PLENARY SESSION INSIGHTS REPORT

هيئة موانئ الفجيرة
Fujairah Ports Authority

FUJAIRAH
14 ENERGY MARKETS FORUM 2026

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"Resilience & Optionality are Both Sides of same PPP "Public Private Partnership" Coin Necessary to Deliver the Economic Viability of 'Just in Case' Redundancy!"

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FOREWORD

Resilience and Optionality are Two Sides of the Public Private Partnership Coin

My main takeaway from 34 brainstorming sessions at the Fujairah Energy Markets Forum 2026 is that resilience and optionality are two sides of the same public private partnership coin. Bringing them together will be essential to making the redundancy required in a "just in case" world economically viable.

Governments need essential supplies to keep moving when established routes fail. Businesses need investments that generate sustainable returns across changing market conditions. The challenge is to build infrastructure that serves both objectives, even when its greatest strategic value emerges during disruptions that conventional investment models struggle to price.

An alternative pipeline, additional storage or spare terminal capacity can appear underutilised during normal conditions. During a crisis, that same asset can protect national revenues, sustain industrial activity and preserve access to customers. Its value extends beyond the income recorded by its operator.

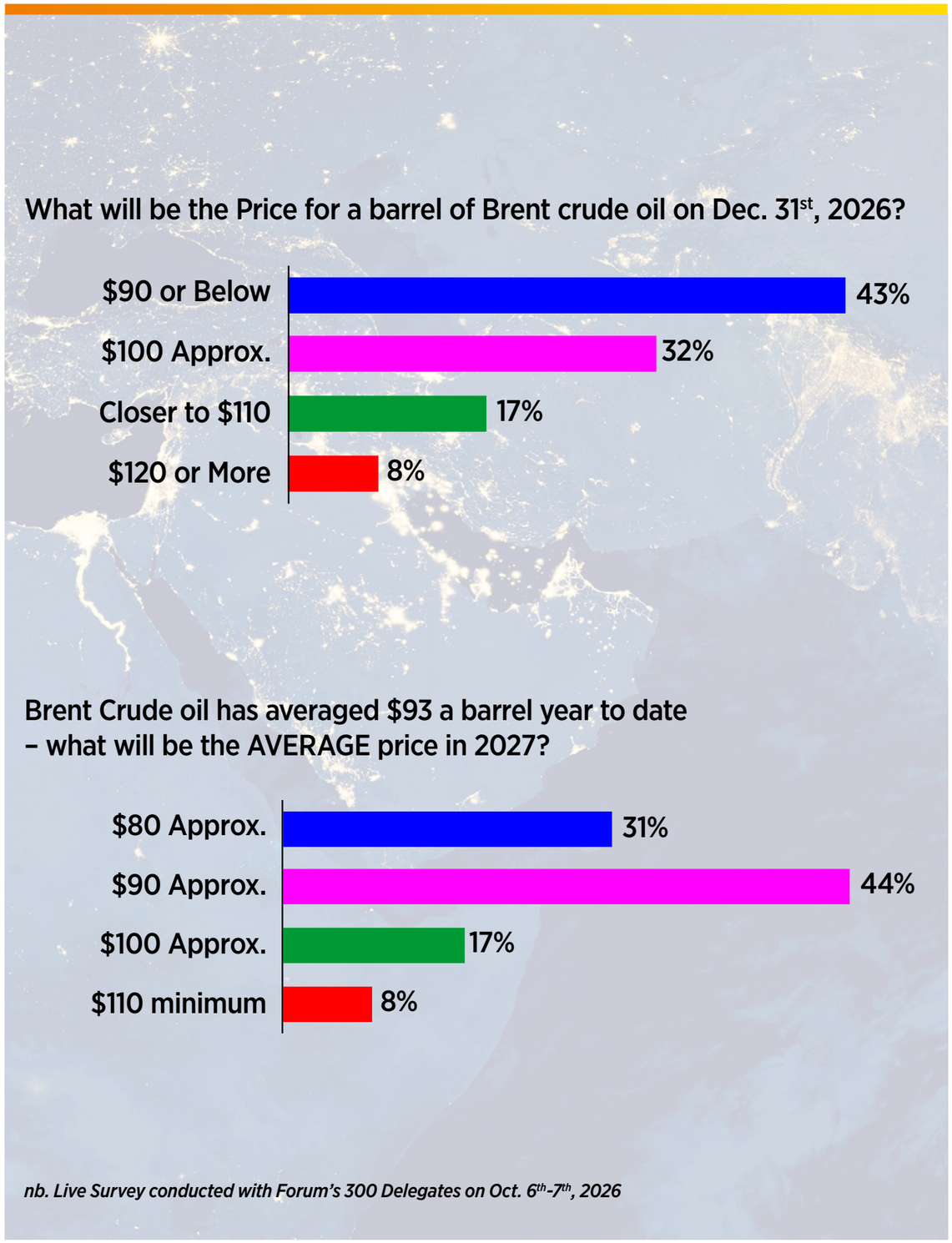
This is where public private partnerships become critical. Governments can recognise the wider economic benefits of continuity and help establish the conditions for investment. Private partners bring capital, operational expertise and commercial networks that keep infrastructure productive between crises. Appropriate risk sharing, capacity commitments and dependable access arrangements can help turn a strategic requirement into an investable proposition.

