

Kpler Media Briefing

Middle East Energy and Maritime Disruptions

Flow data as of Wednesday, 14 October 2026 (T-2, to reduce day-to-day revision noise)

Prepared Friday, 16 October 2026. Kpler Insight and Kpler platform data only

1. Executive summary and key price drivers

Confirmed Total Hormuz Clearance was 7,628 kbd on 14 October. The latest 4 days ranged from 4,981 kbd to 11,066 kbd. The 7-day average of 10,255 kbd sits about 40% below the pre-war baseline of 17,175 kbd. Adding Gulf of Oman terminals and the Red Sea lifts the regional 7-day average to 16,441 kbd, about 30% below its baseline. Kpler Insight reports that intensified attacks on commercial vessels cut Gulf crude flows sharply this week. A Houthi strike hit the Aramco headquarters in Dhahran late on 13 October, with no injuries and no direct implications for oil markets. Meanwhile, Asian crude imports reached 26 mbd from 1 to 14 October, within 1% of the pre-war average, as earlier Gulf cargoes arrive.

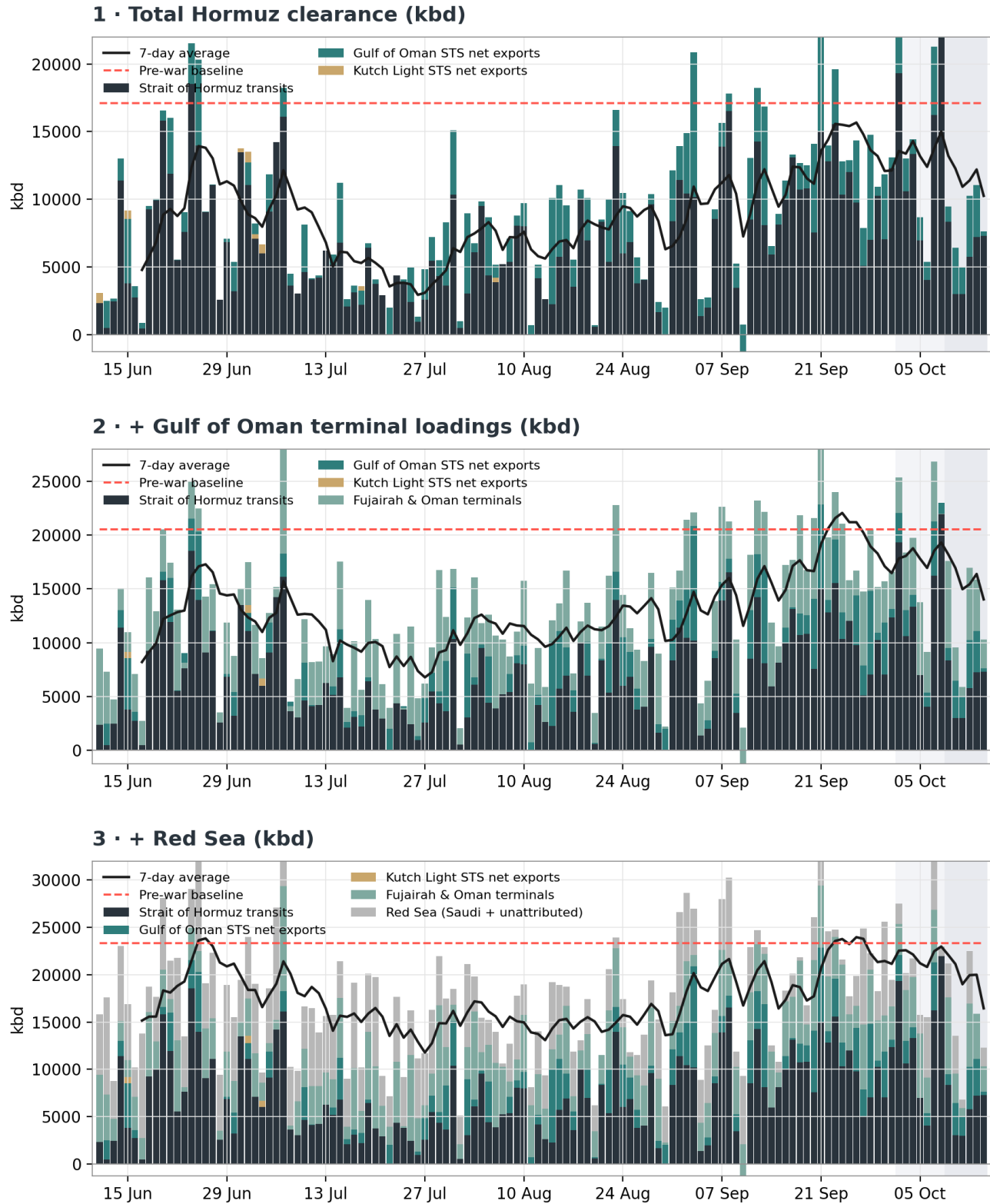
Explore these flows in the new [Middle East Flows dashboard](#) in the Kpler terminal. It brings Strait of Hormuz transits, Gulf of Oman ship-to-ship net exports and Red Sea exports together in one view.

