

FINZDATA RESEARCH · NAUTICAL

Ships move before prices print

Global shipping traffic as point-in-time data: 28 chokepoints daily since 2019, live vessel positions, and port calls — every revision kept.

EXECUTIVE SUMMARY

Five things the shipping data saw first

−92%

Hormuz closed. Transits fell from 82.9 a day to 6.3 from 7 March 2026; Brent rose 55% in the next 20 trading days.

+123%

Oil found another door. Saudi exports from Yanbu on the Red Sea more than doubled while Kuwait's Mina Al Ahmadi fell 96%.

−63%

The Red Sea never reopened. Bab el-Mandeb runs at 27.6 transits a day against 74.6 before the attacks; the Cape of Good Hope carries 80% more.

−46%

The Bosphorus emptied quietly. From 92 transits a day in April to 50 by October, with no published explanation yet.

t 0.6

Speed is the edge. A week-late count is already in the price; same-day data and knowing closure from detour are not.

WHAT IT IS

Physical trade, measured daily and stored as it was known

28

chokepoints, daily since 2019

Transits by vessel type and cargo capacity through Hormuz, Suez, Malacca, Panama and 24 more.
79,744 chokepoint-days.

27,386

vessels seen in one day

Live positions, identity and voyage messages from a global AIS network:
975,525 positions on 26 October 2026.

2,000+

ports, daily port calls

Port calls by vessel type with estimated import and export tonnes, plus a ten-year US vessel-track history being loaded day by day.

STRAIT OF HORMUZ • TRANSITS PER DAY

The 2026 closure, read straight off the data

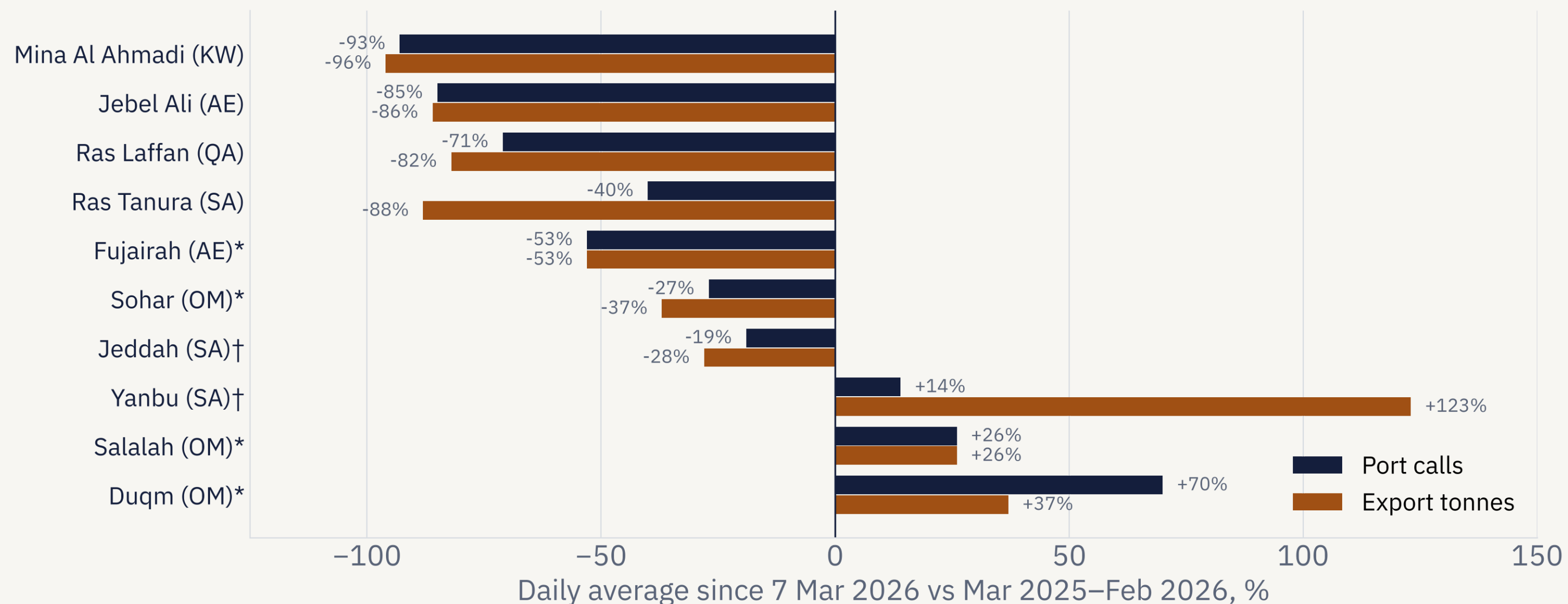
**TAKEAWAY**

From 82.9 transits a day (Jan 2025–Feb 2026) to 6.3 since 7 March; tankers from 46.5 to 2.5 a day. One series priced the year's biggest energy shock.

Source: FinzData, IMF PortWatch daily transits, latest vintage, through 18 Oct 2026; 7-day average. Closure dating per S&P Global and gCaptain reporting.

