

Kpler Media Briefing

Middle East Energy and Maritime Disruptions

Flow data as of Sunday, 11 October 2026 (T-2, to reduce day-to-day revision noise)

Prepared Tuesday, 13 October 2026. Kpler Insight and Kpler platform data only

1. Executive summary and key price drivers

Confirmed Total Hormuz Clearance was 2,981 kbd on 11 October, after 4,266 kbd on 10 October and 7,539 kbd on 9 October. Daily readings swing widely, from 20,131 kbd on 8 October to 2,981 kbd on 11 October. The 7-day average of 9,748 kbd sits about 43% below the pre-war baseline of 17,143 kbd. The latest days are preliminary and have typically settled 1.5 to 2 times higher as confirmations land. Adding Gulf of Oman terminals and the Red Sea lifts the regional 7-day average to 17,636 kbd, about 24% below its baseline. Kpler Insight reported on 9 October that tanker attacks reached their highest weekly count this year. It also reported record Middle East to China VLCC rates of \$38.47/bbl. Saudi Arabia exports from both coasts again, with East-West Pipeline flows around 5.8 mbd according to Kpler Insight on 12 October.

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.

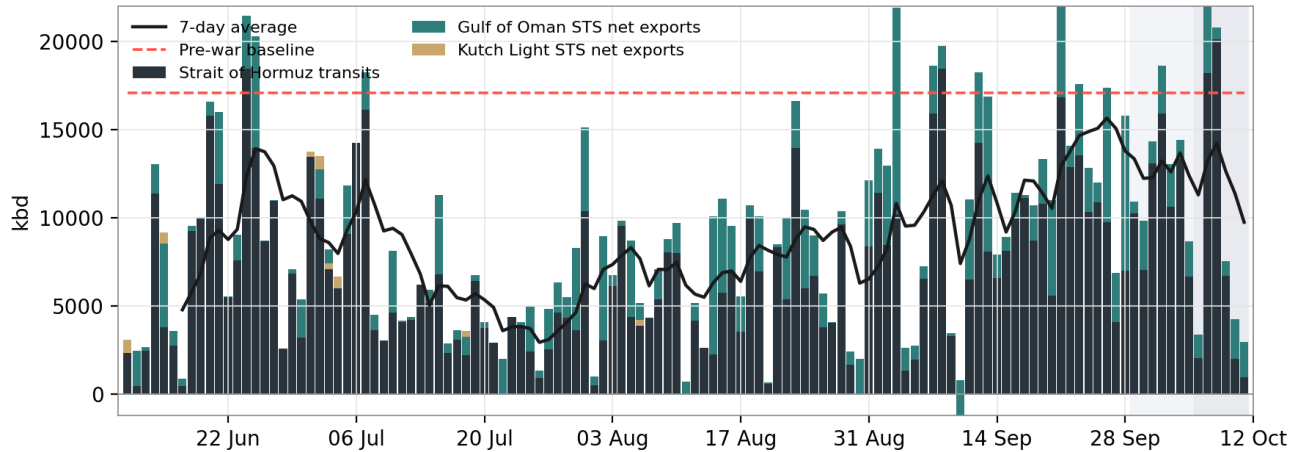
Middle East Regional Flows (kbd)

Middle East Regional Flows (kbd)	11 Oct	10 Oct	9 Oct	8 Oct	7-day MA	Pre-War Baseline
Strait of Hormuz Transits	981	2,000	6,691	20,774	8,482	17,143
Gulf of Oman STS Net Exports	2,000	2,266	848	-643	1,266	0
Kutch Light STS Net Exports	0	0	0	0	0	0
1. Total Hormuz Clearance	2,981	4,266	7,539	20,131	9,748	17,143
Crude	2,981	3,762	6,030	19,804	9,115	13,497
Products	0	504	1,509	327	634	3,591
Fujairah & Oman Terminals	2,888	4,120	6,940	37	4,299	3,414
2. + Gulf of Oman Terminals	5,869	8,385	14,479	20,168	14,048	20,502
Crude	4,966	5,804	11,067	19,804	12,029	15,670
Products	904	2,581	3,412	364	2,019	4,832
Red Sea (Saudi + Unattributed)	884	3,457	1,057	1,004	3,588	2,803
3. + Red Sea	6,753	11,843	15,536	21,172	17,636	23,305
Crude	4,966	8,518	12,124	19,804	14,951	17,009
Products	1,788	3,325	3,412	1,369	2,685	6,296
Strait of Hormuz Tanker Crossings	2	5	13	19	12	50
Enter MEG	1	4	8	7	6	25
Exit MEG	1	1	5	12	6	25

