

Maritime Intelligence Operations Center

Intelligence Analysis

MARCH 26, 2026



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OMAN - EXECUTIVE INTELLIGENCE SUMMARY | OPERATION EPIC FURY, 26 March 2026

Iranian Strike Target - Despite Neutrality

- Iran struck Duqm port (1-3 March) and Salalah (11 March) with drone attacks despite Oman's mediator status
- Salalah suspended all terminal operations 11-16 March (5-day full shutdown); Duqm fuel storage hit and was temporarily suspended
- Joint War Committee reclassified all Omani waters as war-risk areas - insurance repricing now applies across the entire Omani coast
- Iran's targeting logic is clear: Salalah was the primary "exit ramp" from Hormuz closure - Iran moved to close it

Maritime Beneficiary - The 3,500%+ Signal

- Salalah is the only major container hub outside both the Strait of Hormuz and Bab el-Mandeb threat zones simultaneously - its geographic position is unique in the Indian Ocean
- Vessel diversions to Oman surged 3,500%+ in the week Hormuz effectively closed (week of 5 March)
- China-Gulf spot freight rates rose 72% in a single week; China-Salalah rates rose 28% independently - demand-pull, not Omani domestic demand
- Major carriers (Maersk, Hapag-Lloyd, CMA CGM, MSC) restructured global service rotations around Oman as the de facto Gulf-cargo transshipment hub

Bunkering Vacuum - Fujairah Replacement

- Fujairah, the world's second-largest bunkering hub, is functionally offline after repeated drone strikes; suppliers declared force majeure from early March
- Salalah, Sohar, and Duqm collectively absorb displaced marine fuel demand - distributed across three facilities, reducing Iran's targeting efficiency versus Fujairah's single mega-hub
- Every Asia-Europe vessel that previously bunkered at Fujairah now requires an Indian Ocean alternative - Oman is the only viable candidate on the correct routing arc

Going Forward

- Earlier today (March 26, 2026), 2 major messages were published - 1. Oman has solidified its position as a strategic partner for the European Union in light of escalating tensions in the Strait of Hormuz, which have significantly disrupted global energy markets. 2. Houthis Senior Official says that the Houthis are set and ready to launch a strike on vessels transiting the Red Sea. Since the Beginning of March, Oman has served as the primary point of vessels transiting East-west, especially now with the partnership with the EU. The Houthis' threat of strikes poses much more vulnerability on the Energy and Freight markets

Oman emerged as the primary alternative hub for commercial vessels following Operation Epic Fury for one simple geometric reason: it is the only country in the region whose major ports - Salalah, Sohar, and Duqm - sit entirely outside both active chokepoint threat zones simultaneously. With the Strait of Hormuz effectively closed by Iranian interdiction and the Bab el-Mandeb threatened by Houthi resumption, every other significant regional hub was either trapped inside the Gulf (Jebel Ali, Hamad, Shuwaikh) or exposed to Red Sea risk. Salalah in particular, as the 9th largest container port globally with pre-existing carrier slot agreements and deep-water infrastructure on the open Arabian Sea, offered mainline vessels an immediate, operationally credible discharge point from which Gulf-bound cargo could be forwarded via feeder vessels or overland truck corridors - without requiring the mother vessel to enter any threat zone. The simultaneous collapse of Fujairah as the world's second-largest bunkering hub, following repeated Iranian drone strikes, added a second driver: vessels on the Asia-Europe routing arc lost their primary refuelling stop, and Oman's coast became the only viable replacement on that lane. The result was not a planned contingency activation but a spontaneous industry convergence on the only deep-water, open-ocean, multi-function port complex that the conflict had not yet made inaccessible.