PORT BY PORT · SINCE THE CLOSURE

Gulf terminals emptied; ports outside Hormuz took the trade

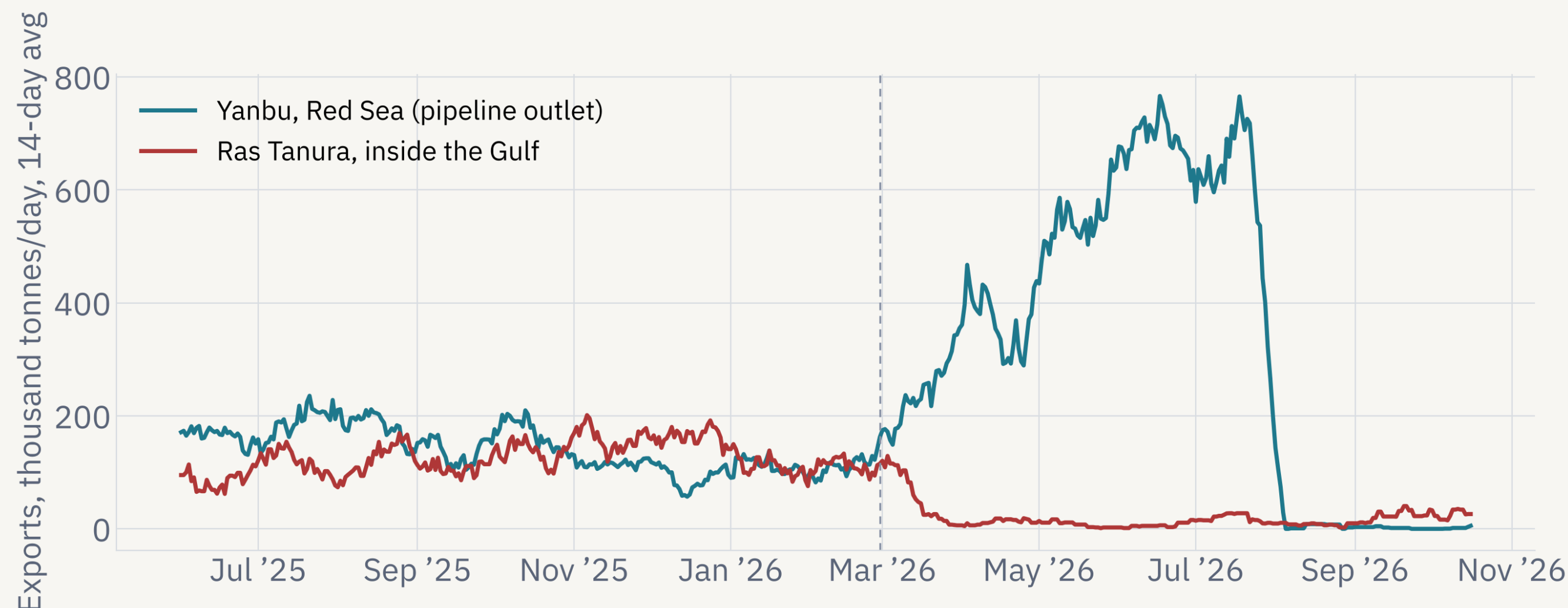
**TAKEAWAY**

Kuwait's Mina Al Ahmadi exports -96%, Ras Tanura -88%, Qatar's Ras Laffan -82%. Saudi Yanbu on the Red Sea +123%; Oman's Duqm port calls +70%.

Source: FinzData, IMF PortWatch daily port calls and estimated export tonnes; 7 Mar–16 Oct 2026 vs Mar 2025–Feb 2026. * outside Hormuz. † Saudi Red Sea coast.

SAUDI CRUDE EXPORTS • YANBU VS RAS TANURA

The bypass, then the dark: why raw AIS needs a second source

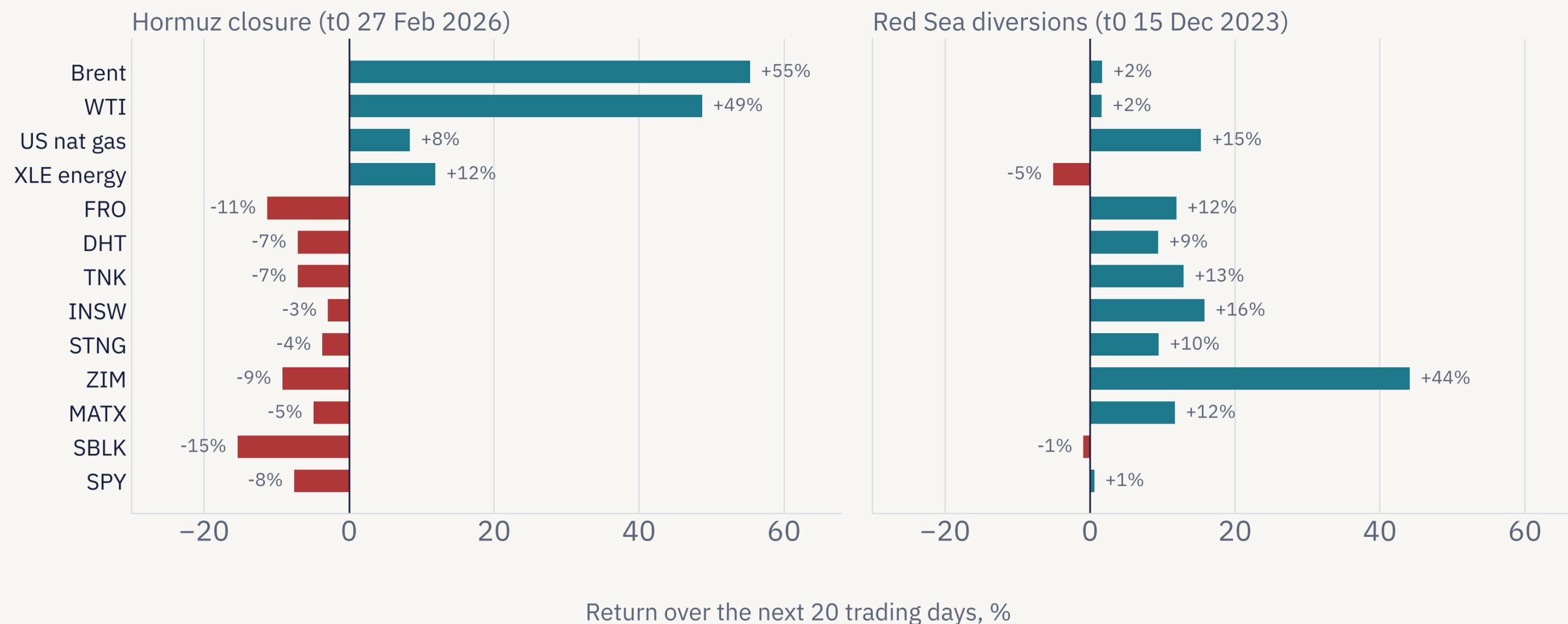
**TAKEAWAY**

Yanbu went from 146k to 576k tonnes a day (June–July), about 4.2m barrels. In August the count fell to near zero while reports had loadings continuing, with tankers' AIS switched off.

