

Kpler Media Briefing

Middle East Energy and Maritime Disruptions

Flow data as of Tuesday, 13 October 2026 (T-2, to reduce day-to-day revision noise)

Prepared Thursday, 15 October 2026. Kpler Insight and Kpler platform data only

1. Executive summary and key price drivers

Total Hormuz clearance averaged 11,617 kbd over 7 days to 13 October, about 68% of the 17,145 kbd baseline. Single days were more volatile, ranging from 4,981 kbd on 11 October to 8,433 kbd on 10 October. The Kpler weekly review of 13 October reported that intensified Iranian attacks drove Gulf crude flows sharply lower. Those flows had only just recovered to pre-war levels in late September. Kpler analysts now assume a slower and more uneven Hormuz recovery, without a comprehensive political deal. Saudi Arabia continues to load crude, with satellite imagery showing VLCCs at Juaymah and Yanbu from 10 to 12 October. A strike on the Aramco headquarters in Dhahran late on 13 October caused a fire but no injuries.

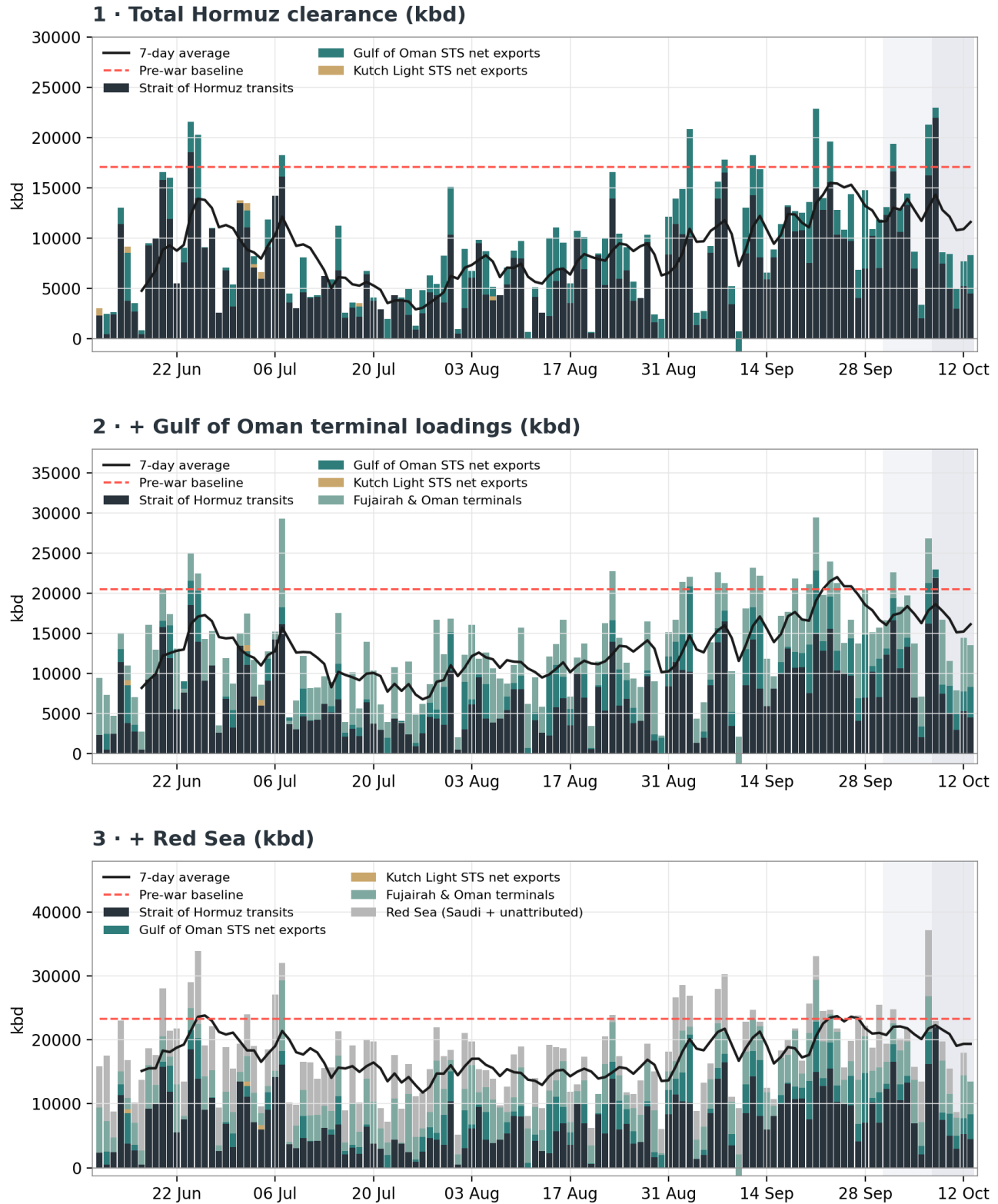
Explore these flows in the new [Middle East Flows dashboard](#) in the Kpler terminal. It brings Strait of Hormuz transits, Gulf of Oman ship-to-ship net exports and Red Sea exports together in one view.

