

Kpler Media Briefing

Middle East Energy and Maritime Disruptions

Flow data as of Wednesday, 7 October 2026 (T-2, to reduce day-to-day revision noise)

Prepared Friday, 9 October 2026. Kpler Insight and Kpler platform data only

1. Executive summary and key price drivers

Kpler Insight reported on 8 October that intensified attacks on tankers drove Gulf crude flows sharply lower this week. Those flows had recovered to pre-war levels in late September. Confirmed Total Hormuz Clearance fell from 12,260 kbd on 4 October to 2,719 kbd on 7 October. The 7-day average of 9,944 kbd sits about 42% below the pre-war baseline of 17,133 kbd. The latest days are preliminary and have typically settled higher as confirmations land. Adding Gulf of Oman terminals and the Red Sea lifts the regional 7-day average to 18,975 kbd, about 19% below its baseline. Kpler Insight said the attacks are supporting risk premiums and freight rates.

Explore these flows in the new [Middle East Flows dashboard](#) in the Kpler terminal. It brings Strait of Hormuz transits, Gulf of Oman ship-to-ship net exports and Red Sea exports together in one view.

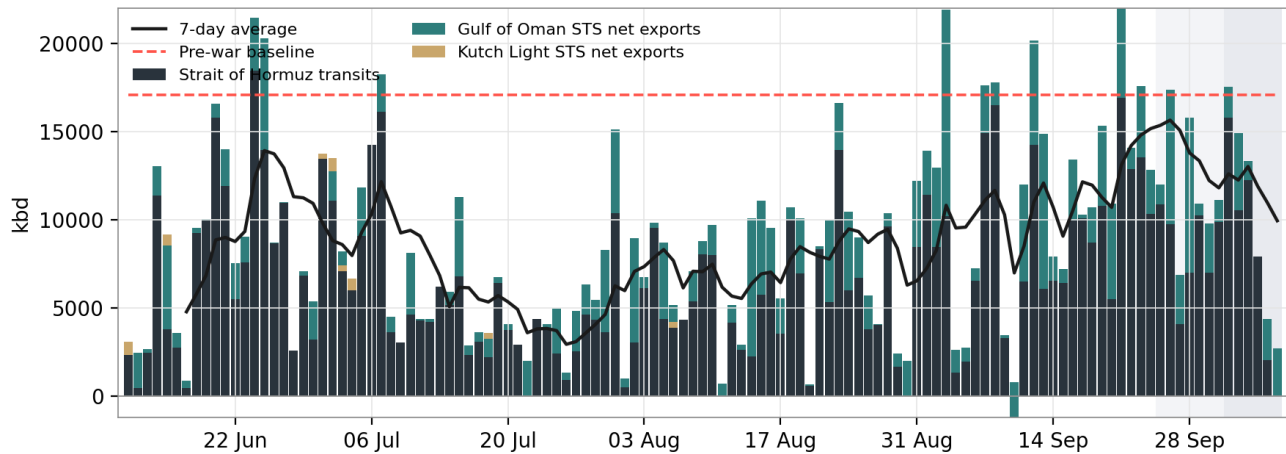
Middle East Regional Flows (kbd)

Middle East Regional Flows (kbd)	7 Oct	6 Oct	5 Oct	4 Oct	7-day MA	Pre-War Baseline
Strait of Hormuz Transits	0	2,046	7,896	13,330	8,671	17,133
Gulf of Oman STS Net Exports	2,719	2,330	0	-1,070	1,273	0
Kutch Light STS Net Exports	0	0	0	0	0	0
1. Total Hormuz Clearance	2,719	4,376	7,896	12,260	9,944	17,133
Crude	2,719	3,000	7,896	8,739	8,471	13,486
Products	0	1,376	0	3,521	1,474	3,591
Fujairah & Oman Terminals	5,525	3,761	6,780	5,625	5,126	3,414
2. + Gulf of Oman Terminals	8,243	8,137	14,676	17,885	15,071	20,491
Crude	6,378	6,458	12,112	11,469	12,126	15,658
Products	1,865	1,679	2,564	6,416	2,945	4,833
Red Sea (Saudi + Unattributed)	11,317	5,687	2,006	2,000	3,904	2,803
3. + Red Sea	19,560	13,824	16,683	19,885	18,975	23,294
Crude	17,378	11,136	14,119	13,469	15,325	16,997
Products	2,182	2,688	2,564	6,416	3,649	6,297
Strait of Hormuz Tanker Crossings	5	9	14	16	13	50
Enter MEG	4	7	9	6	7	25
Exit MEG	1	2	5	10	6	25