Source: FinzData, IMF PortWatch estimated exports, 14-day average. Cross-checks: Signal Ocean via Reuters, 4.7m bpd on 13 Jul; Azernews, five VLCCs loading on 3 Aug.

EVENT STUDY • 20 TRADING DAYS AFTER EACH SHOCK

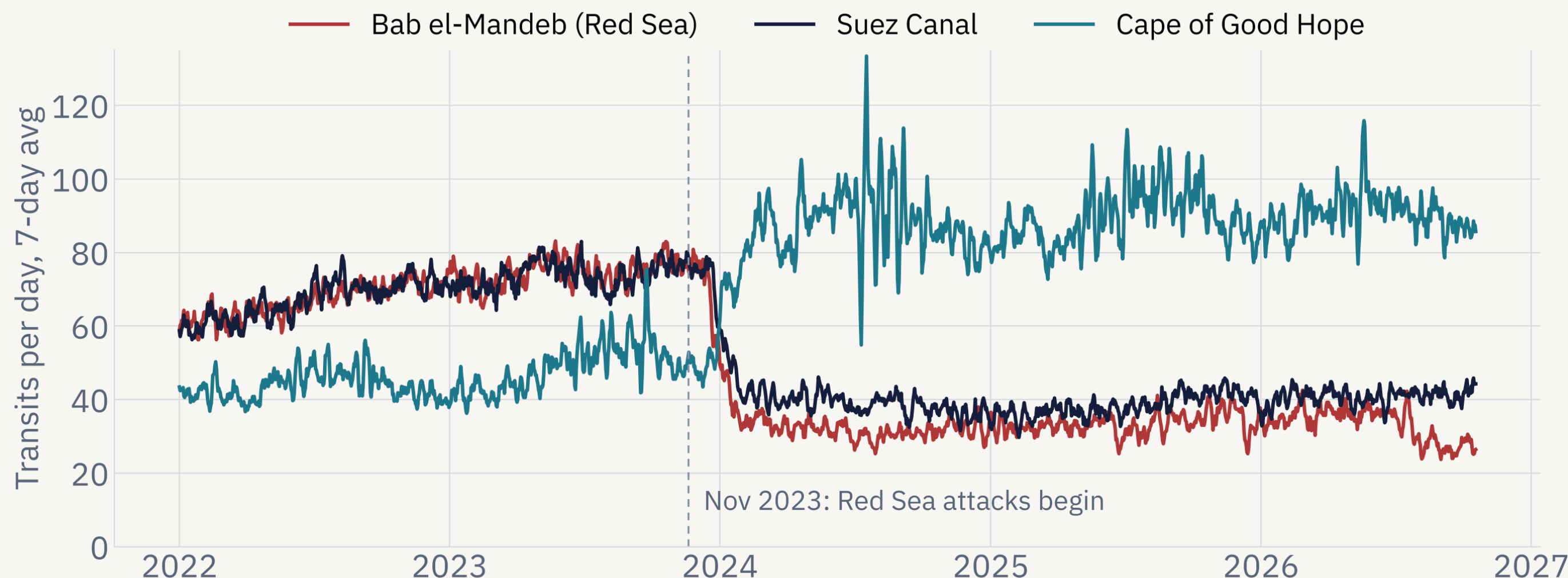
Two shipping shocks, opposite winners

**TAKEAWAY**

A closure cuts cargoes: Brent +55%, tanker stocks -3% to -11%. A detour lengthens voyages: tankers +9% to +16%, ZIM +44%. Knowing which kind of shock it is matters more than knowing there is one.

