Strait of Hormuz Factsheet

International Energy Agency (IEA)

Last updated: February 2026

Overview

The Strait of Hormuz is a narrow sea passage, separating the Arabian Peninsula and Iran, and connecting the Persian Gulf with the Gulf of Oman and the Arabian Sea. At its narrowest point, the Strait is only 29 nautical miles wide (54 km) and it consists of 2-mile-wide navigable channels (3.7 km) for inbound and outbound shipping as well as a 2-mile-wide buffer zone.

The Strait of Hormuz, through which an average of 20 million barrels per day (mb/d) of crude oil and oil products were shipped in 2025, is one of the world's most critical oil transit chokepoints. With around 25% of the world's seaborne oil trade transiting the Strait, and options to bypass it being limited, any disruption to flows through the Strait would have huge consequences for world oil markets.

While Saudi Arabia and the United Arab Emirates (UAE) have some oil export routes that do not transit the Strait of Hormuz, other countries including Iran, Iraq, Kuwait, Qatar and Bahrain rely on the Strait to deliver the vast majority of their oil exports.

A closure of the Strait would also have significant implications for global gas trade, as this would strand LNG exports from Qatar and the UAE, which together represent almost 20% of global LNG exports.

Oil

- 20 mb/d, around 25% world seaborne oil trade, transits the Strait – 80% destined for Asia.
- 3.5 to 5.5 mb/d of pipeline capacity with the potential to re-direct crude flows to avoid the Strait.
- Lasting disruptions unlikely, but even if short-lived would have significant impact on oil markets.

Natural gas

- About 93% of Qatar's and 96% of the UAE's LNG exports transit through the Strait, representing 19% of global LNG trade.

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Oil

The Strait of Hormuz is the primary export route for oil produced by Saudi Arabia, the UAE, Kuwait, Qatar, Iraq, Bahrain and Iran. Apart from physically disrupting oil shipments from these countries, any prolonged disruption in the Strait of Hormuz could also render unavailable the vast majority of the world's spare production capacity – most of which is held by Saudi Arabia. The bulk of the oil leaving the Strait heads to Asian countries, with China, India and Japan being the main importers.

Crude oil exports

In 2025, nearly 15 mb/d of crude oil, nearly 34% of global crude oil trade, passed through the Strait of Hormuz – with most of the exports destined for Asia. China and India combined received 44% of these exports. IEA countries import about 29% of the crude oil coming through the Strait, with Japan and Korea particularly reliant on oil flows passing through the Strait. Around 600 kb/d, or just 4%, of the region's crude flows are routed into Europe.

In 2025, nearly 20 mb/d of oil was exported via the Strait. There is an estimated 3.5 to 5.5 mb/d of available capacity to export crude out of the Gulf on alternative routes through Saudi Arabia's pipeline to the Red Sea and via the UAE's pipeline to the port of Fujairah.

Oil product exports

Additionally, around 5 mb/d of oil products were exported via the Strait in 2025, with most products destined for Asian markets.

	Crude oil (including condensates)	**Products**	**Total**
Bahrain	0.00	0.21	0.21
Iran	1.69	0.72	2.41
Iraq	3.32	0.31	3.63
Kuwait	1.40	0.97	2.37
Qatar	0.73	0.69	1.43