Middle East Regional Flows (kbd)

Middle East Regional Flows (kbd)	14 Oct	13 Oct	12 Oct	11 Oct	7-day MA	Pre-War Baseline
Strait of Hormuz Transits	7,300	7,236	5,772	2,981	8,232	17,175
Gulf of Oman STS Net Exports	327	3,830	4,476	2,000	2,023	0
Kutch Light STS Net Exports	0	0	0	0	0	0
1. Total Hormuz Clearance	7,628	11,066	10,248	4,981	10,255	17,175
Crude	7,037	9,725	8,622	4,981	9,390	13,512
Products	591	1,342	1,627	0	865	3,607
Fujairah & Oman Terminals	2,677	4,773	6,721	904	3,765	3,414
2. + Gulf of Oman Terminals	10,305	15,839	16,969	5,885	14,020	20,533
Crude	9,112	13,816	13,854	4,981	12,030	15,686
Products	1,193	2,023	3,115	904	1,991	4,848
Red Sea (Saudi + Unattributed)	2,000	0	5,510	884	2,421	2,803
3. + Red Sea	12,305	15,839	22,479	6,769	16,441	23,336
Crude	11,112	13,816	17,997	4,981	13,732	17,025
Products	1,193	2,023	4,482	1,788	2,709	6,311
Strait of Hormuz Tanker Crossings	10	4	11	9	12	50
Enter MEG	2	0	6	7	6	25
Exit MEG	8	4	5	2	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 14 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

- Intensified attacks on commercial vessels keep clearance well below pre-war levels, and sections 2 and 3 set out the transit and fleet picture.
- Bypass routes offset part of the loss, with Fujairah and Oman terminal loadings about 10% above their pre-war baseline (section 2).
- Saudi exports are shifting back towards the Gulf coast after the East-West Pipeline attack, while Houthis strikes on Saudi sites continue (sections 3 and 4).
- Asian arrivals are back near pre-war levels as Gulf cargoes land, while China draws down its crude stocks at a record pace (section 2).
- Iran has not loaded a crude or condensate cargo since 25 August under the US blockade. Kpler Insight expects its crude revenues to fall close to zero by mid-December (section 2).
- Record freight and tanker scarcity lift delivered crude costs, and Kpler expects sanctions relief for shadow fleet tankers to do little to help (sections 3 and 5).
- Diesel stays tight, while a revised Hormuz base case lengthens Q4 balances and stock releases add prompt supply (section 5).

2. Chokepoint and transit metrics

A. Strait of Hormuz

Confirmed strait transits, excluding Iranian-origin vessels, were 7,300 kbd on 14 October. The 7-day average was 8,232 kbd, against a pre-war baseline of 17,175 kbd. Daily readings are preliminary floors and typically revise upward as confirmations land.

Gulf of Oman ship-to-ship net exports were 327 kbd on 14 October, after 3,830 kbd on 13 October. Their 7-day average of 2,023 kbd compares with a pre-war level of 0 kbd. Fujairah and Oman terminal loadings were 2,677 kbd on 14 October. Their 7-day average of 3,765 kbd is about 10% above the pre-war baseline of 3,414 kbd. Bypass routes therefore continue to offset part of the loss at the strait.

Kpler Insight reports that provisional data show crude flows through Hormuz falling to around 8.5 mbd on a 7-day average this week, from over 20 mbd the week before. It also reports at least 10 confirmed incidents involving commercial vessels this week. Kpler analysts now assume a slower and more uneven recovery in tanker traffic, and the revised base case no longer depends on a comprehensive political agreement.