RED SEA • SUEZ • CAPE OF GOOD HOPE

Two years of rerouting around Africa, in three lines

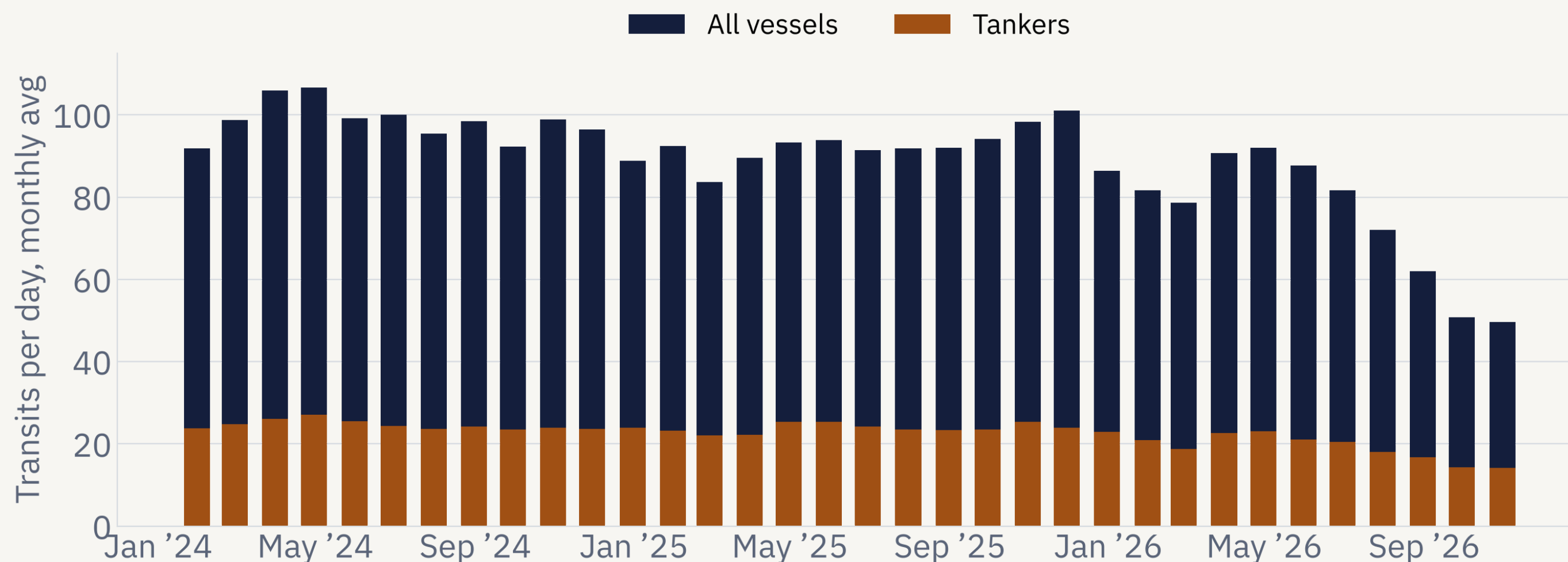
**TAKEAWAY**

Bab el-Mandeb fell from 74.6 a day to 32.5 in 2024; the Cape rose from 48.9 to 87.0. Nearly three years on, the route has not come back: 27.6 a day over the last 90 days.

Source: FinzData, IMF PortWatch daily transits, 7-day average. Before = 1 Jan–31 Oct 2023; 2024 = calendar year; last 90 days to 18 Oct 2026.

BOSPORUS · TRANSITS PER DAY, MONTHLY

A quieter collapse the headlines have not explained

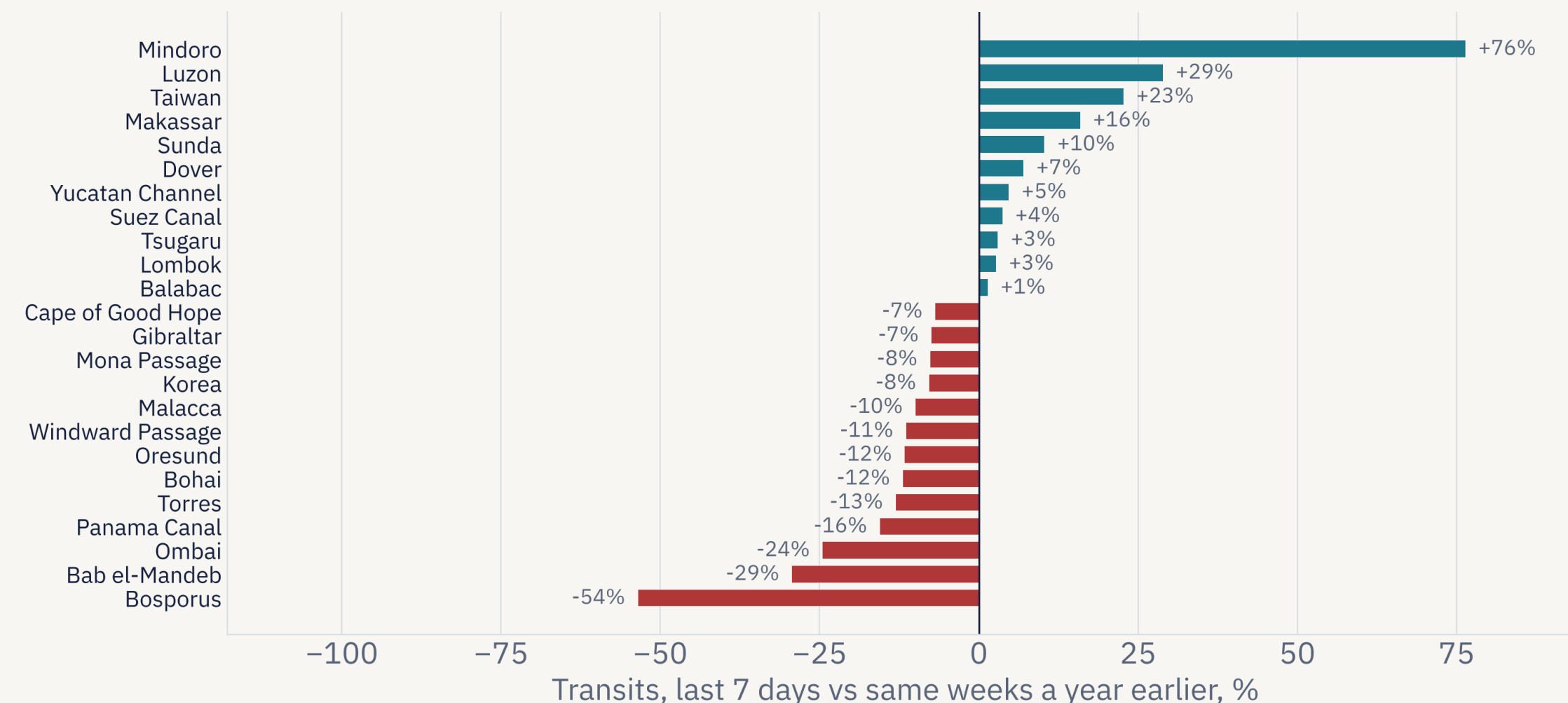
**TAKEAWAY**

From 92 transits a day in April to 50 in September and October; tankers from 23 to 14. Turkish figures showed only -1.7% for Q1. The slide since June is the kind of break the dataset surfaces first.

Source: FinzData, IMF PortWatch, monthly means of daily transits, through 18 Oct 2026. Q1 figure: Turkish maritime directorate via PortsEurope.

