

WEEKLY REPORT · 2026-W25

Maritime Logistics & Infrastructure

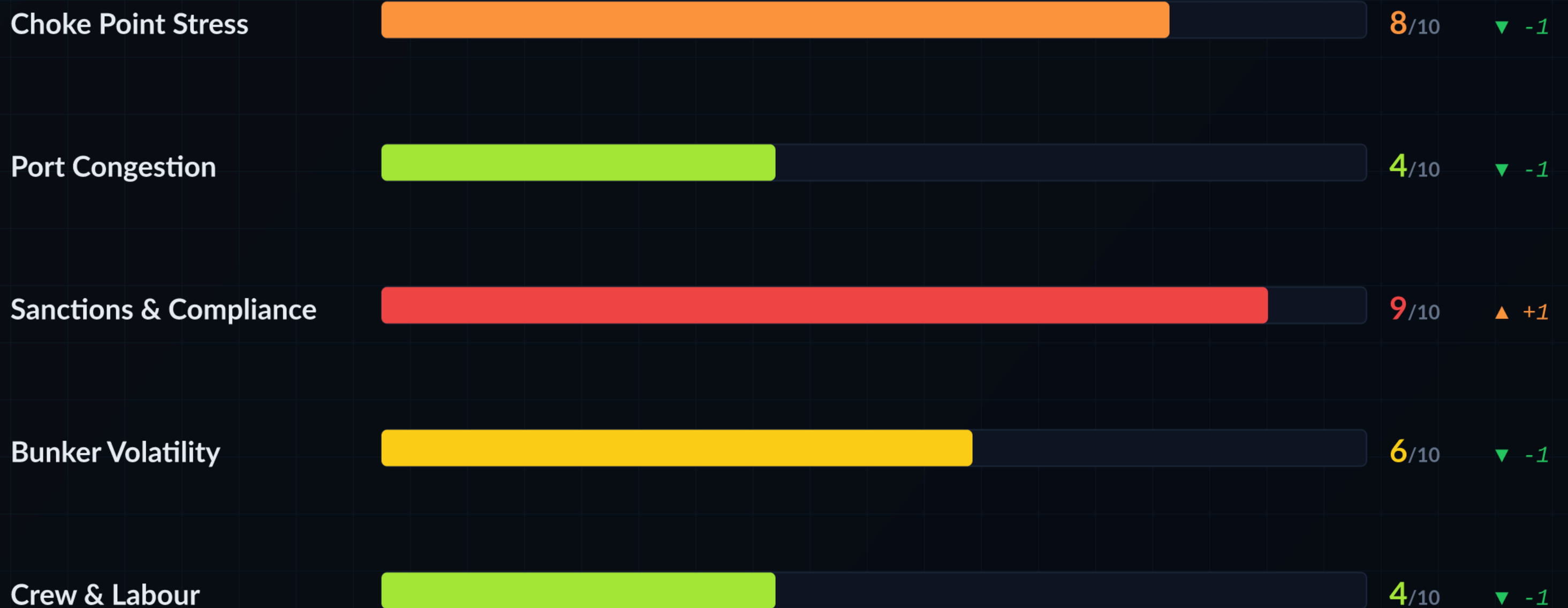
Weekly risk snapshot · 5 axes · 5 verticals



WEEK-OVER-WEEK

▼ -6 pts WoW

FIVE-AXIS HEATMAP



SCAN INSIDE

5 industry verticals · disruption events · 60–90 day outlook



INDUSTRY VERTICAL · 1 / 5

Tanker Markets

SCORE

9 / 10

LABEL

CRITICAL

WEEK-OVER-WEEK

no change

COMMERCIAL BRIEF

VLCC and crude tanker rates experienced significant volatility during the Hormuz closure, with the world's largest tanker operator (Mitsui OSK Lines) publicly warning that comfortable transit will take weeks to resume. War-risk premiums remain elevated in London markets. Suez Canal oil tanker traffic rose 28% as vessels rerouted. Shadow-fleet LNG tankers face new UK and EU designation, constraining available tonnage for Russian cargo

OPERATIONAL SIGNALS

- VLCC rates defied gravity during Hormuz closure; spot premiums now easing but war-risk insurance floor persists.
- Mitsui OSK Lines CEO: full Hormuz transit normalization still weeks away despite US-Iran MoU.
- UK sanctions 70 vessels including LNG tankers in shadow fleet — first G7 designation of Russian LNG carriers.
- Suez Canal oil tanker northbound volumes +28% as rerouting diversion partially unwinds.