Arrivals in Asia 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. China imports 2.4 mbd less than before the war and is drawing down stocks at a record pace. Kpler estimates that Chinese buyers secured at least 80 mb of Saudi crude on the spot

market since mid-September. In September, bypass supply from Fujairah and Oman covered 48% of Singapore crude imports, according to Kpler Insight.

Iran has not loaded a crude or condensate cargo since 25 August, and its oil on water outside the blockade zone has fallen to zero. Kpler Insight puts Iraqi crude and condensate output at 3.6 mbd in September, up from 3.2 mbd in August. Aramco has cut November official selling prices to Asia to a 6-year low, according to Kpler Insight, as record freight pushes Gulf sellers to compete on price.

B. Bab el-Mandeb and Red Sea

Red Sea volumes were 2,000 kbd on 14 October, after 0 kbd on 13 October and 5,510 kbd on 12 October. The 7-day average of 2,421 kbd compares with a pre-war baseline of 2,803 kbd, about 14% below. Red Sea volumes include cargo with no confirmed load terminal, so the latest readings are preliminary.

Kpler Insight provisional data show Yanbu crude loadings slowed to around 668 kbd this week, from 3.1 mbd last week. Ras Tanura loadings climbed to 6.25 mbd from 3.57 mbd, as Saudi Arabia shifts exports back to its Gulf coast amid Houthi threats. Sumed remains an important route, and confirmed Saudi cargoes made up 85% of the crude delivered into the 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 Houthi strike on the Aramco administrative building in Dhahran late on Tuesday 13 October. 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 strike did not affect anything beyond the headquarters building. Aramco maintains back-up facilities for its critical planning and scheduling functions, which are based in Dhahran.

Kpler Insight reports at least 10 confirmed incidents involving commercial vessels this week. Strait tanker crossings were 10 on 14 October, against a 7-day average of 12 and a pre-war level of 50. The latest day shows 2 entries and 8 exits. Kpler classed 30 of the 32 oil tanker crossings from 11 to 14 October as dark or unknown route transits. The table shows 8 of them.

Freight is the other pressure point. Kpler Insight reports that hauling 2 mb of crude from the Gulf of Oman to Northeast Asia now costs around \$22/bbl, against less than \$10/bbl a month ago. Kpler expects reported US sanctions relief for shadow fleet tankers to have virtually no impact on the tanker crisis. War risk, not vessel availability, is the dominant driver of record rates. Just 46 of around 160 OFAC-designated VLCCs are under 20 years old, and about 24 could realistically rejoin global trade.

Illustrative Mideast Gulf tanker crossings, 11 to 14 October

Date	Vessel	Type	Direction / state	Cargo	Volume (kb)	Load port	Discharge / next port
14 Oct	AJWAD	VLCC	MEG exit, laden	Crude/Co	2,000	Ras Tanura, Saudi Arabia	Lianyungang, China
14 Oct	SEDEF	MR	MEG exit, laden	DPP	264	Khor Al Zubair, Iraq	Not reported
14 Oct	CRONUS	Suezmax	MEG entry, ballast	None	0	Not applicable	Not reported
13 Oct	UQAB	VLCC	MEG exit, laden	Crude/Co	1,990	Ras Tanura, Saudi Arabia	Ningbo, China
13 Oct	SERENO	MR	MEG exit, laden	CPP	511	Jubail, Saudi Arabia	Not reported
12 Oct	NISSOS KYTHNOS	VLCC	MEG exit, laden	Crude/Co	1,902	Al Basrah, Iraq	Fujairah, United Arab Emirates
12 Oct	OTTOMAN EQUITY	Suezmax	MEG exit, laden	Crude/Co	1,033	Al Basrah, Iraq	Sikka, India
11 Oct	BANGLADESH PROSPERITY	VLCC	MEG entry, ballast	None	0	Not applicable	Ras Tanura, Saudi Arabia

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

An attack on 10 September damaged a pumping station on the East-West Pipeline, also called Petroline. Kpler first assessed repairs at 4 to 6 weeks, but loadings at Yanbu and Muajiz restarted on 17 September. Confirmed west coast loadings reached 42 mb by 4 October. The pipeline was running at around 5.8 mbd on 12 October, according to industry sources, against 5.4 to 5.5 mbd before the attack.

Saudi output has recovered strongly. Kpler estimates wellhead production at 8.96 mbd in September, up from 6.63 mbd in August and below the 10.5 mbd of February. Kpler Insight expects 9.3 mbd in October and 9.5 mbd by December. Saudi crude and condensate loadings averaged 7.12 mbd in September.