24 CHOKEPOINTS · THIS WEEK VS A YEAR AGO

Every trade lane, scored the same way every week



Sharpest falls

Hormuz -96%, Bosporus -54%, Bab el-Mandeb -29%, Panama -16%

Strongest gains

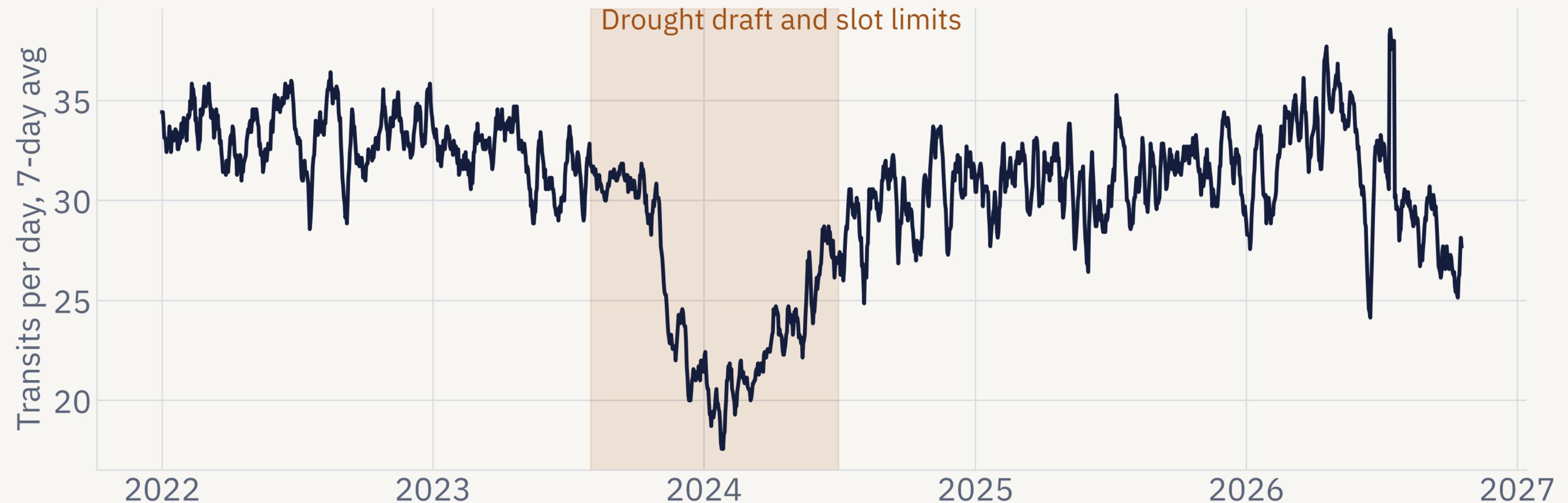
Mindoro +76%, Luzon +29%, Taiwan Strait +23%, Makassar +16%

Asia's inner lanes are busier while the Gulf and Black Sea exits are emptier.

Source: FinzData, IMF PortWatch; mean transits in the week to 18 Oct 2026 vs the same weeks of 2025. Chokepoints under 5 transits a day, or without a year-earlier week, omitted.

PANAMA CANAL • TRANSITS PER DAY

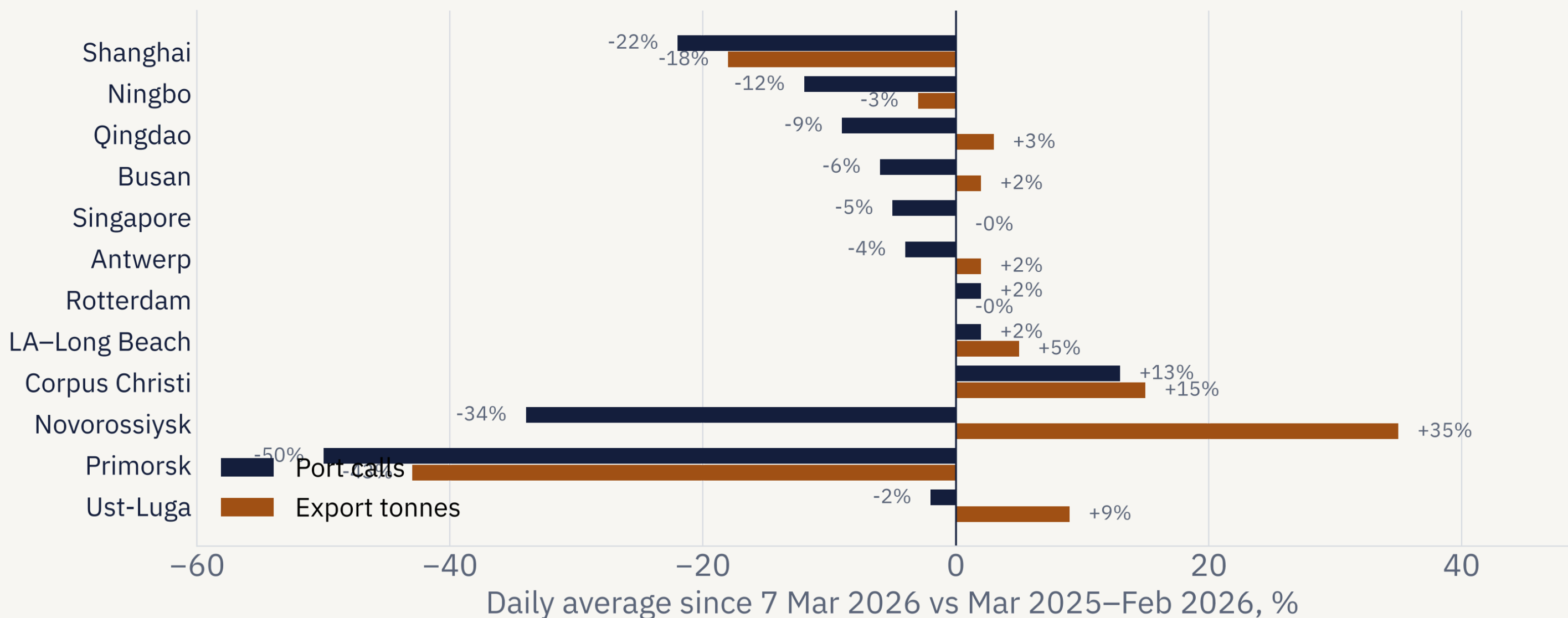
A drought you could trade, before the headlines



TAKEAWAY From 33.4 transits a day in 2022 to 21.5 at the depth of the draft limits (Nov 2023–Feb 2024); still only 28.3 over the last 90 days.