Optionality strengthens that proposition. Infrastructure capable of serving different suppliers, destinations and products offers more opportunities to earn returns while retaining the capacity to respond when disruption strikes. Resilience protects continuity; optionality gives that protection commercial value.

Fujairah provides a compelling setting for this discussion. Its location outside the Strait of Hormuz and its connected energy infrastructure demonstrate why patient investment in alternative routes matters to producers and consumers alike.

The two chapters that follow explore the public policy priorities and industry opportunities emerging from this challenge. Together, they point towards a shared task: developing partnerships that make preparedness commercially sustainable and give economies workable alternatives when they need them most. ■

Sean Evers
Founder and Managing Director
Gulf Intelligence



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CHAPTER 1

National Policy & Building Resilience



EXECUTIVE SUMMARY

CONTRIBUTORS

- **H.E. Dr. Sheikh Abdullah bin Hamad Al Khalifa, Bahrain Minister of Transportation & Telecommunications**
- **Ang Wee Keong, Chief Executive of the Maritime and Port Authority of Singapore**
- **Richard Swann, Head of Market Reporting – Oil, Shipping and Chemicals, S&P Global Energy**

Energy security depends on the ability to deliver supplies through alternative routes when established corridors become unavailable. The national policy panel examined how governments can prepare for disruption while maintaining international connectivity and managing the additional cost of resilience.

Bahrain's experience highlighted the value of longstanding GCC institutional cooperation. Alternative ports in the UAE, Saudi Arabia and Oman, combined with land transport through the King Fahd Causeway, helped sustain essential supplies. Accelerating regional railway integration and connecting rail networks to ports emerged as priorities for strengthening this flexibility.

Singapore's approach combined cooperation to protect navigation through the Straits of Malacca and Singapore with supplier diversification, international agreements and storage capacity. These measures demonstrated that resilience requires complementary physical infrastructure and reliable relationships.

The market discussion exposed the limits of adaptation. Large price differences between supplies inside and outside the Strait of Hormuz indicated continuing fragmentation. Changes to the Platts Dubai benchmark illustrated the challenge of maintaining transparent pricing when established markets divide.

The chapter's finding is that contingency capacity must be developed before a crisis. Governments need to sustain investment in alternative routes and integrated infrastructure, particularly where normal commercial calculations fail to capture the wider economic value of continuity.

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Top 10 Insights

1 Resilience must precede the crisis

Alternative infrastructure and institutional relationships take years to develop. Bahrain's response depended on established cooperation between transport ministries, ports and shipping operators. Contingency planning is most effective when the necessary relationships and routes already exist and can be activated under pressure.

2 Dependencies should be diversified

The objective is to remain globally connected while reducing exposure to individual suppliers and corridors. Targeted national capacity should complement regional and international partnerships. Maintaining several workable options provides a stronger response to disruption than relying on a single efficient supply chain.

3 Fujairah provides regional continuity

Fujairah's port and export infrastructure support resilience beyond the UAE. Bahrain's use of alternative UAE entry points showed how investment in one country can protect neighbouring economies. Infrastructure outside the Strait of Hormuz has particular value when access through the strait is restricted.

