

US–Iran Conflict Briefing

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Oil surges again as pipeline repair timeline emerges

- Brent crude rose 1.8% to \$107.59 a barrel and WTI gained 1.9% to \$103.30 in early Tuesday European trading — above Monday's settlements (\$105.68 / \$101.39) but below Monday's intraday highs (\$109.80 / \$104.35). — [Wall Street Journal](#)
- Saudi Arabia hopes to resume partial operations on the 750-mile East-West Pipeline within days, but damaged pumping stations could take six to eight weeks to fully repair. The line can carry up to 7 million barrels a day to Yanbu, bypassing Hormuz. — [Wall Street Journal](#)
- Rystad's Janiv Shah estimates Yanbu's stored crude covers roughly three days of exports, with another week possible by drawing on crude stored in Egypt. LSEG data show Yanbu loadings fell to 1.1M bpd in August versus 4M+ bpd in April–June, as Houthi Red Sea attacks deterred traffic. — [Wall Street Journal](#)
- Commonwealth Bank's Vivek Dhar says global crude and product inventories give only five to eleven weeks of cover; China's crude imports are edging higher. — [Wall Street Journal](#)
- US diesel hit a fresh record \$6.27 a gallon on Tuesday, per AAA; US oil executives warned a 'global fuel crisis has arrived' as commercial fuel stocks deplete and strategic reserves run low. — [Wall Street Journal](#)

Container lines expand Red Sea transits despite Houthi grip

- Maersk said Monday that it and Gemini Cooperation partner Hapag-Lloyd will return four more services linking Asia, the Mediterranean and Europe to the Suez route, joining two returned earlier this year — even as the Houthis tightened control of the Bab el-Mandeb chokepoint. — [Wall Street Journal](#)
- MSC resumed some transits last month; Cosco and OOCL are also returning, per Linerlytica data; CMA CGM began resuming late last year. Maersk says it will 'closely monitor' security. — [Wall Street Journal](#)

Gulf stocks slide on Houthi assault and Hormuz slump

- Saudi Arabia's TASI fell 0.8% in early Tuesday trade (Al Rajhi Bank –0.8%, Saudi Aramco –0.5%); Dubai's DFMGI and Abu Dhabi's FTFADGI each fell 0.2%, and Qatar's QSI fell 0.3% — on the fresh Houthi assault and the Hormuz shipping slump. — [Reuters](#)

Riyadh deliberates as Houthis dig in; retaliation risk rising

- Reuters reports the Houthis launched 'a new wave of attacks on Saudi Arabia' and are digging into positions on Yemen's western Red Sea coast, while 'urgent deliberations' are underway in Riyadh over how to respond. Saudi and Yemeni air forces stepped up bombardment around Mokha, but the Houthis 'maintained effective control over almost the entire western coast,' per Yemeni officials. — [Reuters](#)
- Houthi media reported capturing Saudi-recruited fighters on the Hanish Islands, about 160 km north of Bab el-Mandeb — a Houthi-media claim, not independently verified. — [CNN](#)

- Analyst Mohammed Al-Basha: 'All signs now point to a large-scale Saudi retaliation, and that likelihood is increasing by the day.' — [CNN](#)
- Trump said over the weekend that the Houthis had contacted Washington urging it to stay out of the conflict. Three sources told Reuters Washington has so far resisted Saudi requests for direct military intervention beyond intelligence support. — [Reuters](#)

Inside the Houthi lightning offensive

- Abdulmalik al-Houthi's 350,000-strong force moved weapons and thousands of troops around Mokha in mid-August, then used control of Yemeni telecoms to intercept enemies' calls and sow confusion during Friday's seizure of Perim Island. — [Wall Street Journal](#)
- Cambridge's Elisabeth Kendall: 'They feel they've won the civil war... they aren't afraid of the United States.' — [Wall Street Journal](#)

Displacement mounts; UN flags Iran airstrikes

- UNHCR says at least 80,000 people have been displaced by escalating Yemen fighting in recent days; the IOM puts it at 82,000-plus since September 1, including more than 2,000 who fled across the Gulf of Aden to Djibouti. (Reported around the evening cutoff; carried here as a check.) — [Reuters](#)
- The UN Human Rights Council fact-finding mission on Iran said 'repeated airstrikes causing civilian casualties raise serious questions' about IHL compliance, warning that failure to cease 'may give rise to international responsibility, including for war crimes.' — [UN News](#)