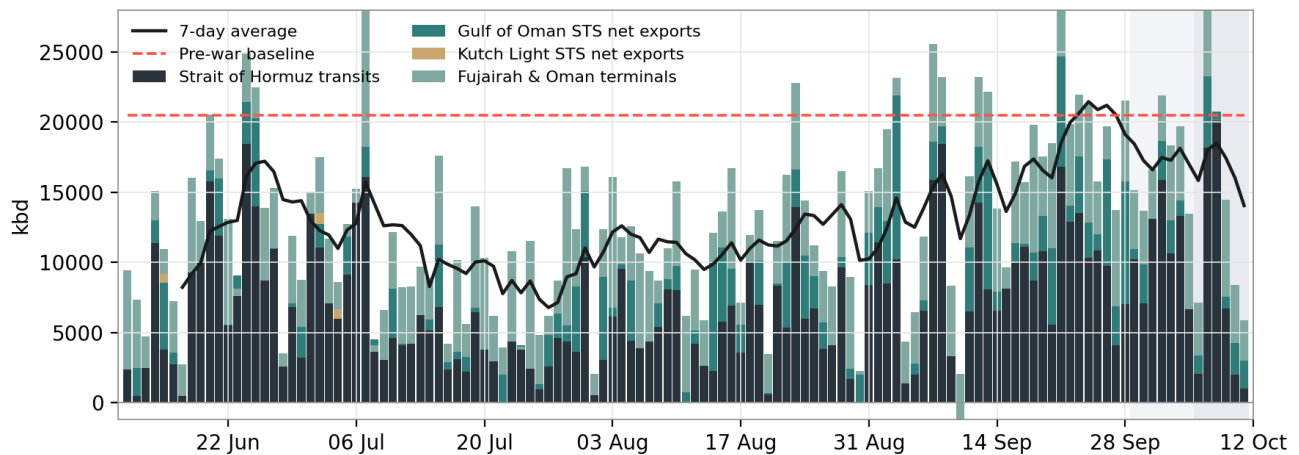
Three cumulative measures of confirmed clearance move outward from the strait itself (1) to Gulf of Oman and Fujairah/Oman terminal loadings (2) and then Red Sea volumes (3). Iranian-origin transits are excluded throughout. Figures are oil only, covering Crude/Co, CPP, DPP and Chem/Bio and excluding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

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

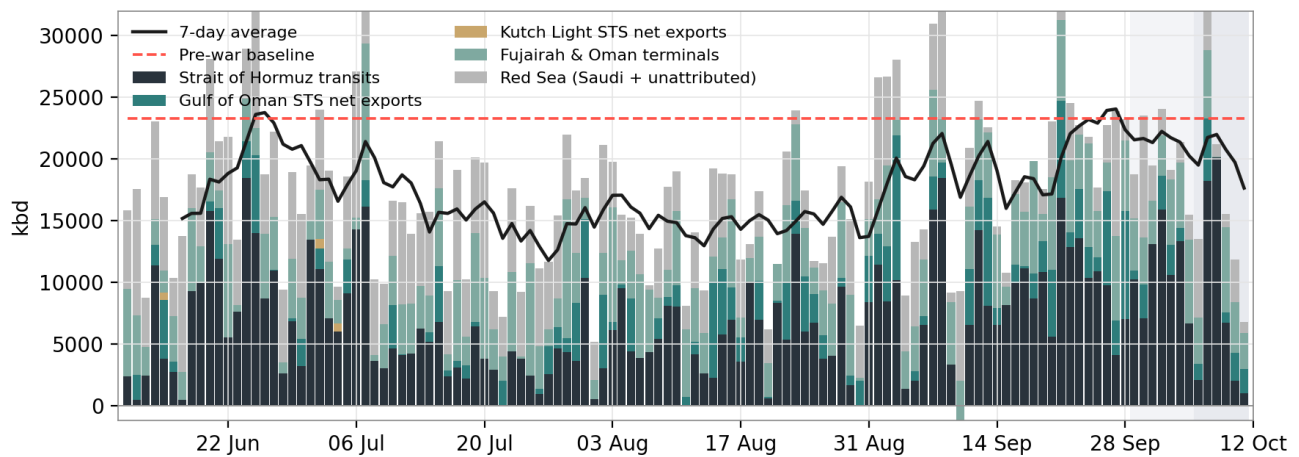
1 • Total Hormuz clearance (kbd)



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

- Tanker attacks reached their highest weekly count this year and keep daily Gulf flows volatile (sections 2 and 3).
- Bypass routes offset part of the loss at the strait, with Fujairah and Oman terminal loadings running above their pre-war baseline (section 2).
- Saudi Arabia exports from both coasts again, and OPEC+ output reached a wartime high in September on a Saudi rebound (sections 2 and 4).
- Iran has not loaded a crude cargo since late August under the US blockade, which keeps buyers competing for other barrels (section 2).
- Freight for Middle East cargoes hit records, and Kpler expects dirty tanker rates to stay elevated through the fourth quarter (section 2).
- Gulf refined product exports trail the crude recovery, while Atlantic gasoil tightness is easing as funds cut length (section 5).