HEADLINE THIS CYCLE

Peace deal won't quickly unwind London's Hormuz war risk premium - Insurance Business

news.google.com



INDUSTRY VERTICAL · 2 / 5

Dry Bulk

SCORE

5 / 10

LABEL

ELEVATED

WEEK-OVER-WEEK

no change

COMMERCIAL BRIEF

Dry-bulk operators with Gulf-origin or Gulf-destination voyages face residual route uncertainty as Hormuz normalizes over weeks rather than days. Persian Gulf fertilizer and grain export flows that were constrained during the closure are positioned to resume, but shipowners remain cautious pending clearer transit safety signals. Shadow-fleet sanctions carry limited direct exposure for mainstream dry-bulk operators, though flag-state

OPERATIONAL SIGNALS

- Gulf-origin bulk commodity flows (fertilizer, petrochemicals) disrupted during closure; gradual resumption expected over coming
- Rerouting via Cape of Good Hope added significant voyage days and bunker cost for affected bulk trades.
- Shadow-fleet sanctions primarily target tanker and LNG tonnage; limited direct dry-bulk impact this cycle.

HEADLINE THIS CYCLE

[Hormuz Reopening Stirs Debate Over How Long Until Normal Shipping Returns - Bloomberg](#)

[news.google.com](#)



INDUSTRY VERTICAL · 3/5

Container Shipping

SCORE

7 /10

LABEL

HIGH

WEEK-OVER-WEEK

no change

COMMERCIAL BRIEF

Container freight rates are accelerating earlier than seasonal norms, driven by front-loading demand ahead of Hormuz uncertainty and broader supply-chain risk repositioning. Schedule reliability on Asia–Europe and Asia–Middle East lanes remains under pressure while Hormuz transit confidence rebuilds. Carriers are managing blank sailings and capacity allocation carefully, with the rate surge creating short-term revenue upside but complicating shipper

OPERATIONAL SIGNALS

- Container freight rates surging six weeks ahead of typical seasonal uplift — headline 53.
- Asia–Middle East and Asia–Europe itineraries subject to extended voyage times pending Hormuz normalization.
- Shipper front-loading behavior amplifying demand-side rate pressure beyond seasonal baseline.
- Alliance schedule reliability at risk while carriers assess Hormuz transit safety protocols.

HEADLINE THIS CYCLE

[Container Freight Rates Surge Six Weeks Early - \[???](#)

news.google.com



INDUSTRY VERTICAL · 4/5

Offshore & Energy Services

SCORE

5 /10

LABEL

ELEVATED

WEEK-OVER-WEEK

▼ -1 *Wow*

COMMERCIAL BRIEF

Bourbon has secured a multi-month subsea services contract on Ghana's Jubilee field, deploying the MPSV Bourbon Evolution 802 – a positive demand signal for OSV operators in West Africa. AD Ports Group and Dajin Heavy Industry signed an MoU on offshore wind supply-chain and port infrastructure cooperation. The Dutch government has lifted tender price ceilings for two 1 GW offshore wind sites, signalling improved project economics. A UK developer

OPERATIONAL SIGNALS

- Bourbon wins Jubilee field subsea contract offshore Ghana – positive OSV utilization signal for West Africa.
- AD Ports Group / Dajin Heavy MoU targets offshore wind maritime logistics and port infrastructure.
- Dutch government removes price ceilings on two 1 GW offshore wind tenders – improving developer economics.
- UK 1.5 GW offshore wind developer extension request signals permitting / financing schedule risk.

HEADLINE THIS CYCLE

Bourbon Secures Subsea Services Contract on Ghana's Jubilee Field

marinelink.com



INDUSTRY VERTICAL · 5/5

Yacht & Leisure

SCORE

3/10

LABEL

GUARDED

WEEK-OVER-WEEK

▼ -2 *Wow*

COMMERCIAL BRIEF

No material direct commercial disruption signals for the yacht and leisure segment appear in this cycle's headlines. Residual war-risk conditions in the Persian Gulf and Hormuz corridor represent a routing constraint for superyachts and private vessels transiting between the Mediterranean and Indian Ocean. London insurance market's persistent war-risk premium applies to leisure-class hulls as well as commercial vessels operating in

OPERATIONAL SIGNALS

- Hormuz war-risk premium maintained by London market — applies to yacht and leisure hull cover for Gulf-region transits.
- No material cruise or marina operational disruption signals in current headline set.

HEADLINE THIS CYCLE

[Peace deal won't quickly unwind London's Hormuz war risk premium - Insurance Business](#)

[news.google.com](#)



ACTIVE DISRUPTION EVENTS

What we're tracking

Named events visible in this cycle's headlines, classified by vertical.

No named disruption events reported in this cycle.



FORWARD OUTLOOK · 60-90 DAYS

What we're watching

PROBABILISTIC FORECAST

Outlook pending next cycle.

THIS CYCLE

60 maritime headlines analysed

DEEP DIVE

Full live decomposition — 5 axes, 5 verticals,
warningofwar.com/maritime/