4 GCC railway integration is increasingly urgent

An integrated railway network linked to ports would strengthen alternatives to maritime routes. Completing the legislative and regulatory framework is essential to making cross-border connections effective. The discussion placed regional rail development within the broader task of maintaining essential supplies during disruption.

5 Navigation rights need practical cooperation

International legal protections require sustained operational and diplomatic support. Cooperation among Singapore, Malaysia and Indonesia includes navigation infrastructure and engagement with countries using the straits. International Maritime Organization initiatives reinforce the shared interest in keeping critical shipping lanes open.

6 Deliverable supplies command a substantial premium

The panel cited price differences of approximately $37 per barrel for crude and $38 for diesel between supplies outside and inside the Strait of Hormuz. These estimates demonstrate how location and delivery constraints can divide markets even when commodities remain physically available.

7 Strategic value exceeds normal investment calculations

The Abu Dhabi–Fujairah pipeline demonstrates the economic value of alternative export capacity during disruption. Private investors may struggle to justify comparable projects without knowing when another crisis will occur. Long-term public planning can support infrastructure whose benefits include wider economic protection.

8 Storage complements diversified sourcing

Singapore's underground storage provided contingency capacity developed before the crisis. Supplier diversification and regular monitoring of bunker supply commitments supported that physical buffer. Inventories create time to respond, while alternative sourcing helps maintain replenishment as trading conditions change.

9 Market fragmentation threatens price discovery

Emergency trading arrangements and individual tenders complicate established pricing practices. The panel described limiting the Platts Dubai benchmark to crude loading outside the Strait of Hormuz to reflect the accessible market. Whether previous market integration returns remained an open question.

10 Consumer responses could reshape energy demand

Importing countries are examining dependence on Middle Eastern supply and on oil more broadly. Diversifying producers addresses one vulnerability; diversifying energy sources addresses another. Persistent delivery uncertainty could therefore affect long-term purchasing strategies as well as the infrastructure serving those markets. ■

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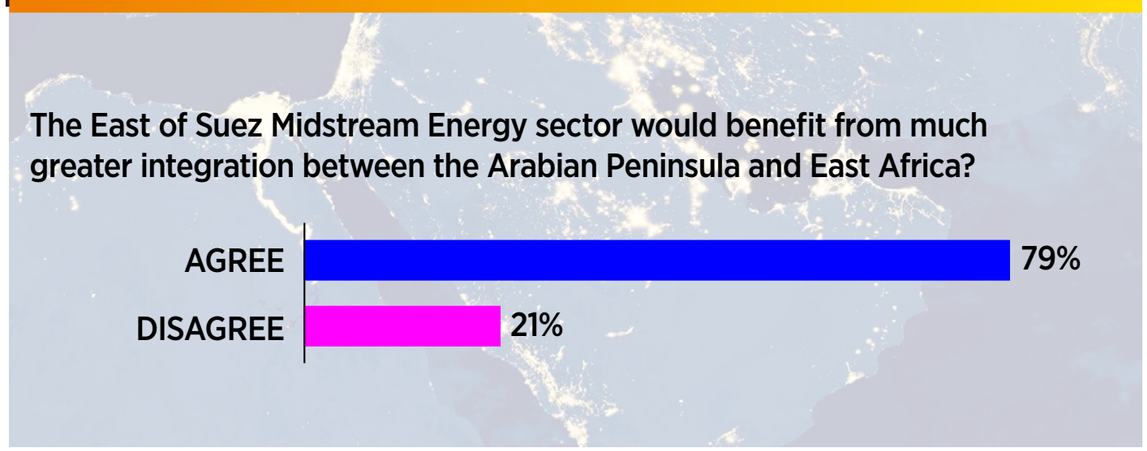

Regional Connectivity Must Become Critical Infrastructure



H.E. Dr. Sheikh Abdullah bin Hamad Al Khalifa
Bahrain Minister of Transportation and Telecommunications

Resilience depends on the options available when normal supply routes fail. For Bahrain, an island economy, disruption to maritime access becomes a question of maintaining essential supplies. Our experience has reinforced the importance of preparing alternative routes and strengthening the relationships that make them usable.

The GCC's institutional bonds have helped us respond. Cooperation between transport ministries and port authorities, supported by established relationships with shipping lines, enabled supplies to move through alternative ports in the UAE, Saudi Arabia and Oman. Land transport through the King Fahd Causeway provided the connection into Bahrain.

