



TORANIS Strategic Brief 2026 – 02

Strategic Choke-points

Infrastructure Risk in a Fragmenting World

Executive Summary

- Global trade and energy flows depend heavily on a small number of strategic choke-points, many of which carry disproportionate volumes of global commerce.
- Approximately 12% of global trade transits the Suez Canal, while the Strait of Hormuz handles roughly 20% of global oil shipments and the Bab el-Mandeb corridor connects nearly 30% of global container traffic between Europe and Asia.
- Recent disruptions in the Red Sea and sabotage incidents targeting European energy infrastructure demonstrate the vulnerability of these corridors to geopolitical tensions, hybrid warfare, and maritime security threats.
- Organisations dependent on global supply chains face rising exposure to shipping delays, increased insurance costs, energy volatility, and infrastructure disruptions.

Context

Modern global trade remains highly concentrated in a limited number of maritime and infrastructure corridors. Key maritime choke-points such as the Strait of Hormuz, Bab el-Mandeb, the Suez Canal, and the Strait of Malacca collectively carry a substantial share of global oil shipments, container traffic, and raw materials. Roughly 30% of global container trade between Asia and Europe passes through the Suez Canal corridor, making disruptions there immediately visible in global logistics markets.



Recent incidents illustrate the scale of the risk. The 2021 Suez Canal blockage, caused by the grounding of the Ever Given container ship, halted an estimated \$9–10 billion in daily trade flows and disrupted more than 400 vessels. More recently, security threats in the Red Sea corridor forced several major shipping companies to reroute vessels around the Cape of Good Hope, adding 10–15 days to shipping times and increasing freight costs by up to 40% on some routes.

Strategic infrastructure vulnerabilities are not limited to traditional maritime choke-points. Critical infrastructure clusters in Europe and North America, including the Danish Straits in the Baltic Sea, the English Channel, the Strait of Gibraltar, the North Sea energy network, and major U.S. port complexes, represent key nodes for energy, trade, and digital connectivity. Incidents such as the Nord Stream pipeline sabotage in 2022 and repeated damage to submarine cables in the Baltic Sea highlight the growing exposure of Western infrastructure to sabotage and hybrid operations.

Global economic activity depends heavily on a limited number of transit corridors. Maritime choke-points such as the Strait of Hormuz, Bab el-Mandeb, the Suez Canal, and the Strait of Malacca collectively handle a substantial share of global trade and energy shipments. Roughly 20% of global oil trade transits the Strait of Hormuz, making it one of the most sensitive energy choke-points in the world.

Recent warnings from U.S. Central Command (CENTCOM) indicate that civilian port infrastructure along the Strait of Hormuz may increasingly be used to support Iranian naval operations, including activities linked to the Islamic Revolutionary Guard Corps Navy (IRGCN). Under international law, civilian infrastructure used for military purposes can lose its protected status, effectively turning commercial ports into legitimate military targets. This dynamic illustrates how quickly strategic choke-points can shift from commercial hubs to contested operational environments.

Key Developments

- **Maritime security risks:** Attacks on commercial vessels in the Red Sea corridor have disrupted one of the world's busiest shipping routes, forcing shipping companies to reroute vessels and increasing global freight costs.
- **Energy corridor vulnerability:** The Strait of Hormuz remains one of the most sensitive energy choke-points, carrying roughly one fifth of global oil trade, making any disruption immediately visible in energy markets.



- Infrastructure sabotage in Europe: The Nord Stream pipeline explosions and incidents involving submarine cables in the Baltic Sea have raised concerns regarding the security of European energy and communication infrastructure.
 - Digital choke-points: More than 95% of global internet and financial data traffic travels through submarine fiber-optic cables concentrated along specific routes, creating vulnerabilities to sabotage or accidental disruption.
 - Western logistics concentration: Major port complexes such as Los Angeles–Long Beach, which handle roughly 40% of U.S. containerised imports, represent critical nodes where labour disputes, cyber incidents, or infrastructure disruption could rapidly affect North American supply chains.
 - Civilian infrastructure becoming military targets when ports, shipping terminals, or logistics facilities are used for military operations, increasing risks to commercial shipping crews, port operators, and logistics companies.
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Operational Risks

- Shipping delays caused by re-routing around insecure maritime corridors.
- Increased freight costs and insurance premiums for vessels operating in conflict-affected areas.
- Volatility in energy markets linked to threats against oil and gas transit routes.
- Supply chain disruptions affecting manufacturing inputs, consumer goods, and critical commodities.
- Potential sabotage or cyber attacks targeting ports, pipelines, and digital infrastructure.
- Civilian infrastructure becoming military targets when ports, shipping terminals, or logistics facilities are used for military operations, increasing risks to commercial shipping crews, port operators, and logistics companies.

For multinational companies, such disruptions can translate into millions of dollars in additional operating costs, delayed production schedules, and reduced supply chain reliability.

Strategic Implications

Organisations operating internationally should reassess their exposure to choke-point vulnerabilities and infrastructure concentration. The geographic concentration of trade routes and energy flows creates systemic risks that can cascade across supply chains and financial markets.



Possible considerations include:

- diversification of logistics routes and suppliers
- monitoring geopolitical developments around key transit corridors
- contingency planning for shipping and infrastructure disruptions
- evaluation of dependencies on energy networks and digital infrastructure

Companies with global supply chains may also need to increase investment in logistics resilience, regional sourcing strategies, and strategic inventory buffers.

Outlook

Strategic choke-points will remain central to geopolitical competition as global power rivalry intensifies and economic fragmentation increases. Both state and non-state actors are likely to continue targeting critical infrastructure and transit corridors as a means of exerting economic and political leverage.

The increasing use of civilian infrastructure for military purposes may further blur the distinction between commercial and military targets in several strategic transit corridors.

As tensions persist across multiple regions, the vulnerability of global logistics and infrastructure networks will remain a significant source of operational risk for international organisations.