2. Chokepoint and transit metrics

A. Strait of Hormuz

Confirmed strait transits ranged from 981 kbd on 11 October to 20,774 kbd on 8 October, and the latest days are preliminary floors. The 7-day average was 8,482 kbd against a pre-war baseline of 17,143 kbd. Daily readings swing widely because crossings are dated by transit, so the 7-day average is the better guide. Gulf of Oman ship-to-ship net exports were 2,000 kbd on 11 October and 2,266 kbd on 10 October. Fujairah and Oman terminal loadings had a 7-day average of 4,299 kbd, about 26% above the pre-war baseline of 3,414 kbd. Bypass routes therefore continue to offset part of the loss at the strait.

Kpler Insight reported on 9 October that Middle East to China VLCC rates reached a record \$38.47/bbl. More than 70 VLCCs now work in shuttle trades, including more ship-to-ship activity off West Coast India. Kpler expects transits to resume in the coming week, because risk is being priced into freight rather than halting flows.

Iranian-origin transits are excluded from these figures. Kpler Insight reported on 9 October that Iran has not loaded a crude cargo since late August under the US blockade. Chinese teapot refiners are paying up to \$18/bbl over Brent for Basrah crude, which points to missing Iranian barrels.

B. Bab el-Mandeb and Red Sea

Red Sea volumes ranged from 884 kbd on 11 October to 3,457 kbd on 10 October. The 7-day average was 3,588 kbd against a pre-war baseline of 2,803 kbd. Red Sea volumes include cargo with no confirmed load terminal, so the

latest readings are preliminary. Kpler Insight reported on 12 October that optical imagery showed a VLCC and an Aframax at the Yanbu crude terminal on 10 October. The same piece notes Houthi claims of missile and drone strikes on Saudi energy infrastructure in late September and early October.

3. Maritime risk and fleet status

Kpler Insight reported on 9 October that 10 tankers were struck in the strait between 28 September and 4 October. That was the highest weekly count this year, and a further strike followed on 5 October. Kpler data show at least 4 confirmed incidents involving Aframax tankers since 29 September, including one vessel that matches the profile of a clean shuttle tanker. Transits have continued at fluctuating levels. Kpler Insight reads the heightened risk as a bargaining tool for owners seeking higher rates, not a decisive deterrent. Tanker crossings of the strait were 2 on 11 October, 5 on 10 October, 13 on 9 October and 19 on 8 October. The latest day shows 1 entry and 1 exit. The 7-day average of 12 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, 8 to 11 October

Date	Vessel	Type	Direction / state	Cargo	Volume (kb)	Load port	Discharge / next port
11 Oct	VALTHERA	Suezmax	MEG exit, laden	Crude/Co	981	Al Basrah, Iraq	Oman
11 Oct	CENTURIES	VLCC	MEG entry, ballast	Ballast	0	Pelepas Light., Malaysia	Dubai Area, UAE
10 Oct	VIETNAM PROSPERITY	VLCC	MEG exit, laden	Crude/Co	2,000	Ras Tanura, Saudi Arabia	Vadinar, India
10 Oct	THAILAND PROSPERITY	VLCC	MEG entry, ballast	Ballast	0	Gulf of Oman	Ras Tanura, Saudi Arabia
9 Oct	LUCKYRIDE	LR2	MEG exit, laden	DPP	661	Al Zour, Kuwait	Fujairah, UAE
9 Oct	OTTOMAN SINCERITY	Suezmax	MEG exit, laden	Crude/Co	1,030	Mina Al-Ahmadi, Kuwait	Sikka, India
8 Oct	LYRA	MR	MEG exit, laden	DPP and CPP	202	Khor Al Zubair, Iraq	Fujairah, UAE
8 Oct	AL RIQQA	VLCC	MEG exit, laden	Crude/Co	2,000	Mina Al-Ahmadi, Kuwait	Not yet reported

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 attack on the East-West Pipeline in September. Kpler Insight reported on 12 October that pipeline flows are around 5.8 mbd, according to industry sources. Saudi crude output rose to around 8.55 mbd in September from 6.3 mbd in August, according to Kpler data. Exports rose through both Hormuz and Bab el-Mandeb after the repairs. Saudi Arabia's energy ministry said at the World Petroleum Congress that it plans to lift pipeline capacity to 10 mbd from 7 mbd. The expansion could take up to 3 years and would let other countries, including Kuwait, bypass Hormuz. Kpler Insight reported on 12 October that satellite radar showed 4 VLCCs at Juaymah on each of 10 and 12 October. AIS showed 1 large tanker broadcasting there on 10 October and none on 12 October. Satellite imagery and AIS therefore give different counts of the same loadings.