These arrangements reflect years of cooperation. They cannot be created instantly under crisis conditions. Governments should therefore invest in the links between institutions, alongside the assets that carry goods.

Redundancy requires a balance. We must remain internationally connected while developing national capacity in critical areas. Diversifying dependencies gives us alternatives without sacrificing the advantages of regional trade. The objective is to ensure that a disruption in one part of the network does not remove every available option.

Regional railway integration deserves greater urgency. Connecting the six GCC countries and linking railway infrastructure to ports would expand the routes available for essential supplies. Effective integration also requires a legislative and regulatory framework that allows these connections to function across borders.

Fujairah demonstrates the value of patient planning. Its infrastructure has supported the UAE and its neighbours during disruption. That benefit should inform how we assess future investment.

We should use this experience to advance transport integration before the next emergency. Alternative ports, land connections and railways need to operate as a coordinated regional system. Resilience will grow through preparation and institutions that can work together when their economies need them most. The work must continue between crises, when time allows us to build capacity and test practical arrangements. ■

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PLENARY SESSION INSIGHTS REPORT

Open Shipping Lanes Require Shared Responsibility



Ang Wee Keong
Chief Executive of the Maritime and Port Authority of Singapore

Singapore's experience shows how quickly disruption in one shipping corridor can affect markets elsewhere. Maintaining reliable energy supplies requires cooperation across borders and preparation at home. No trading hub can secure continuity through its own efforts.

The Straits of Malacca and Singapore are international waterways. We have worked with Indonesia and Malaysia over many years through cooperative mechanisms involving countries and organisations that use these routes. Supporting aids to navigation and maintaining dialogue help keep the waterways safe and accessible.

International institutions also have a role. Singapore's initiative at the International Maritime Organization sought to reaffirm the importance of keeping vital shipping lanes free and open. Support from other countries, including the UAE, demonstrated the shared interest in protecting navigation.

Supply resilience requires similar cooperation. Agreements with Australia and New Zealand concerning essential supplies strengthened arrangements for maintaining flows during disruption. Regional work on electricity connectivity provides another example of countries improving security through collective action.

Infrastructure must support these relationships. Singapore faces land constraints, but underground hydrocarbon storage has provided capacity and a buffer against uncertainty. Developing that resource before the crisis gave us an option when supply conditions became more difficult.

We also maintain engagement with bunker suppliers. Encouraging diversified sourcing, monitoring future supply commitments and identifying concerns early help authorities and businesses respond before problems become more serious.

The practical task is to keep building these arrangements. Reliable navigation, diverse supply relationships and storage capacity reinforce one another. Each reduces a different vulnerability within an internationally connected energy system.

Countries benefiting from open shipping lanes should continue supporting their maintenance and protection. At the same time, domestic preparedness should give businesses the capacity to absorb disruption. Cooperation works best when it is sustained through normal conditions and remains dependable under pressure, when supply uncertainty spreads across borders. ■





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PLENARY SESSION INSIGHTS REPORT

Energy Markets Need Resilience in Pricing as Well as Delivery



Richard Swann
Head of Market Reporting – Oil, Shipping and Chemicals
S&P Global Energy

Energy markets have adapted to disruption, but continued deliveries should not be treated as proof that stability has returned. The price signals reveal stress. Supplies that can reach customers through accessible routes command very different values from comparable barrels facing delivery constraints.

During the panel discussion, we estimated differences of up to approximately $37 per barrel for crude and around $38 for diesel between supplies outside and inside the Strait of Hormuz. Such gaps demonstrate the economic importance of infrastructure that preserves market access.

The Abu Dhabi pipeline to Fujairah is an example. Its value during this crisis is considerable. Yet investors cannot assume today's price differences will persist. That creates a difficulty for future projects whose strongest returns may arise during events nobody can predict with confidence.