WORLD HUBS • SINCE MARCH 2026

China's ports slowed; Europe and the US held

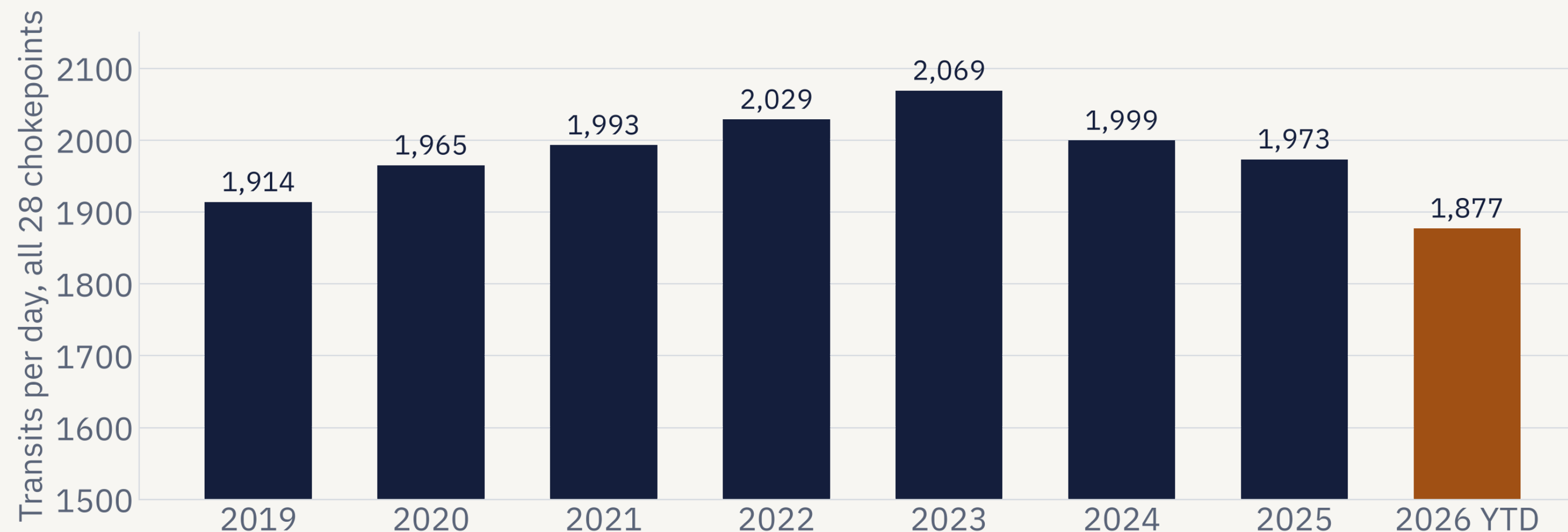
**TAKEAWAY**

Shanghai calls -22%, exports -18%; Ningbo -12%. Rotterdam +2%, LA-Long Beach +2%, Corpus Christi, the main US crude export port, +13% calls and +15% exports.

Source: FinzData, IMF PortWatch daily port calls and estimated export tonnes; 7 Mar–16 Oct 2026 vs Mar 2025–Feb 2026.

ALL 28 CHOKEPOINTS • AVERAGE TRANSITS PER DAY

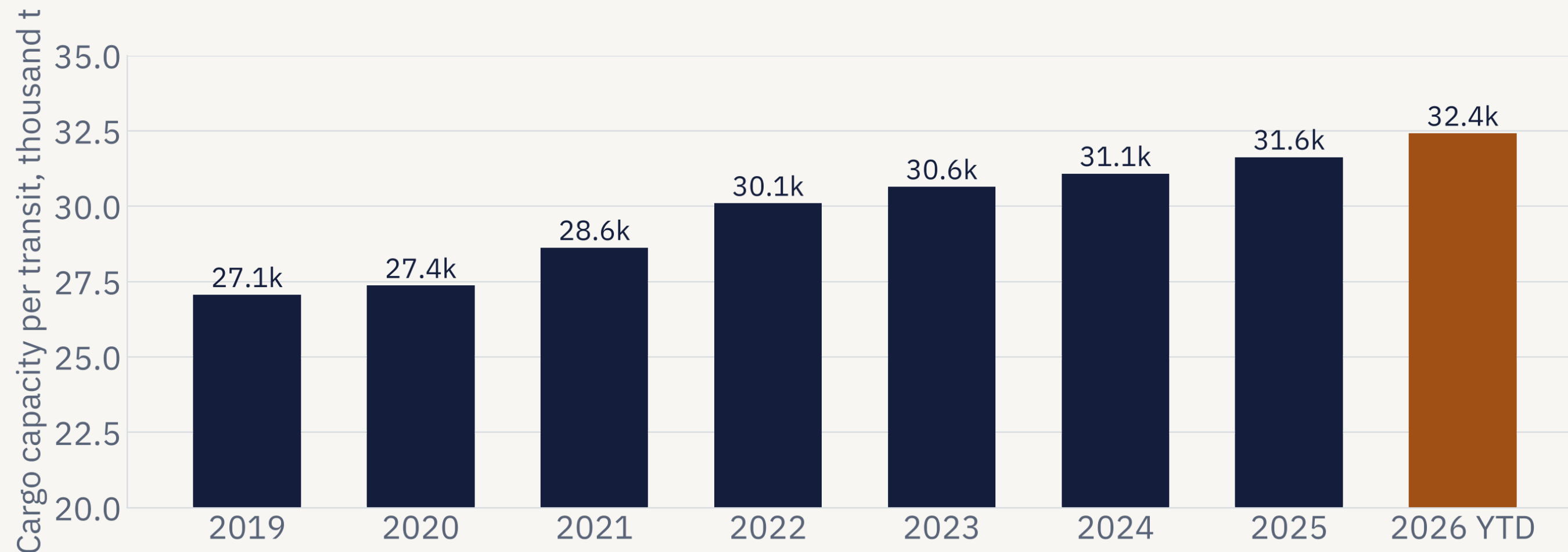
Chokepoint traffic peaked in 2023 and is falling