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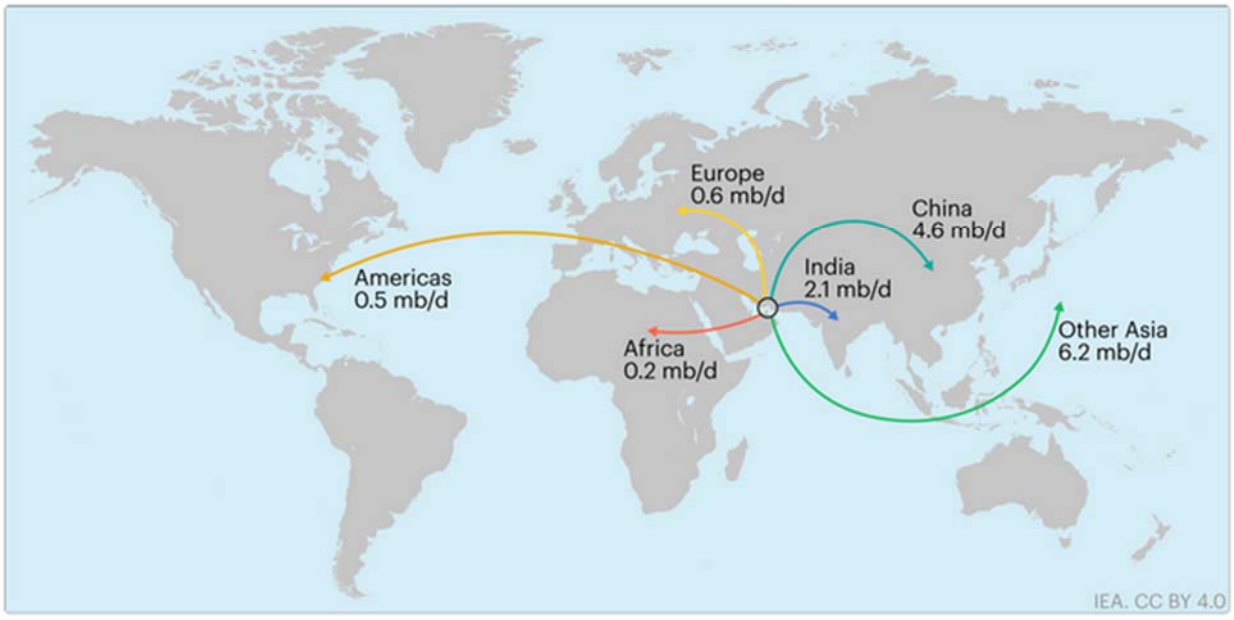
	Crude oil (including condensates)	Products	Total
Saudi Arabia	5.43	0.80	6.23
Saudi-Kuwaiti Neutral Zone	0.35	0.00	0.35
United Arab Emirates	2.02	1.22	3.24
Total Hormuz	14.95	4.93	19.87

Note: For the full year 2025.
Sources: IEA analyses based on Kpler.

Crude oil exports transiting the Strait of Hormuz by destination (2025)



Total does not match sum of adding individual numbers due to destinations not indicated. Source: IEA analysis based on Kpler.

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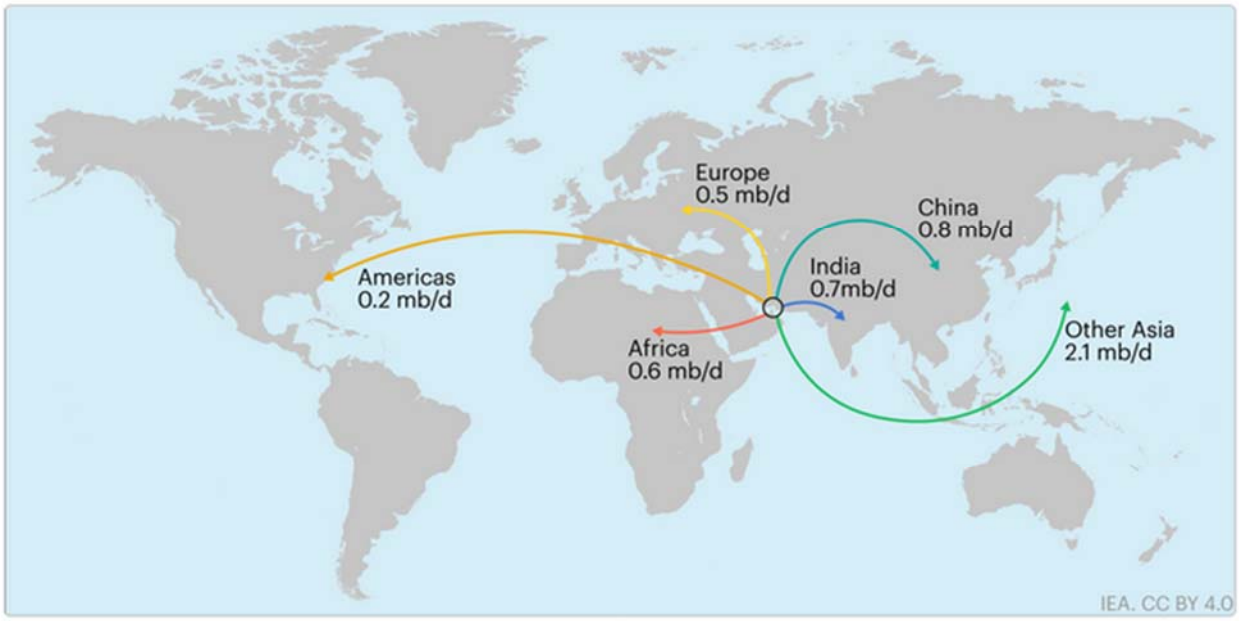
Oil product exports transiting the Strait of Hormuz by destination (2025)