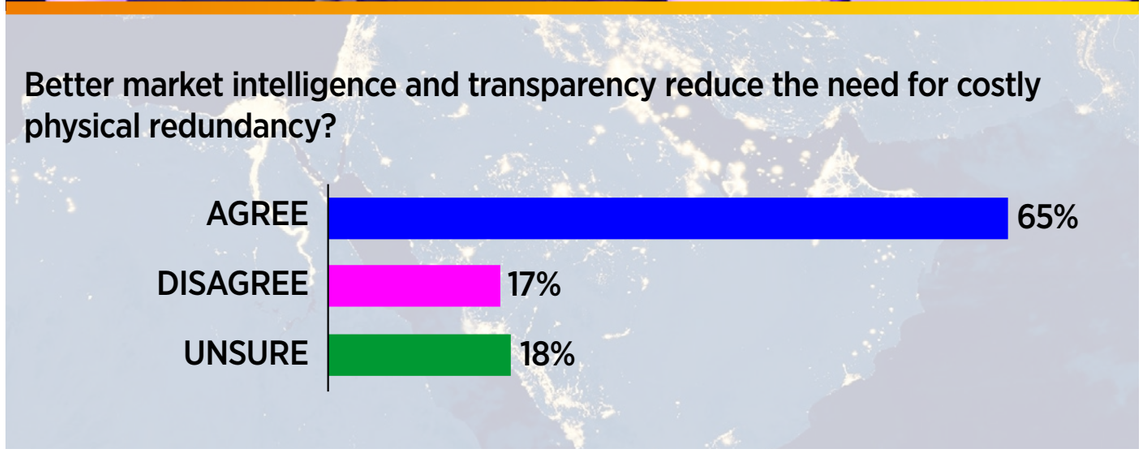
There is another challenge. Emergency supply chains often operate through arrangements that differ from normal commodity trading. Shuttle movements, ship-to-ship transfers and individual tenders help supplies move, but can make it harder to establish a transparent market price.

Benchmarks must reflect those changes. The Platts Dubai assessment previously represented a more interchangeable basket of regional crudes. Restricting it to loadings outside the Strait of Hormuz recognised that the market had divided. Accessible supplies from Oman and Fujairah continued to support trading, although the underlying market became narrower.

Whether that fragmentation proves temporary remains uncertain. Consumers are also asking broader questions about dependence on particular producing regions and energy sources.

Policy and investment decisions should recognise both dimensions of resilience. Infrastructure must sustain delivery, while market information must remain credible enough to guide transactions. Reliable pricing helps participants understand the value of accessible supplies and allocate capital. Preserving that clarity becomes especially important when the routes, trading practices and assumptions underpinning a benchmark change sharply during a period of sustained disruption and uncertainty. ■





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CHAPTER 2

Industry Leadership & Commercial Opportunities



EXECUTIVE SUMMARY

CONTRIBUTORS

- **David Bird, Managing Director and CEO, Dangote Refinery**
- **Tom Baker, Head of Middle East, Vitol**
- **Guy Moeyens, CEO, VTTI**

The industry leadership panel examined the commercial implications of moving from optimised supply chains towards greater contingency capacity. Disruption is increasing the value of reliable delivery and creating opportunities in shipping, refining, storage and distribution, but investment decisions must account for conditions after the crisis.

Greater control of infrastructure emerged as a priority. Dangote's approach links manufacturing with distribution assets and product flexibility. Vitol's involvement across trading, refining, shipping and storage demonstrates how an integrated position can support the redirection of supplies between markets.

The panel distinguished immediate opportunities in operating assets from construction projects requiring years to deliver. Evaluating new infrastructure demands attention to normal commercial use, severe disruption scenarios and national strategic needs. Targeted investments in spare parts, terminals or additional capacity can also improve resilience.

Storage demand is changing. Importing countries are seeking larger, locally accessible inventories, while European refinery closures are encouraging greater emphasis on finished fuels. East African logistics constraints offer opportunities to develop alternative import routes and strengthen connections with Gulf suppliers. LNG resilience requires diversified supply and regasification capacity.

The chapter concludes that commercial opportunity lies in building useful flexibility across the value chain, with assets capable of serving markets as conditions change.

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PLENARY SESSION INSIGHTS REPORT

Top 10 Insights

1 Supply chain control protects market access

Refining capacity needs reliable distribution to reach consumers. Investments in trucks, tank farms and pipelines strengthen the connection between production and sales. Taking greater control of these physical links reduces exposure to external bottlenecks and provides more dependable outlets during disruption.

2 Severe volatility belongs in investment assessments

Average margins across the business cycle can understate the value of contingency capacity. Stress testing should consider periods of major disruption and the returns available when flexible assets remain operational. This can change the assessment of investments previously dismissed under conventional assumptions.