**TAKEAWAY**

2,069 transits a day in 2023, 1,877 in 2026 so far: down 9%. Capacity through the straits fell less, 63.4 to 60.9 million tonnes a day, as ships got bigger and routes longer.

ALL CHOKEPOINTS • CARGO CAPACITY PER TRANSIT

Fewer ships, bigger ships: count and tonnage diverge

**TAKEAWAY**

Capacity per transit rose every year, 27.1k tonnes in 2019 to 32.4k in 2026 (+20%). A model that counts ships misreads trade; ours carries both count and tonnage.

Source: FinzData, IMF PortWatch, total capacity divided by total transits across 28 chokepoints per year; 2026 through 18 Oct.

DOES THE WEEKLY IMF SERIES PREDICT PRICES ON ITS OWN?

Coincident, not predictive: the edge is speed and context

Weekly change in...	vs	same week, t	week after IMF publishes, t
Hormuz tanker transits	Brent	−3.1	0.6
Hormuz tanker transits	FRO	0.8	−0.6
Red Sea container transits	ZIM	0.5	−1.5
Global tanker capacity	Brent	−0.1	0.8
Global container transits	SPY	−0.1	0.7

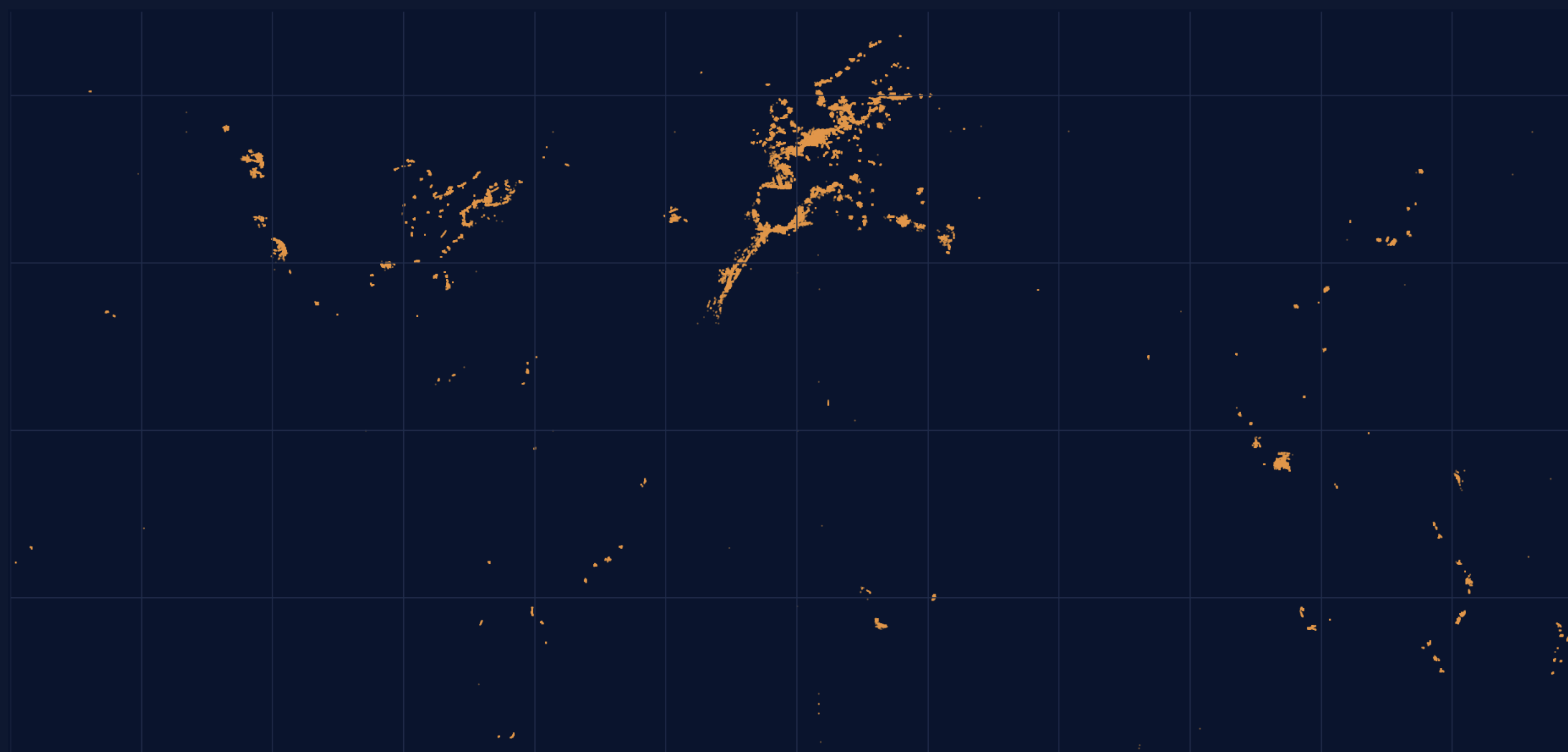
TAKEAWAY

Hormuz tankers move with Brent in the same week (t −3.1) but say nothing once the week-late IMF release is respected. Value comes from the live feed and from conditioning, not from a raw count.