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Alternative export routes

Available capacity on alternative export routes is limited. Only Saudi Arabia and the UAE have operational crude pipelines that could potentially re-route flows to bypass the Strait of Hormuz, with an estimated 3.5 to 5.5 mb/d of available capacity. While additional capacity may exist in major pipelines to bypass the Strait, the logistics and supply chains needed to re-route and export substantial flows have not been robustly tested.

UAE – the Abu Dhabi Crude Oil Pipeline (ADCOP) runs 400 km from onshore oil facilities at Habshan to Fujairah. The original nameplate capacity of the line is 1.5 mb/d with a reported current capacity close to 1.8 mb/d. The UAE exports around 1.1 mb/d of domestic crude via this route, leaving room for up to 700 kb/d of additional volumes in the case of a Strait closure.

Saudi Arabia – the Abqaiq-Yanbu pipeline system (East-West Crude Pipeline or Petroline) crosses Saudi Arabia, connecting Abqaiq to Yanbu on the Red Sea. The system is composed of two lines with a total design capacity of 5 mb/d of crude oil. In

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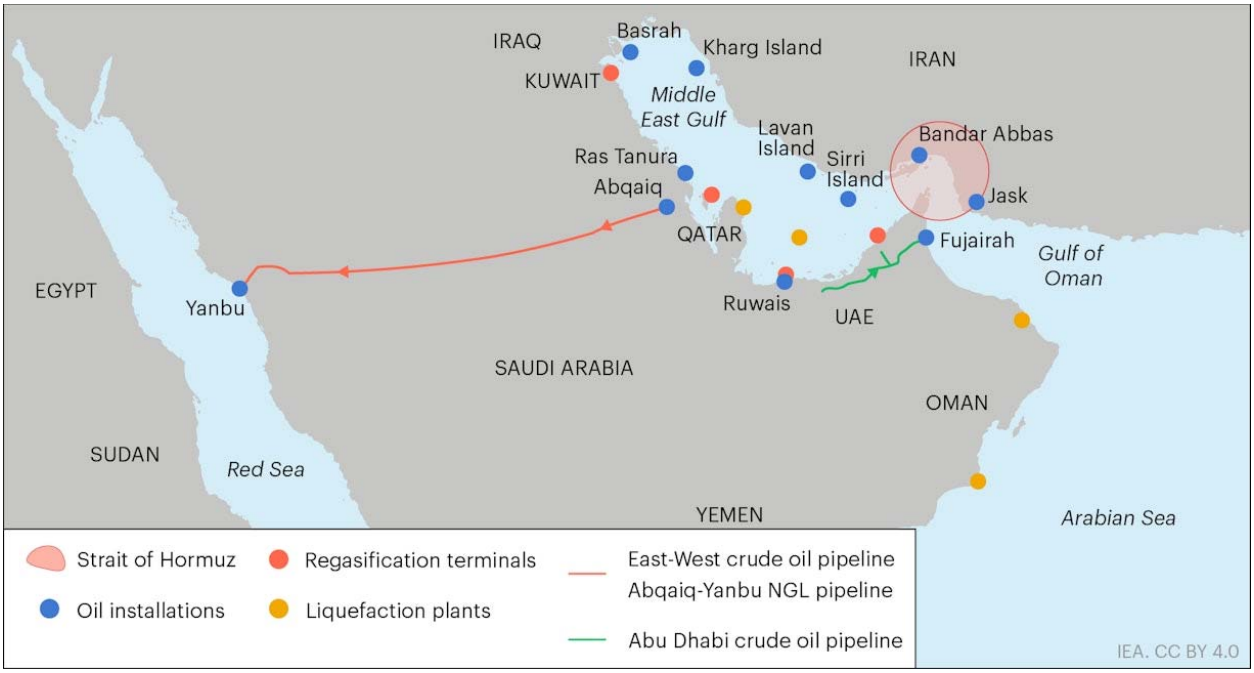
March 2025, Aramco reported that it had increased capacity to 7 mb/d, but sustainable flows have not been tested at this level. As of early 2026, it is estimated that about 2 mb/d of the pipeline's capacity is used, leaving between 3 and 5 mb/d of spare capacity, depending on operational conditions and available export capacity on the Saudi West Coast.