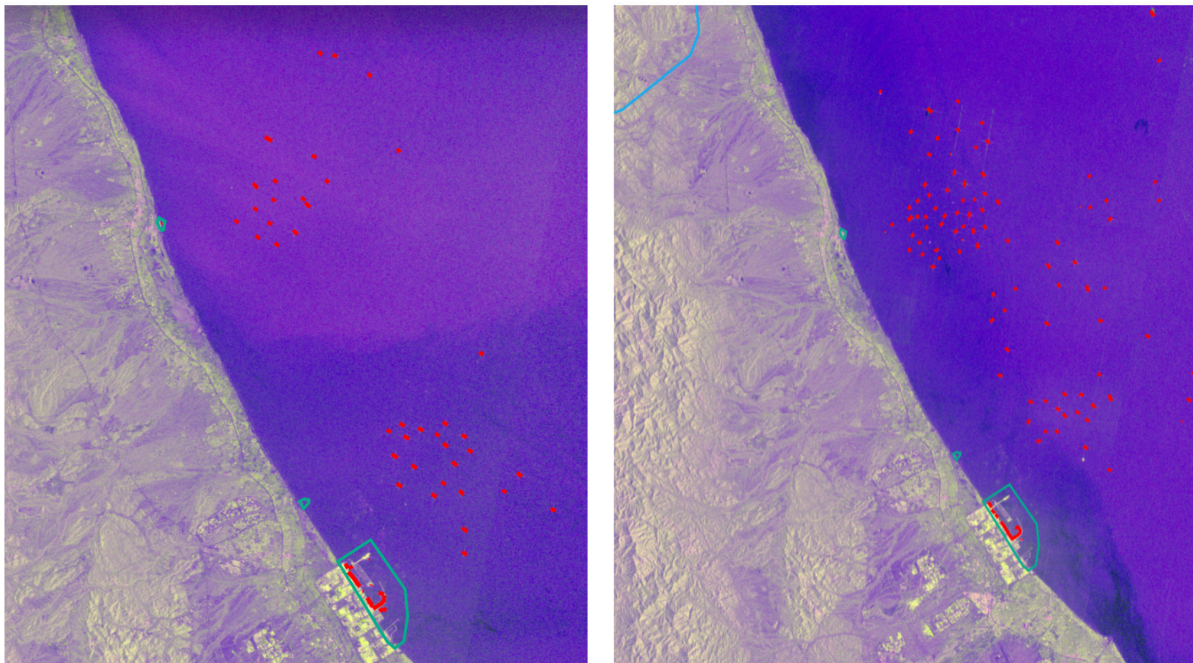


Figure - A cluster of vessels off the port of Sohar, Oman, shows nearly double the amount on March 26, 2026 (Right) than before the Epic Fury Operation (Left) - Dec 2025. Windward



1. THE BUNKERING VACUUM: FUJAIRAH'S COLLAPSE

Fujairah's strategic role as a bunkering hub emerged from the Iran–Iraq War in the 1980s, when the strait was mined, and tankers were targeted. The UAE later built the Habshan–Fujairah pipeline with a maximum capacity of around 2 million barrels per day to export oil should the Hormuz shuts down. The Fujairah Oil Industry Zone today holds almost 70 million barrels of oil product storage capacity across 15 major tank farms, making it the world's second-largest bunkering hub.

That capacity is now compromised. Fujairah is functionally offline as a bunkering hub after repeated drone strikes, sending bunker prices to historic highs and forcing suppliers into force majeure.

This creates a structural vacuum. Every vessel on the Asia-Europe route that previously bunkered at Fujairah now needs an alternative. Salalah's fuel infrastructure, while smaller and itself struck on March 11, positions it as the only credible Indian Ocean bunkering alternative that is:

- On the Asia-Europe route
- Outside the Hormuz exclusion zone
- Accessible without the Bab el-Mandeb transit

Sohar and Duqm also have bunkering facilities, meaning the entire Omani coast functions as a distributed replacement for Fujairah's single mega-hub.