3 Existing assets and new projects have different risks

Operating assets can capture current opportunities immediately. Construction projects may enter service after exceptional margins have disappeared. Investors therefore need to assess an asset's normal use, alternative applications and potential strategic role before committing capital to capacity with a long development timetable.

4 Integration increases commercial flexibility

Combining trading with access to refining, shipping and storage enables companies to redirect supplies across regions. Vitol's experience illustrated how European refinery output could reach eastern markets during disruption. A broader physical presence increases the choices available when established trade patterns change.

5 Targeted improvements can deliver resilience

Spare parts strategies, additional tank capacity and better jetty or terminal access can address particular vulnerabilities. These investments have different costs and development periods from major pipelines or refineries. Selecting the appropriate response requires identifying the actual constraint on reliable delivery.

6 Strategic stocks are becoming more local

Importers are seeking longer inventory coverage and physical stocks accessible within their own countries. The discussion cited moves towards 110 days of coverage in some cases. This creates opportunities for storage development supported by governments, national oil companies and trading businesses.

7 Finished fuels are gaining priority in Europe

Refinery closures increase the importance of holding usable products such as diesel, jet fuel and gasoline. Strategic crude stocks alone cannot replace lost processing capacity. Storage investment therefore needs to reflect the fuel requirements and refining capabilities of the market it serves.

8 Specifications expand export options

Dangote's investment in diesel dewaxing enables production for colder markets even though regional African demand remains the priority. Building international specifications into refinery design broadens potential outlets. Relatively targeted additions can increase the ability to serve different markets under changing commercial conditions.

9 East African delivery constraints invite investment

Growing inland demand is putting pressure on ports and pipelines. Alternative access through Tanga helped diversify supplies into Uganda. Developing additional routes and infrastructure can address bottlenecks, while emerging crude exports could deepen connections between East Africa, the Gulf and Asia.

10 LNG needs adequate receiving capacity

Diversified LNG supply requires sufficient terminal and regasification capacity to reach consumers. Changing cargo origins can support continuity, but physical import constraints still matter. Additional receiving infrastructure, particularly in growing Asian markets, offers opportunities to strengthen national energy resilience. ■

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PLENARY SESSION INSIGHTS REPORT

Refinery Investment Must Build Market Flexibility



David Bird
Managing Director and CEO, Dangote Refinery

Africa should produce what it consumes. That principle underpins our refining investment and the industrialisation we want to support. Achieving it requires attention to the full supply chain, from manufacturing through to the infrastructure that delivers products to customers.

Commercial arrangements help establish markets, but physical distribution gives those relationships durability. Our approach includes strengthening truck distribution and developing tank farms and pipelines in target markets. These investments improve control over the routes connecting production with demand.

Disruption has also changed how infrastructure should be evaluated. Looking only at average margins through the cycle can discount the value of assets that perform strongly when supply chains are under pressure. Investment assessments should test severe volatility and recognise the value of remaining operational when other capacity becomes unavailable.

That reasoning extends to product flexibility. Our African markets remain central to our purpose, but refinery design should preserve the ability to supply international customers when conditions justify it. Meeting different specifications creates additional outlets without changing the regional objective.

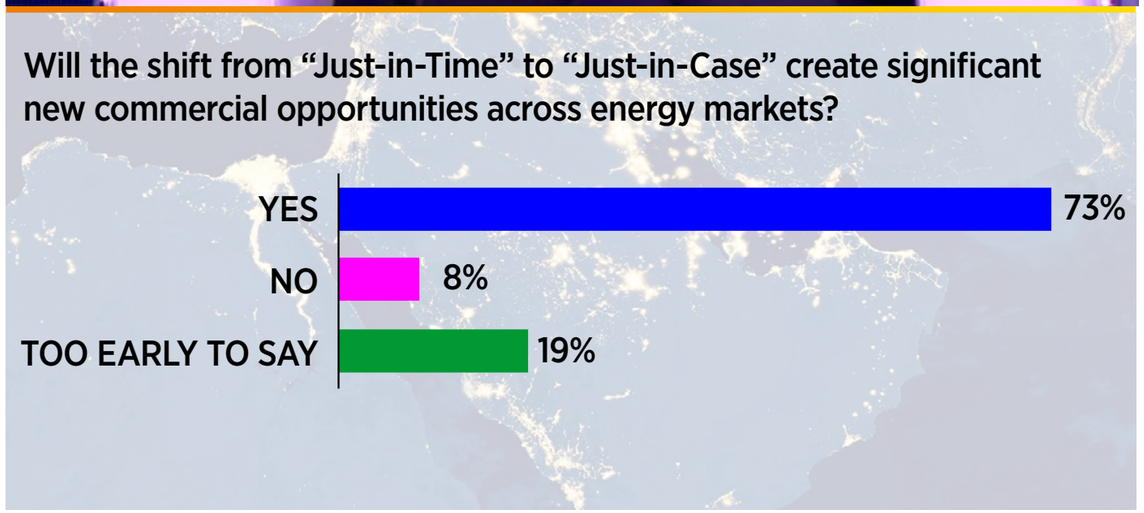
Our diesel investment illustrates this approach. Adding dewaxing capability allows production that meets more demanding cold-weather requirements. Much of our diesel may continue serving tropical markets, yet the capability to supply winter-grade markets gives us an additional commercial option.