There is also a natural gas liquids pipeline running parallel to the **Petroline, the Abqaiq-Yanbu NGL pipeline**, with a capacity of 300 kb/d, which is fully utilised.

Iran – the Jask oil terminal was officially inaugurated in 2021 to transport crude oil from the Goreh-Jask pipeline to Jask on the Gulf of Oman. The pipeline has a reported capacity of 1 mb/d. However, the pipeline and port effectively remain non-operational. A test load was exported from Jask in late 2024, but no further oil has been exported from Jask since then. The terminal is currently not considered a viable crude export option for Iranian crude.

Alternative routes



Potential market impact

The sheer volume of oil that is exported via the Strait of Hormuz, and the limited options to bypass it, means that any disruption to flows would have huge consequences for world oil markets. A significant spike in oil prices would be inevitable and physical shortages would quickly develop if the disruption were to be prolonged.

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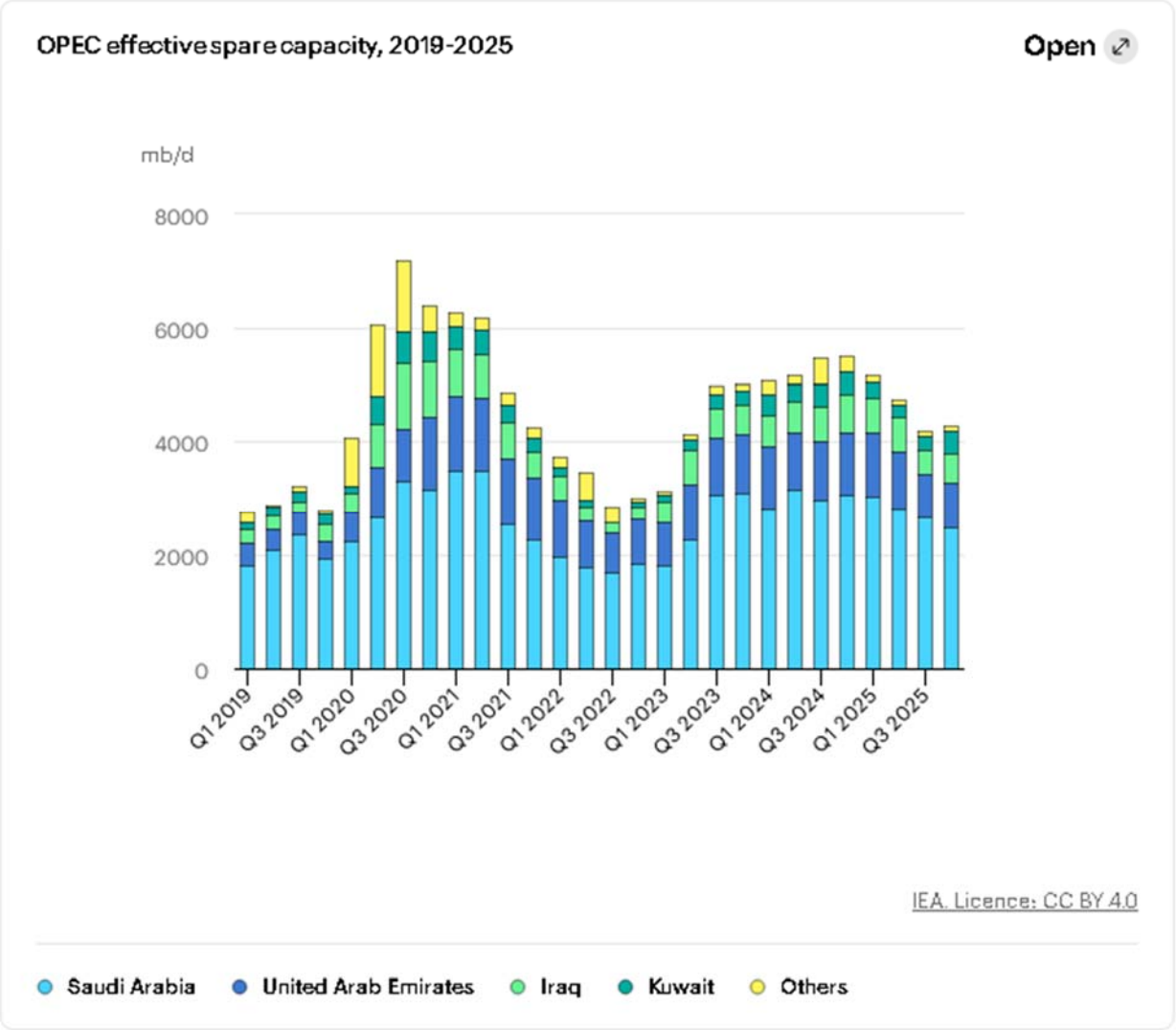
While most of the oil transiting the Strait is destined for Asian markets, the impact of a disruption to the Strait would be global due to its immediate impact on pricing. The market impact would be exacerbated by the fact that, in addition disrupting shipments of oil transiting the Strait, the vast majority of the world's spare crude oil production capacity could be made unavailable as well.