The strike on Dhahran underlines the exposure of Saudi infrastructure. Kpler Insight notes that the export recovery remains vulnerable to Houthi attacks on energy sites. The Saudi energy ministry plans to lift pipeline capacity to 10 mbd from 7 mbd, which could take up to 3 years.

Indicator	Latest reading
Trigger event	An attack on 10 September damaged a pumping station on the East-West Pipeline, also called Petroline. The line itself sustained little damage.
Pipeline status	Kpler inventory assessments show the pipeline operational by 22 September. Flows were around 5.8 mbd on 12 October, according to industry sources, against 5.4 to 5.5 mbd before the attack.
Restoration timeline	Kpler first assessed full repairs at 4 to 6 weeks. Loadings at Yanbu and Muajjiz restarted on 17 September, within 1 week of the attack.
Estimated export exposure	The Kpler September base case saw throughput at about half of pre-attack rates, cutting Yanbu exports by 2.5 to 2.7 mbd. On provisional data, Yanbu loadings slowed to around 668 kbd this week from 3.1 mbd last week.
Yanbu terminal inventories	Kpler assessments put west coast crude inventories at 16.17 mb on 4 October. Confirmed west coast loadings reached 42 mb between 17 September and 4 October.
Grade mix effect	The pipeline feeds about 1.5 mbd of mainly Arab Light and Arab Heavy to western refineries. The barrels at risk are Dubai basket medium sour grades.
East coast pivot	Ras Tanura loadings climbed to 6.25 mbd this week from 3.57 mbd last week, on provisional data. Juaymah and Ras Tanura supplied 2.5 mbd of Saudi crude imported into Asia from 1 to 14 October, against 1 mbd in September.

Sources, Kpler Insight publications dated 11 September, 14 September, 22 September, 5 October, 12 October, 14 October and 15 October 2026, and Kpler internal flow-tracking data.

5. Refined products and bunker fuel impact

Diesel stays the tightest part of the barrel. Gasoil rose 9.5% in the week to 9 October against 2.4% for Brent, after EU states declined to add to March stock releases. Kpler Insight attributes the move to policy rather than new demand. Kpler estimates the global diesel deficit at around 1 mbd as peak seasonal demand begins.

The revised Hormuz base case lengthens Q4 balances. Gasoil and diesel balances were revised up by about 950 kbd and jet by 60 kbd. G7 stock releases and a resumption of Russian diesel exports add prompt supply in the West. Kpler Insight expects the spread between East of Suez and West of Suez diesel to narrow.

The Houthis strike on Dhahran did not change trade flows. It does underline the threat to Bab el-Mandeb, where over 100 kbd of diesel bound for the Mediterranean transits. Clean product exports from the Middle East stalled in mid-September as attacks on tankers intensified.

Fuel oil also stays tight. Singapore fuel oil rose 7.4% as scarce cutter stocks kept high sulphur fuel oil in backwardation. Kpler Insight expects support for East of Suez fuel oil to persist amid uncertain Middle East and Russian exports. Kpler revised Middle East fuel oil supply up by about 40 kbd in Q4 to 1.6 mbd, led by higher runs in Kuwait.

Kuwait is slowly returning to the bunker market. The LR2 Luckyride lifted a second post-war VLSFO cargo of about 100 kt at Mina Al Zour around 5 October and discharged at Fujairah on 10 October. Singapore VLSFO bunker sales rose 1.1% to 2.22 mt in September, while HSFO sales fell 4.9% to 1.99 mt.

Benchmark	Weekly move	Note
Brent	+2.4%	A modest move given record tanker attacks around Hormuz. Physical tightness concentrated at the very prompt.
Gasoil	+9.5%	Policy drove the move after EU states declined to add to March stock releases. Only France committed product volumes, with 10 mb of diesel from November to January.
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 lifted prices.
RBOB gasoline	-0.5%	US gasoline yields recovered and supply lengthened into winter.

Sources, Kpler Insight, Cross Commodity Weekly published 13 October 2026 and covering the week to 9 October, based on Marketview pricing data. Refined Products, Bottom of the Barrel Monthly and Middle of the Barrel Monthly published 14 and 15 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.

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Kpler platform data

- Kpler Insight search API (reports and short-form content), published-by-date range from 14 October to 16 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 14 October 2026, compiled by the Insight team.
- Kpler, Strait of Hormuz Tanker Crossings dashboard, illustrative vessel sample, 11 to 14 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>