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Alert No.

Tanger Med: Expected Traffic Increase Amid Geopolitical Tensions in the Middle East

STRATEGIC SIGNAL

Tanger Med anticipates an increase in port calls due to the rerouting of vessels away from the Cape of Good Hope. Major carriers such as Maersk, Hapag-Lloyd and CMA CGM are operating under significant pressure amid Middle East tensions. Demand, fueled by Houthi attacks since 2023, compounded by sanctions on Iran and the potential closure of the Strait of Hormuz, repositions the port as a major global transit hub. Its real scale remains entirely contingent on the evolution of an uncertain geopolitical situation.

HIGHLIGHTS

11,1 million containers handled in 2025, up 6.4% year-on-year. Tanger Med surpasses its Mediterranean competitors.

+10 à 14 days of additional transit time for vessels via the Cape of Good Hope.

Surcharges of \$1,500 to \$3,300 per standard container and up to \$4,000 for specialized equipment (war, conflict, diversion).

Connexions with over **180 global ports** - a first-class network for traffic rerouting.

STRATEGIC ANALYSIS - PROBABLE IMPACTS

A) Hub Reinforcement and Local Economy

- Direct and indirect jobs in logistics, maintenance and bunkering; increase in port fees and tax revenues for the TTA region.
- Export risk: rising surcharges potentially penalizing regional SMEs in textiles, agri-food and automotive.
- Tanger Med and free zones: leverage for new investments, with regional players now actively integrated.

B) Pressure on Capacity and Congestion

- Congestion risk confirmed at the current capacity level; no additional port call expected before mid-April 2026.
- An unmanaged influx could overflow onto the road and rail axes of the region, straining the logistics timelines of companies in adjacent industrial zones.

C) Opportunity for African Bunkering

- Extended voyages generate additional fuel demand. Middle East instability opens a structural window of opportunity for bunkering and ancillary services (crewing, maintenance, transshipment) at Tanger Med.

STRATEGIC ANALYSIS - POINTS OF VIGILANCE

- **Potential and unplanned increase:** the rise in port calls remains an anticipation, not a formal decision; its scale will depend on regional geopolitical developments.
- **Freight cost increases:** rerouting surcharges weigh on the supply chains and exports of regional operators, particularly in textiles, agri-food and automotive.
- **Decade-scale impact timeline:** the full effects on cargo flows will only materialize from mid-April 2026, leaving an adaptation window for port operators.
- **Territorial congestion risk:** an unmanaged influx could overflow onto the road and rail axes of the region, straining the logistics timelines of companies in adjacent industrial zones.
- **Signal reversibility:** any regional normalization could significantly reduce disruptions.

STRATEGIC RECOMMENDATIONS

SHORT TERM

- **Anticipate congestion:** strengthen port protocols with terminals and land carriers.
- **Flow monitoring:** adjust human and material resources to activity peaks.
- **Support the competitiveness of regional exporting companies** in freight cost rebalancing, by promoting freight cost sharing.
- **Capitalize on international visibility:** leverage the media effect of Tanger Med's announcement among current rerouting carriers, by highlighting reliability, connectivity and value-added services.

MEDIUM TERM

- **Strengthen Tanger Med's commercial positioning** via its reliability, connectivity and value-added services.
- **Develop bunkering and ancillary services** to diversify and consolidate regional revenues.
- **Clarify responsibilities** among actors in the free zones and concerned industrial zones.

LONG TERM

- **Coordinate with regional and national actors** to integrate this dynamic into the development strategies of free zones and industrial zones.
- **Resilience scenarios** in case of regional geopolitical normalization to avoid over-exposure to the cycle.
- **Sustainable logistics:** leverage local and low-carbon value chains as a regional differentiation argument.

Sources :

Reuters, « Morocco's Tanger Med port prepares for increased traffic amid Gulf war »