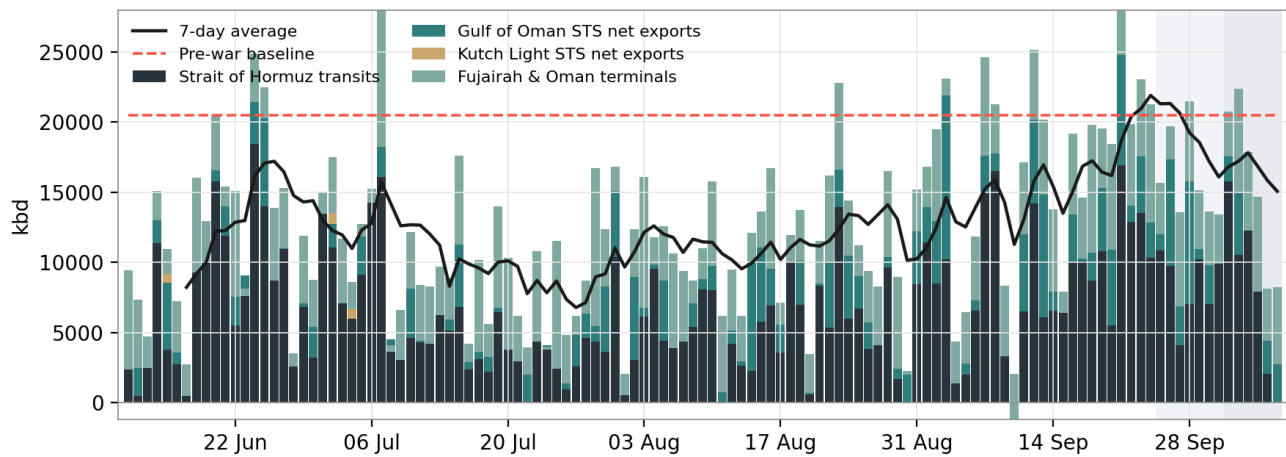
Three cumulative measures of confirmed clearance move outward from the strait itself (1) to Gulf of Oman and Fujairah/Oman terminal loadings (2) and then Red Sea volumes (3). Iranian-origin transits are excluded throughout. Figures are oil only, covering Crude/Co, CPP, DPP and Chem/Bio and excluding NGLs and LNG. Source, Kpler.

Middle East Regional Flows, daily series from 11 June to 7 October

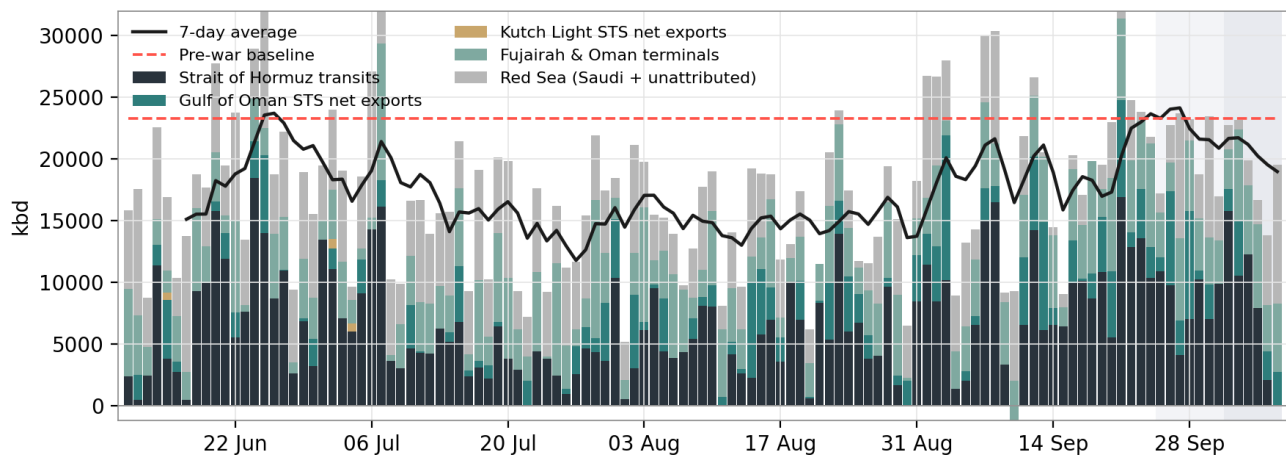
1 • Total Hormuz clearance (kbd)



2 • + Gulf of Oman terminal loadings (kbd)



3 • + Red Sea (kbd)



Stacked bars are the confirmed components of each cumulative measure; the solid line is the 7-day average and the dashed line the pre-war baseline. Shaded bands mark the provisional (8 to 14 days) and preliminary (last 7 days) recency tiers, which have typically settled 1.5 to 2 times higher as later confirmations land. The late-June peak reflects the evacuation of cargoes stranded by the outbreak of the war. Source, Kpler.