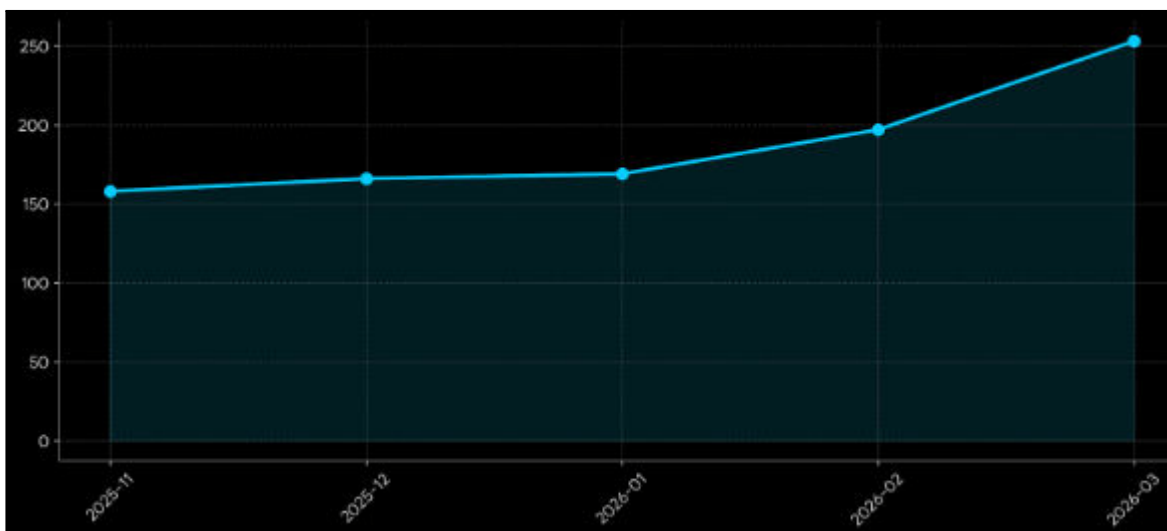


Figure - A spike in Ship-to-ship Operations (Bunkering & Servicing Classified) in March, Oman Exclusive Economic Zone. Windward



Figure - Cluster of Bunkering Ship-to-Ships off the Salalah Port before Operation Epic Fury (Left) and After (Right), Oman Exclusive Economic Zone. Windward

