

New shipping crisis brings 'resilience' question to the fore again



The closure of the Strait of Hormuz amid the war in the Middle East has brought the notion of resilience in shipping back to the forefront. Photo credit: Below the Sky / Shutterstock.com.

[Lars Jensen, Journal of Commerce contributor](#) | Mar 23, 2026, 12:16 PM EDT

The turmoil caused by the closure of the Strait of Hormuz has brought the notion of resilience in shipping back to the forefront.

In part by people asking, seemingly rhetorical, why the industry did not prepare to be more resilient, and in part why the governments in the region did not prepare for more resilience. Add to this the somewhat fanciful, and quite impractical, notion of digging a canal from the Arabian Sea straight through UAE and Oman into the Persian Gulf itself.

On the surface, the matter of resilience appears to be a reasonable question, but upon closer inspection, it turns out to be anything but.



When it comes to resilience in the supply chain, this is not a new discussion at all. I wrote about this very topic [in the Journal of Commerce in March 2021](#). At the time, the context was the disruptions stemming from the pandemic, which had given rise to calls for more resilience in the supply chain.

At the time, I pointed out that supply chains had evolved this way because efficiency is the core driver behind everything — efficiency in terms of lower costs, leaner inventories, higher utilization of assets such as vessels, terminals, trucks etc. Still, within these confines, the supply chain was typically quite resilient on a day-to-day basis, with the main vulnerability being more systemic risks.

As I pointed out at the time, there are plenty of known systemic risks for which there is no willingness to pay for added resilience.

To underscore this point, I listed a range of examples of such systemic risks where there is no willingness to pay for added resilience, including: a major earthquake devastating key port and inland infrastructure in a major port location, the outbreak of war closing critical transit corridors for shipping, a pandemic, tensions between the US and China in the South China Sea, and a cyber-attack.

In the five years since that was written, we saw the grounding of the *Ever Given* in 2021, the Red Sea vessel attacks that began impacting Suez Canal transits in late 2023, drought restrictions along the Panama Canal in 2023–24, and now the closure of the Strait of Hormuz.

The risks still stand. And it appears that not a lot is being done to bolster the industry's resilience against these.

The cost hesitancy of resilience

During the height of the pandemic freight rate spikes, I came across plenty of shippers willing to focus more on long-term resilience and tone down short-term cost savings. As the market then normalized during 2023, I also experienced most of this willingness to disappear entirely. It briefly reawakened in the early part of the Red Sea crisis in 2024, but as supply chains normalized on the longer route around southern Africa, this once more abated.

In such an environment, there is no business case for offering more resilient supply chains. Container lines were ridiculed in late 2023 for having, once again, created significant overcapacity. No one wanted to pay for this as resilience, and carriers

became loss-making — only to see this overcapacity be sorely needed due to the Red Sea crisis.

If we look at Hormuz as an example, how should we have made the supply chains more resilient? Sure, pipelines could be built for oil products, but how about the container shipping sector? This would require massive overland capacity to be built in terms of trucks and rail, a solution that under normal circumstances would be much too expensive compared with the shipping option, and hence would remain idle. I see critics focus on the governments in the Gulf states for not creating such resilience. And sure, in theory, they could have built and paid for this additional infrastructure to stand idle just in case.

But if that is the argument, we can also ask why the US government does not build a large new container terminal to stand empty just in case we get an earthquake that incapacitates the Los Angeles-Long Beach port complex.

Of course, that is a rhetorical question. No one will be building a second Los Angeles/Long Beach port complex to stand empty just in case. And that is why the resilience many ask for in a time of crisis will often not be available.

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