Table and chart methodology and caveats

- Every figure is a confirmed floor and can revise upward at any horizon. The recency tiers mark where revisions concentrate, not where they stop.
- Reported figures are older than 14 days, provisional figures are 8 to 14 days old, and preliminary figures cover the last 7 days. Preliminary figures have typically settled 1.5 to 2 times higher once confirmations land.
- Gulf of Oman, Kutch Light and Red Sea volumes with no confirmed load terminal capture ship-to-ship cargo net of unmatched arrivals, and they carry no origin attribution. The Iranian-origin exclusion therefore applies to strait transits only.
- Pre-war baselines are averages over March 2025 to February 2026 on the same definitions and product-bucket selection.
- Strait crossings are dated by transit, unattributed ship-to-ship cargo by the date it surfaces or departs, and berth loadings by loading date. Daily totals therefore mix event timings, and the 7-day averages absorb most of that noise.

Primary drivers

- Intensified attacks on tankers cut Gulf crude flows this week, after a late September recovery to pre-war levels (sections 2 and 3).
- Fujairah crude loadings hit a record 2.62 mbd in September, which shows how far bypass routes now offset the strait (section 2).
- Saudi Arabia exports from both coasts again, but intensified strikes in the Red Sea keep security risk elevated (sections 2 and 4).
- Freight and risk premiums remain high, which supports the Dubai structure and limits further downside (section 2).
- The G7 stock release hit gasoil harder than crude, and European governments are reluctant to release more stock (section 5).
- Trend-following funds moved from short to heavily long in gasoil over the third quarter (section 5).

2. Chokepoint and transit metrics

A. Strait of Hormuz

Confirmed strait transits were 0 kbd on 7 October, a preliminary floor, after 2,046 kbd on 6 October and 7,896 kbd on 5 October. The 7-day average was 8,671 kbd against a pre-war baseline of 17,133 kbd.

Gulf of Oman ship-to-ship net exports were 2,719 kbd on 7 October, after 2,330 kbd on 6 October and 0 kbd on 5 October. Total Hormuz Clearance was 2,719 kbd on 7 October, against 4,376 kbd on 6 October. Daily readings swing widely because crossings are dated by transit, so the 7-day average is the better guide.

Fujairah and Oman terminal loadings reached 5,525 kbd on 7 October. The 7-day average of 5,126 kbd is about 50% above the pre-war baseline of 3,414 kbd. Kpler Insight reported on 8 October that Fujairah crude loadings hit a record 2.62 mbd in September. Net exports, which exclude crude delivered by tanker, also set a record at 2.38 mbd.

That exceeds the 1.5 to 1.8 mbd commonly cited for the ADCOP pipeline. Kpler Insight attributes the surplus to the newly operational 42 mb underground storage and a pipeline able to carry up to 2 mbd. September drew about 11.4 mb from storage, which leaves an estimated 30.6 mb, or about 80 days at that pace. The West-East Pipeline, due in 2027, would lift pipeline capacity to Fujairah to around 3.3 mbd.

Kpler Insight is neutral on the Dubai structure, because recovering Middle Eastern supply faces renewed disruption risks from attacks on commercial vessels. It is optimistic on Asian demand for November Saudi crude, as lower official selling prices help offset elevated freight costs.

B. Bab el-Mandeb and Red Sea

Red Sea volumes were 11,317 kbd on 7 October, after 5,687 kbd on 6 October and 2,006 kbd on 5 October. The 7-day average was 3,904 kbd against a pre-war baseline of 2,803 kbd. Red Sea volumes include cargo with no confirmed load terminal, so the latest reading is preliminary.

Kpler Insight reported on 8 October that intensified strikes in the Red Sea add renewed disruption risk. The resumption of Yanbu exports gives buyers the option to lift cargoes from less risky locations.

3. Maritime risk and fleet status

Kpler Insight reported on 8 October that attacks on tankers intensified this week and drove Gulf crude flows sharply lower. Tanker crossings of the strait fell from 16 on 4 October to 5 on 7 October. The latest day shows 4 entries and 1 exit. The 7-day average of 13 crossings a day compares with 50 before the war. This briefing does not attribute the attacks. The sample below shows 4 laden crude exits, 2 laden products exits and 2 ballast entries.