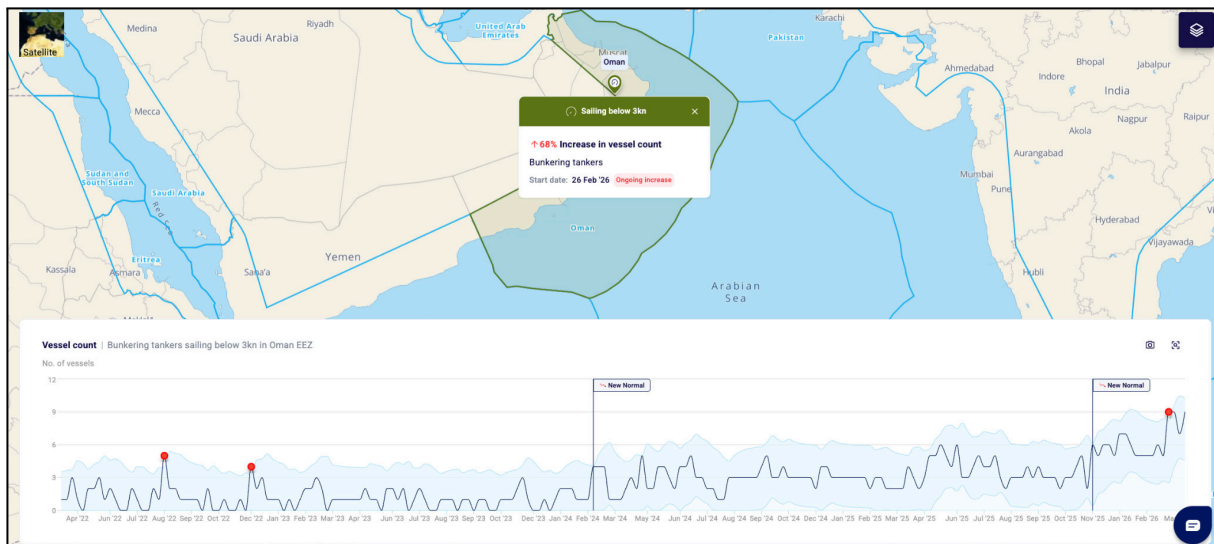


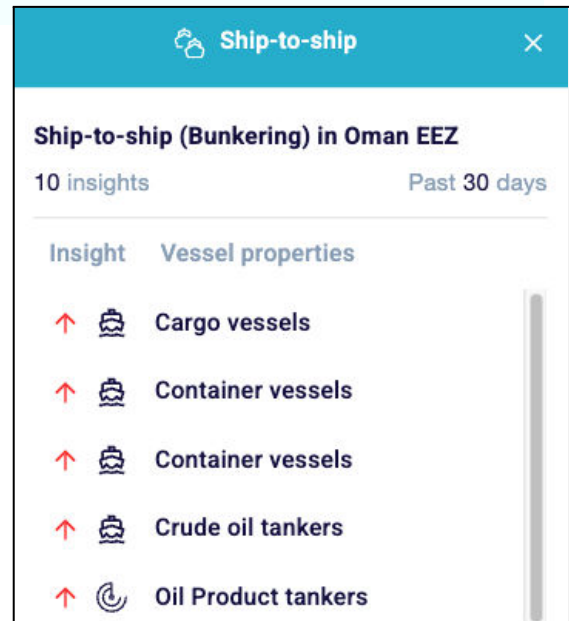
Figure - Windward Early Detection Anomaly shows an at least 5-year high in the number of bunkering tankers sailing at speeds below 3 knots in Omani waters. Windward

During the week of February 26 to March 5, 2026, there was a significant spike with 9 vessels observed, approximately 68% higher than the predicted value of 5 vessels, marking an all-time high for the series.

This elevated presence of bunkering tankers operating at low speeds in Omani waters indicates increased demand for fuel supply operations post the halt in Fujairah.



Figure - Windward Early Detection shows 5 Anomalies of increasing bunkering Ship-to-Ship Operations with Multiple Sub-classes in March. Windward



2. THE WET CARGO MARKET

Wet Cargo departing Oman in the past 12 Months is totalling in 597 Million Barrels. With an average of 1.5 Million Barrels exported per day. Since the beginning of Epic Fury, Oman's export volume has remained relatively balanced.

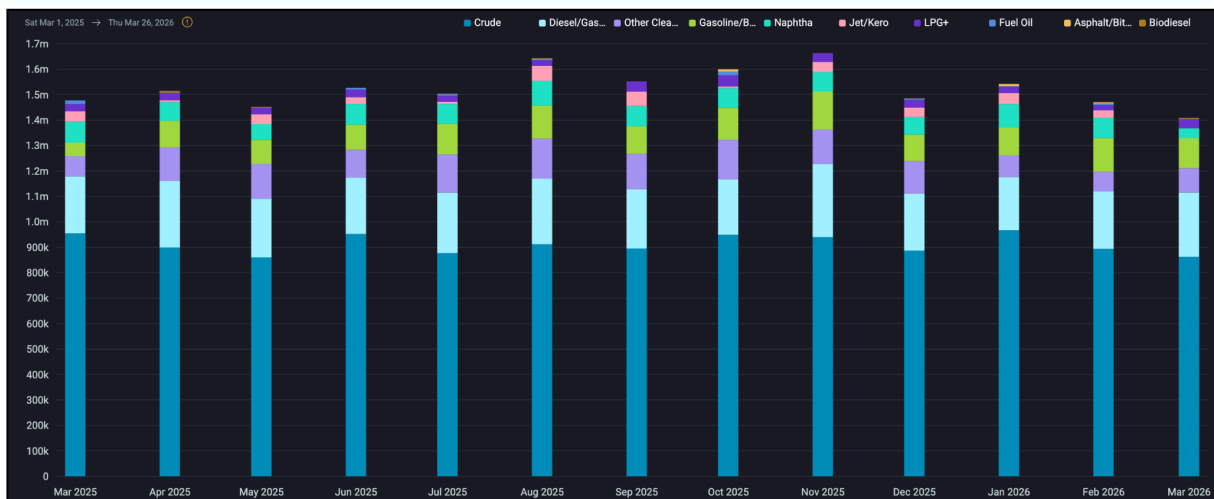


Figure - Omani Wet Cargo Export, 12-Month Period. Vortexa

Over the past 12 months, the top importer of the Omani cargo was China, followed by South Africa and India. In March, exports have slightly shifted to Pakistan, the UAE, India, Taiwan, and



China. Resulting in roughly 20% of its export diverted from countries such as South Korea, South Africa, and Singapore.