Middle East Regional Flows (kbd)

Middle East Regional Flows (kbd)	13 Oct	12 Oct	11 Oct	10 Oct	7-day MA	Pre-War Baseline
Strait of Hormuz Transits	4,501	5,260	2,981	5,005	9,203	17,145
Gulf of Oman STS Net Exports	3,830	2,476	2,000	3,428	2,414	0
Kutch Light STS Net Exports	0	0	0	0	0	0
1. Total Hormuz Clearance	8,331	7,736	4,981	8,433	11,617	17,145
Crude	6,990	6,622	4,981	8,758	10,810	13,485
Products	1,342	1,115	0	-325	806	3,604
Fujairah & Oman Terminals	5,164	6,721	2,888	3,128	4,517	3,414
2. + Gulf of Oman Terminals	13,496	14,457	7,869	11,561	16,134	20,503
Crude	11,081	11,854	6,966	10,801	13,960	15,658
Products	2,414	2,603	904	760	2,174	4,845
Red Sea (Saudi + Unattributed)	0	3,510	884	3,986	3,251	2,803
3. + Red Sea	13,496	17,967	8,753	15,547	19,385	23,307
Crude	11,081	13,997	6,966	13,514	16,519	16,997
Products	2,414	3,970	1,788	2,033	2,866	6,309
Strait of Hormuz Tanker Crossings	4	8	9	11	13	50
Enter MEG	0	4	7	8	7	25
Exit MEG	4	4	2	3	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 13 October



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

- Renewed attacks around Hormuz are holding clearance below pre-war levels, and section 2 sets out the transit measures.
- Asian buyers are pulling in prompt Middle East barrels as Gulf cargoes arrive, with Chinese stocks drawing at a record pace. Section 2 has the detail.
- Attacks on Saudi sites continue, including the Aramco headquarters strike, while section 4 tracks the recovery of the East-West Pipeline and Yanbu.
- Freight and tanker scarcity keep delivered crude costs high, and sections 3 and 5 cover the vessel picture and the policy options.
- Diesel tightness and stock release policy are driving refined products, and section 5 covers the weekly benchmark moves.

2. Chokepoint and transit metrics

A. Strait of Hormuz

Strait of Hormuz transits, excluding Iranian-origin vessels, were 4,501 kbd on 13 October. The 7-day average was 9,203 kbd, against a pre-war level of 17,145 kbd. Gulf of Oman ship-to-ship net exports added 3,830 kbd on 13 October. Their 7-day average was 2,414 kbd, against a pre-war baseline of 0 kbd.

Strait tanker crossings fell to 4 on 13 October, against a 7-day average of 13 and a pre-war level of 50. All 4 were exits from the Mideast Gulf, and none entered. Daily totals are confirmed floors and typically revise upward as confirmations land.

Arrivals in Asia tell a different story, because they reflect barrels that left the Gulf in September. Asia imported 26 mbd of crude from 1 to 14 October, within 1% of its pre-war average of 26.2 mbd. Chinese buyers are active too. Kpler estimates they secured at least 80 mb of Saudi crude on the spot market since mid-September. Even so, Chinese seaborne imports remain 2.4 mbd below pre-war levels. About 1 mbd of Iranian supply has been lost under the US blockade.

B. Bab el-Mandeb and Red Sea

Red Sea volumes in the flow panel were 3,510 kbd on 12 October and 884 kbd on 11 October. The reading for 13 October is 0 kbd and remains preliminary. The 7-day average of 3,251 kbd compares with 2,803 kbd before the war. Confirmed Saudi cargoes made up 85% of the crude delivered into the Sumed pipeline at Ain Sukhna from 1 to 14 October. About 1 mbd loaded at Sidi Kerir, the Mediterranean end of Sumed, mostly bound for South Korea and Japan.

3. Maritime risk and fleet status

Kpler Insight reported a strike on the Aramco administrative building in Dhahran late on Tuesday 13 October. It described the strike as a Houthi attack. A source at the Saudi energy ministry confirmed there were no injuries or fatalities. Sources told Kpler that the top 3 floors were hit and a fire followed. Kpler reported no direct implications for oil markets, because the attack did not affect anything beyond the headquarters building. The weekly review of 13 October also cited record tanker attacks around Hormuz. Kpler classed all 32 tanker crossings from 10 to 13 October as dark or unknown route transits. The table shows 8 of them.