Illustrative Mideast Gulf tanker crossings, 2 to 7 October

Date	Vessel	Type	Direction / state	Cargo	Volume (kb)	Load port	Discharge / next port
2 Oct	MONACO PROSPERITY	VLCC	MEG exit, laden	Crude/Co	2,000	Ras Tanura, Saudi Arabia	Kutch Light, India
2 Oct	NCC MAHA	MR	MEG exit, laden	CPP	321	Jubail, Saudi Arabia	Mumbai, India
3 Oct	GREECE PROSPERITY	VLCC	MEG exit, laden	Crude/Co	1,985	Zirku, UAE	Fujairah, UAE
4 Oct	BNEIDER	LR2	MEG exit, laden	CPP	737	Kuwait	Fujairah, UAE
5 Oct	AL KOUT	VLCC	MEG exit, laden	Crude/Co	2,000	Mina Al-Ahmadi, Kuwait	Fujairah, UAE
6 Oct	TITANIUM SHINE	VLCC	MEG exit, laden	Crude/Co	2,000	Ras Tanura, Saudi Arabia	Quanzhou, China
6 Oct	ANGOLA PROSPERITY	VLCC	MEG entry, ballast	None	0	Not applicable	Ras Tanura, Saudi Arabia
7 Oct	PM DUKE	MR	MEG entry, ballast	None	0	Not applicable	Hamriya, UAE

Illustrative sample, not the full crossing log. Source, Kpler, Strait of Hormuz Tanker Crossings dashboard.

Where AIS coverage lapses, Kpler applies a dark-transit methodology, cross-referencing satellite imagery and human intelligence against a binary confirmation standard before attributing a movement. See the full methodology note at the end of this briefing.

4. Critical infrastructure status

Saudi infrastructure, Petrolina and Yanbu

Saudi Arabia exports from both coasts again after the 10 September attack on the East-West Pipeline. East-West Pipeline flows have recovered to 5.8 mbd, but the threat of further attacks clouds the outlook. Kpler Insight expects Saudi crude supply to average around 9 mbd in October.

Kpler Insight reported on 8 October that tensions between Saudi Arabia and the Houthis may keep Dated Brent bid. The Johan Sverdrup premium has collapsed since the outage. It is now offered below \$6/bbl FOB, after printing above a \$24/bbl premium at the peak.

Indicator	Latest reading
Trigger event	A drone attack on the East-West Pipeline on 10 September halted pipeline flows and Yanbu loadings.
Pipeline status	Flows have recovered to 5.8 mbd, but the threat of further attacks clouds the outlook.
Restoration timeline	Saudi officials say operations resumed 5 to 6 days after the strike. Confirmed Red Sea loadings restarted on 17 September.
Estimated export exposure	Saudi crude supply is expected to average around 9 mbd in October, against 12 mbd of maximum capacity.
Yanbu terminal inventories	On-land crude stocks at Yanbu were 16.17 mb on 4 October, up about 2 mb since 24 September.
Grade mix effect	Johan Sverdrup printed above a \$24/bbl premium to Dated at the peak of the outage. It is now offered below \$6/bbl FOB.
East coast pivot	Saudi Arabia exports from both coasts again. Kpler Insight reports lower official selling prices for November Saudi crude in Asia.
European cargo cancellations	Cancelled or deferred Saudi term cargoes for European refiners lifted Johan Sverdrup to a record premium in mid-September.

Sources, Kpler Insight Crude Oil published 8 October 2026, Market Pulse published 6 October 2026, news published 5 October 2026 and The Crude View published 2 October 2026. Kpler internal flow-tracking data.

5. Refined products and bunker fuel impact

Kpler Insight reported on 8 October that France has signalled a diesel emergency reserve release that could reach 50 mb with other European countries. The release is designed to head off a US gasoil export ban, and Kpler expects it to be frontloaded over 4 months. NWE gasoil cracks fell about \$17/bbl on the week and Mediterranean cracks about \$15/bbl.

EU member states agreed they are not obliged to release more stock than the emergency allocations authorised in March. Only France has said it would release product volumes imminently. Kpler Insight reported on 7 October that refined products added 2.22% to trend-following fund returns in the third quarter.

ICE gasoil fell 7.3% in the latest weekly report, the steepest loss in the energy complex. Singapore fuel oil rose 4.6% against the trend, because it sat outside the scope of the release.

Benchmark	Weekly move	Note
ICE gasoil	-7.3%	Steepest loss in the energy complex after the G7 and IEA stock release targeted distillate.
Heating oil futures	-3%	Fell less than gasoil, which strengthened the heating oil to gasoil spread.
RBOB gasoline	-2.4%	Tracked crude lower rather than the diesel reset.
Brent	-2%	Crude barely priced the release because the supply recovery was already in the price.
WTI	-1.4%	Trend funds held around 91% long, which cushioned the decline.
NWE naphtha	+1.5%	Sits outside the scope of the release.
Singapore fuel oil	+4.6%	Rose against the trend, outside the scope of the release.