Name	Daily avg. quantity	
China	55.4%	780.6k
Pakistan	5.5%	76.9k
United Arab Emir	5.3%	75.3k
Taiwan	5.2%	73.2k
India	3.4%	48.5k

Figure - Omani Wet Cargo Top Destination, March 26. Vortexa

3. CONTAINERIZED FREIGHT - SALALAH PORT

- Only major container hub in the western Indian Ocean outside both the Strait of Hormuz and the Red Sea/Bab el-Mandeb
- Established overland truck routes to the UAE, Saudi Arabia, Qatar, Kuwait, and Bahrain - 4-5 day transits

The Rerouting Signal - Port of Destination Changes

- Carriers amended vessel manifests mid-voyage, replacing in-Gulf ports.

Exceptions analysis

- Week of 5 Mar (Hormuz closes, 28 Feb): 55 obs - +3,567% vs. 4-week AVG.
- Week of 12 Mar (post-attack): 68 obs
- Week of 19 Mar (post-attack): 71 obs

11 March Drone Strike

- Iranian drones struck fuel storage; all terminal operations are fully suspended.
- Resumed ~16 March - 5 days of complete shutdown.

Cost to Gulf Importers

- Shanghai-Gulf spot rates up 72% in a single week (week of 5 Mar), from ~\$1,327 to ~\$2,287/TEU
- China-Salalah spot rates rose 28% independently - demand-pull from Gulf cargo rerouted through Salalah, not Omani demand
- Middle East freight rates tripled from pre-conflict levels by mid-March



4. THE REROUTING MECHANISM: HOW CARRIERS ACTUALLY DID IT

Industry analysts projected that major container vessels with cargo inbound for the Gulf would discharge Gulf-bound cargo in Salalah, Khor Fakkan, Sohar, Duqm, and Colombo, from where it would be transported by smaller vessels willing to transit - directly analogous to what smaller carriers did during the Red Sea crisis for over two years.

The operational logic:

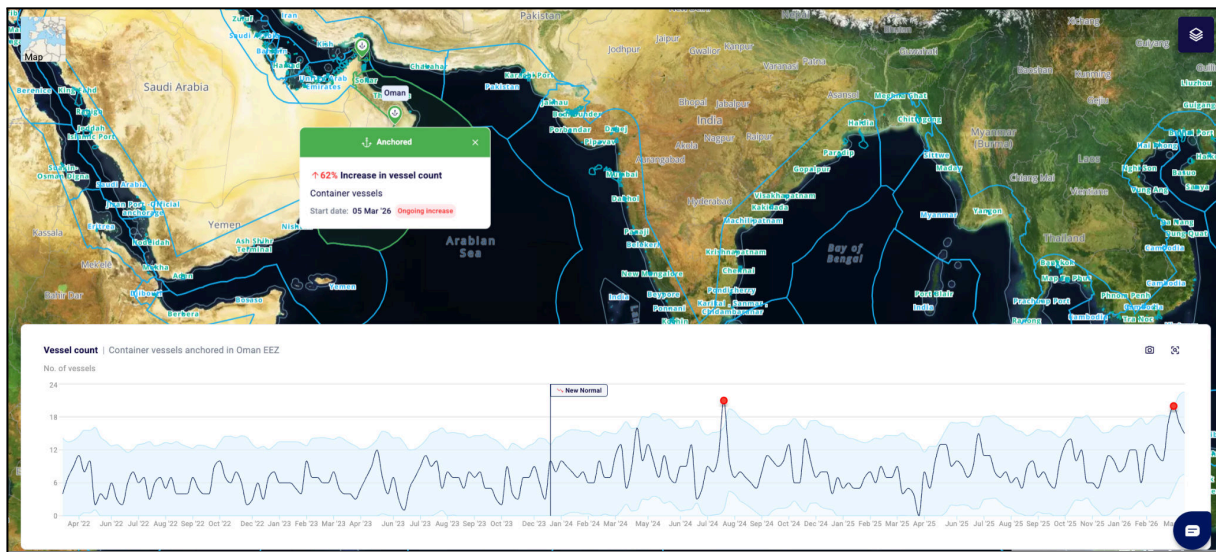
- Mainline vessels (ULCVs) divert to Salalah and offload Gulf-bound boxes
- Feeder vessels pick up and run smaller loads into the Gulf, accepting higher war-risk premiums for shorter, faster exposures
- Overland trucking takes up the slack for time-sensitive cargo

From Salalah, an in-transit overland route by truck connects to Jeddah in approximately 4–5 days. From Jeddah, onward movement by container vessel through the Suez Canal to Europe - or sea-air for more time-sensitive cargo - is possible, reducing overall transit time under current routing conditions.