The world's spare crude oil production capacity, primarily held by Saudi Arabia, was running over 4 mb/d in the Q42025 (excluding countries under sanctions).



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Natural gas

Exports

Except for deliveries to Kuwait, the entirety of LNG exports from Qatar and the UAE transit the Strait of Hormuz. Qatar is currently the world's second largest LNG exporter, with total exports of over 112 bcm in 2025, while the UAE exported a more modest 7 bcm. Qatar and the UAE supplied almost 7 bcm to Kuwait in 2025, while the total volume of LNG transiting the Strait was just over 112 bcm in 2025, equating to almost 20% of global LNG trade.

There are no alternative routes to supply natural gas from Qatar or the UAE to the global LNG market other than the existing LNG liquefaction facilities. Qatar supplies piped gas to the UAE and Oman via the Dolphin pipeline (almost 20.5 bcm in 2025); however, the pipeline has limited spare capacity, while Oman's LNG export terminals had a utilisation rate of close to 100%.

Asian markets are the main destination of Qatari and UAE LNG. In 2025, almost 90% of the total volumes exported via the Strait of Hormuz was destined to the Asian market, while the share of Europe was just over 10%. In turn, the share of LNG delivered via the Strait accounted for around 27% of Asia's total LNG imports in 2025 and for just around 7% of Europe's total LNG inflows during the same period of time.

Potential market impact

A disruption to LNG flows transiting the Strait of Hormuz would represent a major supply shock to the global gas market given the major role of Qatar in global LNG trade, and the inability to bring this LNG to the market through alternative routes. Global LNG supply would drop by over 300 mcm/d - double the average amount of gas that passed through the Nord Stream pipeline in 2021. Considering that LNG liquefaction plants in other export markets are running close to nameplate capacity, it would be impossible to replace these lost volumes at short notice.

The loss of almost 20% of global LNG supply would fuel price volatility and necessitate further demand adjustments across key Asian and European import markets. Countries with a strong reliance on Qatari and Emirati LNG (both via term contracts and short-term procurements) would be most strongly impacted.

Bangladesh, India and Pakistan imported almost two-thirds of their total LNG supplies via the Strait of Hormuz in 2025, making them particularly vulnerable to potential disruptions to transit flows.

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Moreover, natural gas dominates the power sector of Bangladesh and Pakistan, with gas-fired generation accounting for 50% and 25% of their electricity supply mix, respectively, in 2024. Inadequate LNG supplies would cause a deterioration of electricity supply security in those price sensitive markets and could lead to production curtailments in their gas-intensive industries, including fertilisers.

The effects of the supply shock would be felt well beyond the markets directly relying on Qatari and Emirati LNG, however. The shortfall in these supplies would naturally exacerbate the competition for spot LNG volumes and put strong upward pressure on spot LNG prices both in Asia and Europe. A supply shock of such magnitude will ultimately necessitate demand side adjustments, including minimising gas-fired generation in the power sector, mandated demand savings in public buildings and production curtailments in the gas- and energy-intensive industrial sectors.

Sources:

- Ref: https://www.iea.org/about/oil-security-and-emergency-response/strait-of-hormuz