Jet fuel also offers intercontinental export opportunities. Designing logistics and product capabilities for different destinations strengthens the resilience of the overall business.

The lesson is to build flexibility into investment decisions early. Distribution infrastructure, suitable export facilities and adaptable product specifications are easier to incorporate during planning than after disruption exposes a weakness.

Africa's industrial development and international market access can reinforce each other. Facilities designed to meet regional needs while retaining export options can sustain production through changing conditions and support the long-term development of reliable African energy supply chains and distribution networks. ■





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PLENARY SESSION INSIGHTS REPORT

Invest in Infrastructure That Works Beyond the Crisis



Tom Baker
Head of Middle East, Vitol

Disruption creates commercial opportunities, but infrastructure investment requires a longer view. A ship operating today can respond to current market conditions. A pipeline or refinery completed several years from now must have a purpose when those conditions change.

Investors need to distinguish these time horizons. Shipping utilisation, refining constraints and regional price differences can support returns from existing assets. New construction requires an assessment of the normal business case and the role the asset could play under alternative circumstances.

Some projects will be driven by national strategic needs. Others must stand on private commercial economics. Understanding that distinction helps determine how a project should be financed and what expectations should govern its operation.

Vitol's development across trading and infrastructure reflects the importance of participation in the value chain. Refining, tankage and shipping provide more ways to respond when flows change. During disruption, output from European refineries has found markets further east, illustrating the flexibility that connected assets can provide.

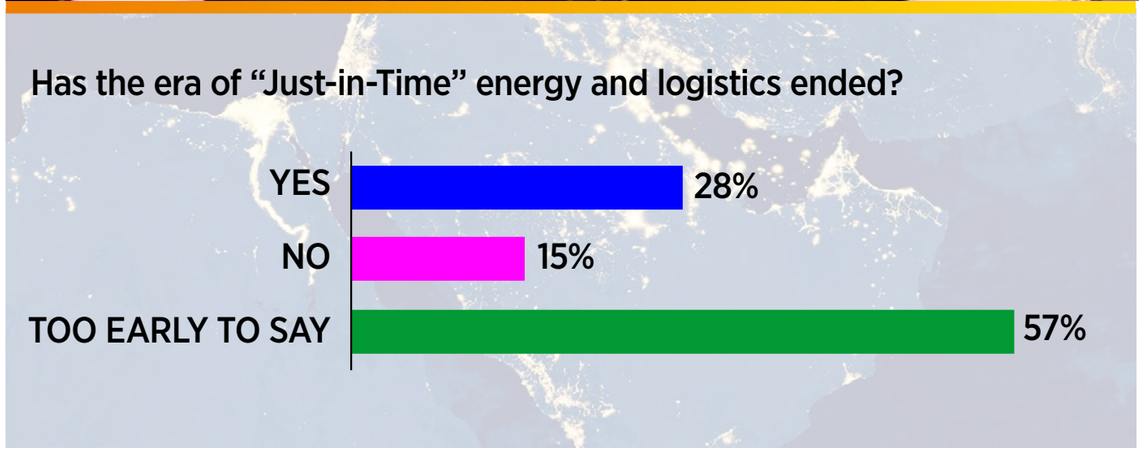
Resilience also comes through interventions. Spare parts, additional tanks, terminal access and jetty capacity each address different constraints. Investment should respond to the vulnerability rather than assume that every problem requires a major new project.