Source: FinzData, IMF PortWatch and closing prices. Weekly log changes, Mar 2019–Oct 2026, about 400 weeks (ZIM 299); t from the correlation. $|t| \geq 2$ marks significance.

LIVE LAYER · ONE DAY OF VESSEL POSITIONS

27,386 vessels in a single day, refreshed every 15 minutes

**975,525** positions on 26 Oct 2026**6,112** cargo ships · **2,706** tankers · **2,739** passenger**24** sea regions scored daily: vessels, tankers, and tankers at anchor

Vessel search by name, MMSI or IMO with a two-day track

Source: FinzData, global terrestrial AIS. Coverage is densest within about 50 nautical miles of shore; open ocean, the Gulf and the Red Sea come from the IMF layer.

LIVE LAYER · 24 SEA REGIONS, ONE DAY

Where the fleet sits, and how much of it is waiting

Region	Vessels	Tankers	Tankers at anchor or moored
North Sea	9,017	1,159	946 (82%)
Baltic Sea	2,741	210	120 (57%)
Western Mediterranean	2,045	185	113 (61%)
US Gulf of Mexico	960	92	62 (67%)
Japan	683	149	88 (59%)
Malacca and Singapore	574	113	81 (72%)
Persian Gulf and Hormuz	4	0	— (no coverage)

The waiting share is the signal to track day by day: floating storage and port queues show up there first.

Source: FinzData, live AIS. Each vessel at its last fix in the 24 hours to 27 Oct 2026, 00:00 UTC; at anchor = navigational status anchored or moored, or speed under 0.5 knots.

THE DATASETS

Five series, one point-in-time contract

Dataset	Coverage	History	Update	Key fields
Chokepoint transits	28 straits and canals	2019 →	daily, ~1-wk lag	transits, capacity by type
Port calls and trade	2,065 ports	2019 → (loading)	daily, ~1-wk lag	calls by type, trade tonnes
Sea-region fleet index	24 regions	Oct 2026 →	daily	vessels, tankers at anchor
Fleet composition	global live AIS	Oct 2026 →	every 15 min	vessels by type, moving
Vessel tracks	US and Danish waters	2015 → (loading)	backfill	5-min positions, identity

Every row carries **knowledge_ts**, the moment we learned it. Revised days are kept as new vintages, never overwritten.

POINT IN TIME

A backtest sees only what was knowable that day



Stamped on arrival

Each row records when we received it, separate from the day it describes. IMF data lands about a week late; the stamp says so.



Every vintage kept

When a source revises a day, we append the new value. Ask for the series as of any date and get what was published then.



Checked every run

Invalid positions dropped, failed days retried, partial days purged before re-loading so no row is counted twice.

WHO USES IT, AND FOR WHAT

Four questions the data answers before the market does

Energy and tankers

Hormuz and Bab el-Mandeb tanker transits, Gulf tankers at anchor, floating storage. For crude, products and tanker equities.

Containers and freight

Suez, Panama and Cape container counts and capacity. For liners, freight rates and retailers' supply chains.

Trade nowcasting

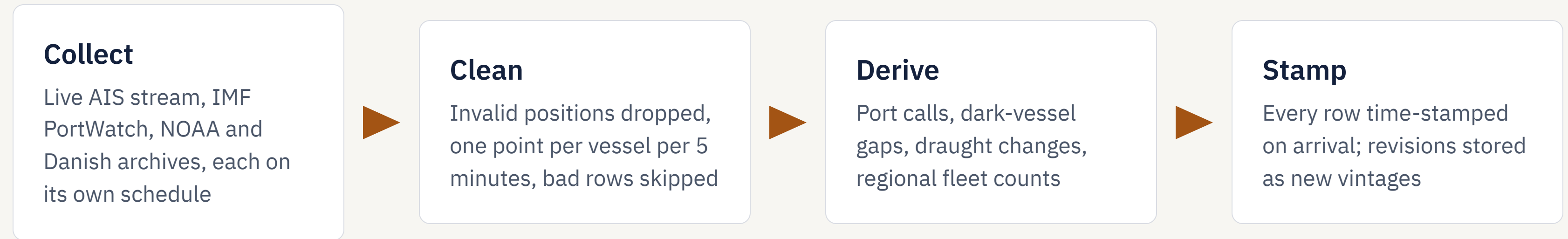
Daily port calls and import and export tonnes, weeks ahead of official trade statistics. For EM macro and FX.

Event risk

A weekly score of every lane against its own year-ago level flags closures and reroutes the day they start.

HOW IT IS BUILT

From raw radio messages to a clean daily series



Every module is built against a written test and passes it before it runs: 17 collection, derivation and dashboard modules, each gated. Collectors run unattended around the clock and report their own health.

WHAT IT DOES NOT DO YET

The limits, stated plainly

Limit	What it means for you
Coastal live coverage	Our live feed sees about 50 nautical miles offshore. The Gulf, Red Sea and open ocean come from the IMF layer instead.
IMF publishing lag	Chokepoint and port series arrive about a week after the day; recent days are revised, and we keep each vintage.
Live history is short	The live indexes start in October 2026. The long history is the IMF layer from 2019 and the US archive.
No return claims	Our own test finds the weekly IMF series coincident, not predictive. The live-feed test is pre-registered and runs before any claim.
Dark vessels	Ships that switch AIS off vanish from every AIS count, as at Yanbu in August 2026. We mark those gaps rather than report zeros.

EARLY ACCESS

Put the world's shipping lanes beside your prices

FinzData Nautical joins 16,000+ US stocks, 139 futures markets, GEX, COT and macro vintages on one point-in-time clock. Built for AI, quants, data scientists and financial analysts.

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