On March 12, this was formalized: Dubai Customs published Customs Notice No. 04/2026, officially activating a Green Corridor between Dubai and the maritime ports of Oman. Goods arriving at Omani ports are cleared through Oman customs, transit overland to the Al Wajajah crossing, and enter the UAE through Hatta. The corridor operates in both directions. This is the institutionalization of your 3,500% signal - it moved from improvised workaround to codified procedure.

Qatar formally designated Salalah as its first-choice alternative: Qatar's Ministry of Transport advised shipping lines to route raw materials and consumer goods destined for Hamad Port via designated alternative ports in Oman, with Sohar, Salalah, and Duqm listed as the primary

Alternative and Fujairah and Khor Fakkan as secondary



The above Early Detection Anomaly shows the number of container vessels anchored in Omani waters, aggregated weekly over a four-year period. During the week of March 5-12, 2026, there was a notable spike with 20 vessels anchored, approximately 62% higher than the predicted value of 12 vessels, representing an all-time high for the series.

This increase in anchored container vessels in Omani waters could indicate port congestion at major Omani terminals or a temporary disruption in port operations, causing vessels to wait offshore. Given Oman's strategic location along the Arabian Sea and its role as a key maritime hub, such congestion could reflect broader regional shipping pressures or seasonal fluctuations in container traffic through the Indian Ocean.

Port analysts note that while major shipping lines already had agreements to call at Oman, pressure on capacity is mounting rapidly. Space is filling up on the quayside, with cargo being moved very quickly through the port - discharged for one or two days before evacuation to container freight stations. This could spell massive disruption for automotive supply chains.

5. MILITARY OPERATIONS

The only visible Military patrolling vessel within the Omani waters is an Indian Warship, deployed on March 12, 2026, visiting Oman for the first time. This is likely in addition to Multiple US forces operating in the area, without reporting positional data.



Source - Bloomberg

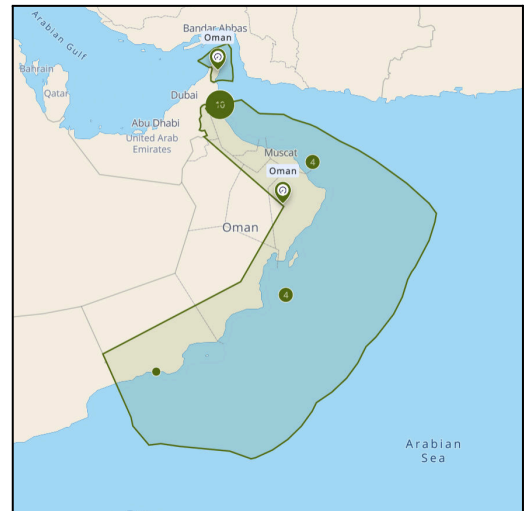


Figure - Indian Flagged Warship, Patrolling within Oman, March 2026. Windward

There are several more Military or Law vessels (Oman and UAE-flagged) patrolling in close range off the Omani coastline.



Figure - Military or Law Vessels, Patrolling within Oman, March 2026. Windward





Maintaining a persistent tactical advantage requires the transition from static monitoring to active orchestration. The Windward Maritime Intelligence Operations Center (MIOC) provides this bridge, functioning as an operational center that integrates multi-sensor intelligence - including EO, SAR, RF, HUMINT, and ADINT - with Agentic AI to Detect → Collect → Analyze threats and pre-operational indicators in real time. To move beyond data visualization and into proactive mission support, please reach out to your Windward point of contact. We are prepared to discuss aligning our Ongoing Intelligence Analysis or Ad-Hoc Forensic Deep Dives with your specific theater requirements.

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