East Africa demonstrates the opportunity. Growing economies and demand have put pressure on delivery infrastructure. Uganda's reliance on a heavily utilised pipeline system created exposure that alternative supply routes helped reduce. Developing access through Tanga can expand import options and address inland logistics constraints.

The Gulf and East Africa remain commercially connected. Strengthening those links requires infrastructure capable of serving demand reliably through changing conditions.

We should invest where additional capacity has a clear function, where operations can adapt, and where the economics remain understandable beyond the current crisis. Those principles help turn short-term opportunities into assets with lasting commercial relevance and dependable access to customers. ■





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PLENARY SESSION INSIGHTS REPORT

Strategic Storage Must Match the Fuels Economies Need



Guy Moeyens
CEO, VTTI

Energy resilience depends on having supplies available where they are needed. Importing countries are reassessing both the size of their strategic inventories and their ability to access stocks. That reassessment creates opportunities to develop storage as part of a connected supply chain.

National oil companies seeking reliable outlets for their production have an interest in controlling more of the route to customers. Importing countries want security of supply. Partnerships between them can support infrastructure that meets both objectives, with storage operators contributing development and operational expertise.

The composition of inventories matters. In Europe, refinery closures are encouraging greater emphasis on finished products. Diesel, jet fuel and gasoline can serve demand directly, while crude stocks depend on available processing capacity. Strategic storage should therefore reflect the capabilities and requirements of each market.

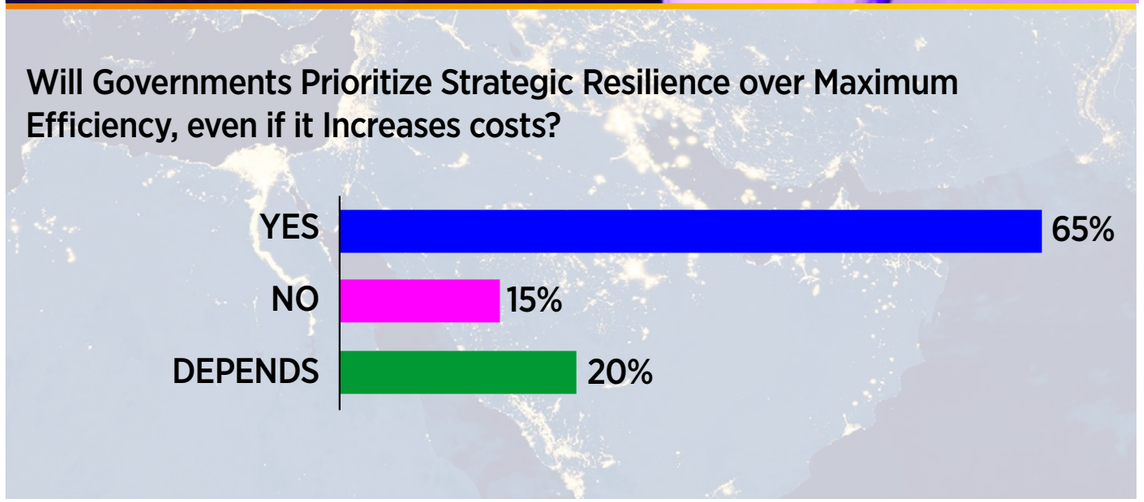
Elsewhere, countries may need both crude and product infrastructure. Financing remains a challenge, creating scope for cooperation with national oil companies and trading businesses. The aim should be physical capacity that countries can access when delivery conditions deteriorate.

Construction costs and resource requirements need management. Inflationary pressure is affecting tank development, but additional capacity remains feasible. Investment decisions should account for execution costs as well as the strategic benefit of greater inventory coverage.

LNG raises a related infrastructure question. Countries need adequate regasification capacity alongside access to cargoes. Changes in the origin of supply can support continuity, while sufficient terminal capacity allows those alternatives to reach consumers. Developments in Asian markets reflect this growing need.

We should assess storage and receiving facilities within the complete delivery chain. Inventory volumes alone cannot establish resilience if the products are unsuitable or access is constrained. Infrastructure becomes more useful when it connects available supplies to the needs of consumers and remains accessible through periods of disruption, market pressure and changing trade flows. ■





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