Indicator	Latest reading
Trigger event	A drone attack forced the East-West Pipeline offline in the second week of September.
Pipeline status	Flows are around 5.8 mbd according to industry sources. Current capacity is 7 mbd.
Restoration timeline	West Coast crude exports restarted on 17 September. Kpler inventory assessments show the pipeline operational by at least 22 September.
Yanbu terminal inventories	On-land crude inventories at Yanbu reached 16.17 mb on 4 October, after a further build of some 2 mb.
Export routes	Saudi Arabia exports from both coasts. Crude output rose to around 8.55 mbd in September from 6.3 mbd in August.
Capacity expansion plan	Saudi Arabia plans to lift capacity to 10 mbd from 7 mbd. The expansion could take up to 3 years and could let Kuwait and others bypass Hormuz.

Sources, Kpler Insight news published 5 October and 12 October 2026, and Market Pulse published 12 October 2026.

5. Refined products and bunker fuel impact

Kpler Insight reported on 9 October that Gulf refined product exports recovered to 4 mbd, well below the pre-conflict level of 5.7 mbd. Crude is a single large stream to aggregate and evacuate. Products need 6 or 7 grades, segregated tanks and vessel space to move in step. A single missed ship-to-ship transfer window can delay the whole refinery loading schedule.

Refinery runs also lag. Kpler Insight reported on 11 October that Middle East runs were about 7.4 mbd in September, about 2.1 mbd below a year earlier. Saudi runs fell about 100 kbd month on month to about 2.1 mbd. East-West Pipeline damage curtailed crude supply to West Coast refineries, on top of the Jizan outage that has lasted since late July. Kpler expects Jizan to restart from mid-November and regional runs to recover to about 8.1 mbd in the fourth quarter. That recovery depends on tanker traffic through Hormuz.

Gasoil is softening in the Atlantic Basin. Kpler Insight reported on 11 October that trend-following funds cut gasoil exposure from 91% to 55% long, the lowest since 16 July. ICE gasoil fell 4.1% in the reporting week. France plans to release 10 mb of diesel from reserves between November and January, and a US export ban looks less likely. The G7 announced a 100 mb release of diesel and crude from strategic stocks. Kpler Insight reported on 9 October that US Gulf to UK Continent MR rates fell \$3.2/bbl to \$8.2/bbl as a result. High freight and tight clean tonnage still limit extra supply from East of Suez.

Benchmark	Weekly move	Note
ICE gasoil	-7.3%	Steepest loss in the energy complex, after the G7 stock release targeted distillate.
Heating oil futures	-3%	Fell far less than gasoil, which strengthened the HOGO spread.
RBOB	-2.4%	Tracked crude rather than the diesel reset.
Singapore fuel oil	+4.6%	Rose against the trend because it sat outside the scope of the release.
NWE naphtha	+1.5%	Also 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

- Amena Bakr, “Saudi Rebound Pushes OPEC+ Crude Production to Wartime High”, Market Pulse, published 12 October 2026. <https://terminal.kpler.com/insight/research/research-updates/saudi-rebound-pushes-opeccrude-production-to-wartime-high>
- Yui Torikata, “Saudi Crude Loadings Hold Up as a Handful of Tankers Keep AIS On”, Kpler Insight news, published 12 October 2026. <https://terminal.kpler.com/insight/news/saudi-crude-loadings-hold-up-as-a-handful-of-tankers-keep-ais-on>
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- Homayoun Falakshahi, “Disguising Iranian crude as Iraqi looks highly unlikely under the US blockade”, Market Pulse, published 9 October 2026. <https://terminal.kpler.com/insight/research/research-updates/disguising-iranian-crude-as-iraqi-looks-highly-unlikely-under-the-us-blockade>
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- Alexandre Andlauer, “Gold loses its bid as yields climb”, Cross Commodity Weekly, published 5 October 2026. <https://terminal.kpler.com/insight/research/reports/gold-loses-its-bid-as-yields-climb>

Kpler platform data

- Kpler Insight search API (reports and short-form content), published-by-date range from 9 October to 13 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 11 October 2026, compiled by the Insight team.
- Kpler, Strait of Hormuz Tanker Crossings dashboard, illustrative vessel sample, 8 to 11 October 2026.

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>