Illustrative Mideast Gulf tanker crossings, 10 to 13 October

Date	Vessel	Type	Direction / state	Cargo	Volume (kb)	Load port	Discharge / next port
13 Oct	UQAB	VLCC	MEG exit, laden	Crude/Co	1,990	Ras Tanura, Saudi Arabia	Not yet reported
13 Oct	SERENO	MR	MEG exit, laden	CPP	511	Jubail Industrial Port, Saudi Arabia	Not yet reported
12 Oct	OTTOMAN EQUITY	Suezmax	MEG exit, laden	Crude/Co	1,033	Al Basrah, Iraq	Sikka, India
12 Oct	ZEFYROS	MR	MEG exit, laden	CPP	338	Ras Tanura, Saudi Arabia	Huizhou, China
12 Oct	SEA V	VLCC	MEG entry, ballast	None	0	Not applicable	Al Basrah, Iraq
11 Oct	JAMAICA PROSPERITY	VLCC	MEG exit, laden	Crude/Co	2,000	Ras Tanura, Saudi Arabia	Sohar, Oman
11 Oct	SANAM	VLCC	MEG entry, ballast	None	0	Not applicable	Ras Tanura, Saudi Arabia
10 Oct	ELENI	Suezmax	MEG exit, laden	Crude/Co	1,005	Khafji, Saudi-Kuwaiti Neutral Zone	Zhoushan, China

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, Petroline and Yanbu

Kpler Insight reports that an attack on 10 September damaged a pumping station on the East-West Pipeline, also called Petroline. Kpler saw signs that Aramco was laying a bypass around the damaged station, and it initially assessed full repairs at 4 to 6 weeks. Loadings at Yanbu and Muajjiz resumed on 17 September, and confirmed west coast loadings reached 42 mb by 4 October.

Saudi exports also pivoted east. Juaymah and Ras Tanura supplied 2.5 mbd of Saudi crude imported into Asia so far in October, against 1 mbd in September. Satellite imagery showed 4 VLCCs at Juaymah on both 10 and 12 October. It also showed a VLCC and an Aframax at Yanbu on 10 October. The Aramco headquarters strike of 13 October is the latest in a run of Houthi attacks on Saudi sites.

Indicator	Latest reading
Trigger event	An attack on 10 September damaged a pumping station on the East-West Pipeline, also called Petroline. Yanbu loadings then stalled.
Pipeline status	Operating again. Kpler inventory data showed the pipeline running by 22 September, and a reading on 4 October confirmed it.
Restoration timeline	The initial assessment was 4 to 6 weeks for full repairs. Loadings resumed on 17 September, and 42 mb loaded from west coast terminals by 4 October.
Estimated export exposure	The pipeline ran at an estimated 5.4 to 5.5 mbd before the attack. Every 10 percentage points of recovered capacity adds about 540 kbd to Yanbu export capability.
Yanbu terminal inventories	Inventories fell to about 9 mb on 10 September, the lowest since 2018. The reading on 4 October was 16.17 mb.
Grade mix effect	The barrels at risk were mainly Dubai basket medium sour grades. The pipeline normally feeds about 1.5 mbd of mainly Arab Light and Arab Heavy to western refineries.
East coast pivot	Ras Tanura exports reached 2.99 mbd in the week to 20 September, while Yanbu fell to 429 kbd. Satellite imagery showed 4 VLCCs at Juaymah on both 10 and 12 October.

Sources, Kpler Insight coverage of the East-West Pipeline published from 11 September to 14 October 2026, and Kpler internal flow-tracking data.

5. Refined products and bunker fuel impact

Refined products led the energy rally in the latest weekly review, with gasoil up 9.5% against a 2.4% rise for Brent. Kpler Insight attributes the move to policy rather than new demand, after EU member states declined to add to earlier stock releases. Only France committed product volumes, with 10 mb of diesel from November to January. Kpler estimates the global diesel deficit at around 1 mbd as peak seasonal demand begins.

Diesel prices are approaching \$200/bbl, and gasoil cracks sit around \$80 to \$90/bbl. Singapore fuel oil rose 7.4% as scarce cutter stocks kept high sulphur fuel oil (HSFO) in backwardation. The revised Hormuz base case lengthens Q4 2026 balances. Gasoil and diesel were revised up by about 950 kbd and jet by 60 kbd. Gasoline and naphtha balances lengthen by around 180 kbd and 30 kbd.

Freight is now the linchpin for lower prices. Kpler Insight estimates that tanker scarcity explains roughly half of the current freight premium. It also estimates that a temporary relaxation of IMO marine sulphur rules could free 600 kbd to 1 mbd of distillate.

Benchmark	Weekly move	Note
Brent	+2.4%	A modest move given the headlines. Physical tightness concentrated at the very prompt, with Forties above \$20/bbl over Dated Brent.
Gasoil	+9.5%	Led the complex on a policy reversal rather than new demand. EU member states refused any obligation to add to earlier stock releases.
Singapore fuel oil	+7.4%	Scarce cutter stocks kept high sulphur fuel oil in backwardation.
Naphtha NWE	+5.7%	Low ARA stocks and higher delivered freight supported the move.
RBOB gasoline	-0.5%	US gasoline yields recovered and supply lengthened into winter.

Source, Kpler Insight Cross Commodity Weekly, published 13 October 2026.

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

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Kpler platform data

- Kpler Insight search API (reports and short-form content), published-by-date range from 13 October 2026 to 15 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 13 October 2026, compiled by the Insight team.
- Kpler, Strait of Hormuz Tanker Crossings dashboard, illustrative vessel sample, 10 to 13 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>