El Gaia claims dispute stands

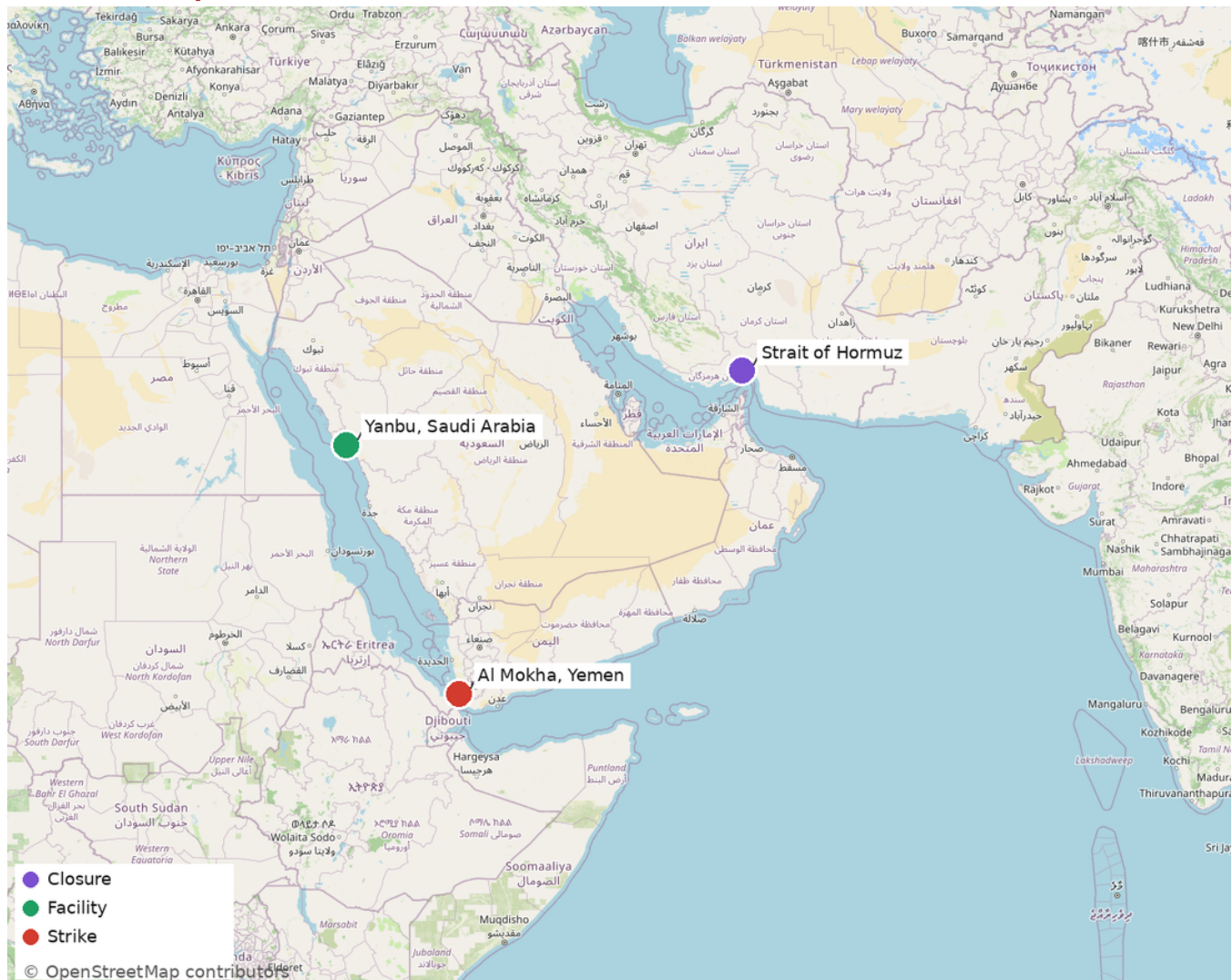
- The IRGC, via Fars, claims the Panamanian-flagged tanker El Gaia hit sea mines in a restricted zone Monday night. — [Reuters](#)
- CENTCOM says the tanker was struck by an Iranian missile last month, struck again by an Iranian drone this weekend, and is being towed by a regional partner. — [Reuters](#)
- The IMO is neutral: El Gaia was damaged September 12, cause unidentified. Its updated incident list says two seafarers are missing; India's foreign ministry says 13 of the 14 crew were rescued and one remains missing, with search and rescue continuing. The discrepancy is unresolved. — [Reuters](#)
- ISW's September 14 assessment called the IRGC's mine claim false, said recent US strikes degraded Iranian coastal radars, surveillance, and mine-laying capabilities, and noted Tasnim (Iranian regime media) acknowledging Iran's control of the strait may be waning. This is analysis, not outlet-verified fact. — [Institute for the Study of War](#)

Monday recap: what you may have missed

- The Houthis fired dozens of missiles and drones at the Khamis Mushait airbase Monday; 13 civilians were wounded and Saudi emergency alerts were re-issued in four southern cities. — [Reuters](#)
- The Pentagon Inspector General released the first formal accounting of US losses in the Iran war: hundreds of buildings damaged or destroyed across eight countries, key munitions depleted, and the Navy's Bahrain hub destroyed. — [CNN](#)

- Oman postponed the Iran–Gulf talks on reopening Hormuz; the IRGC Navy declared the strait 'closed and still under our smart control'; SNSC secretary Mohsen Rezaei said on X: 'No talks until Iran's conditions are met.' — [Reuters](#)
- The US blocked a snapback-sanctions travel exemption for Iran's nuclear chief Mohammad Eslami, so Austria revoked his visa and he missed the IAEA General Conference in Vienna. Iran and Russia protested. (Monday; flagged from overnight reporting.) — [Reuters](#)

Conflict map



Markers show reported strike sites, bases, and shipping areas. Purple polygons mark approximate or announced closure / exclusion zones.

Related media



NASA satellite view of Qeshm Island near the Strait of Hormuz — [view original](#)



The Bab al-Mandeb strait, where the Houthis are tightening control after seizing Perim Island — [view original](#)

■ Video explainer: the El Gaia tanker attack and the missing seafarers

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