietta, which were an alternative to the Arabian Gulf could act as alternative gateways as they had done in the past, given the heightened tension in the Red Sea and the continued diversion of ships around the Cape.

In the long term, Teodoro expects: “This overlapping chokepoint crisis would likely accelerate investment in overland connectivity, such as the Gulf Railway, inland distribution networks, and multimodal corridors linking Gulf states to the Levant, Turkey and even Central Asia. However, these long-term solutions will not resolve the acute short-term supply chain disruptions.”

If the disruption were to be prolonged mainline container services to the Gulf would be suspended or rerouted. It is possible that may attempt to continue operations using feeder services and alternative hubs, but even these services would likely be affected by the constraints of the conflict.

“The headline risk remains oil and gas, the deeper vulnerability is the region’s dependence on a narrow set of maritime corridors for its entire economic model,” explained Teodoro.

Disruption of both the Straits and Red Sea trades would “isolate the Arabian Gulf from global container trade”, she added.

In the long-term Teodoro expects this scenario would “expose the fragility of Gulf port-centric supply chains and could prompt a fundamental reassessment of logistics strategies, diversification of routes and the geopolitical risks embedded in maritime trade.”