Source, Kpler Insight, Cross Commodity Weekly published 5 October 2026, based on Marketview pricing data.

6. Sources and notes

This briefing draws exclusively on Kpler Insight research and Kpler platform data. No external or third-party sources were used.

Kpler Insight citations

- Johannes Rauball, Naveen Das and Muyu Xu, “Intensified tanker strikes renew Middle Eastern supply concerns”, Crude Oil, published 8 October 2026. <https://terminal.kpler.com/insight/research/reports/intensified-tanker-strikes-renew-middle-eastern-supply-concerns>
- Yui Torikata, “Fujairah crude loadings hit a record 2.62 mbd in September, how the numbers add up”, Kpler Insight news, published 8 October 2026. <https://terminal.kpler.com/insight/news/fujairah-crude-loadings-hit-a-record-2-62-mbd-in-september-how-the-numbers-add-up>
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- Florian Grünberger, “CTA Q3 Performance, Refined products lead commodity returns as precious metals weigh”, Market Pulse, published 7 October 2026. <https://terminal.kpler.com/insight/research/research-updates/cta-q3-performance-refined-products-lead-commodity-returns-as-precious-metals-weigh>
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- Nhway Khin Soe and Yui Torikata, “Saudi Red Sea Exports Resilience, Yanbu and Muajjiz Loadings Hit 42 mb Post-Pipeline Restart”, Kpler Insight news, published 5 October 2026. <https://terminal.kpler.com/insight/news/saudi-red-sea-exports-resilience-yanbu-and-muajjiz-loadings-hit-42-mb-post-pipeline-restart>
- Johannes Rauball, “Seven months on, 2 bn bbl lost, 5 Mbd still offline, and no deal in sight”, Market Pulse, published 6 October 2026. <https://terminal.kpler.com/insight/research/research-updates/seven-months-on-2-bn-bbl-lost-5-mbd-still-offline-and-no-deal-in-sight-1>
- Homayoun Falakshahi, Johannes Rauball, Muyu Xu and Naveen Das, “Mideast Gulf flows return, differentials soften, risk premium stays”, The Crude View, published 2 October 2026. <https://terminal.kpler.com/insight/research/reports/mideast-gulf-flows-return-differentials-soften-risk-premium-stays>

Kpler platform data

- Kpler Insight search API (reports and short-form content), published-by-date range from 7 October to 9 October 2026. Uses a 48-hour rolling window on Wednesday to Friday editions, extended back to the prior Friday on Monday and Tuesday editions to include weekend publications.
- Kpler internal flow-tracking data, “Middle East Regional Flows” measures (Total Hormuz Clearance and Strait of Hormuz Tanker Crossings panel), flow data to 7 October 2026, compiled by the Insight team.
- Kpler, Strait of Hormuz Tanker Crossings dashboard, illustrative vessel sample, 2 to 7 October 2026.

Positioning note

Kpler Insight reported on 7 October that trend-following funds moved from 9% short to 82% long in Brent and WTI over the third quarter. Gasoil prices gained 88.7% over the same period.

Standing methodology note, vessel and cargo tracking

Kpler compiles vessel and cargo tracking data from 3 complementary sources. Automatic Identification System (AIS) signals form the backbone, providing real-time position data whenever a vessel's transponder is active. A gap in that signal is informative but not conclusive on its own. Satellite imagery, both optical and synthetic aperture radar (SAR), corroborates vessel presence and laden state at terminals and along transit routes. SAR can see through cloud cover

where optical imagery cannot. These streams are supplemented by human intelligence, meaning market sources reporting loading events, ship-to-ship transfer scheduling and port call activity. This intelligence often flags a movement before satellite imagery can confirm it.

The 3 streams are cross-referenced against a binary confirmation standard. An event is recorded only when consistent evidence from more than one source supports it, not through probabilistic attribution or a single source. Where AIS coverage lapses, such as during a dark transit, analysts look for satellite imagery placing a vessel inside a region on one date and outside it on another. They also draw on human intelligence and discharge-side confirmation that corroborates timing and cargo grade. Volumes that cannot be independently verified this way are classified as unknown origin rather than attributed by inference, a deliberately conservative approach that favours accuracy over completeness.

Source, *Middle East and Gulf of Oman dark crude exports methodology*, Kpler Help Centre. <https://help.kpler.com/en/articles/15462913-middle-east-and-gulf-of-oman-dark-crude-exports-methodology>