

US-Iran Conflict Briefing

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Iran offers to reopen Hormuz within seven days if the U.S. eases military pressure

- Japan's Kyodo News reported that Iran offered to reopen the Strait of Hormuz within seven days if the United States takes steps toward easing military pressure, as world leaders gather in New York for the UN General Assembly. — [Wall Street Journal](#)
- Brent crude futures fell 2.6% to \$97.76 a barrel and WTI declined 3.1% to \$92.78 on Tuesday, after Brent had climbed above \$102 in early European trading — a sharp reversal on the Kyodo report. — [Wall Street Journal](#)
- U.S. Central Command said the volume of oil, natural gas and cargo passing through the strait over the past two weeks reached its highest level in six months. — [Wall Street Journal](#)
- Saudi Aramco is loading more crude at its Persian Gulf terminals, moving it through Hormuz, and transferring cargoes ship-to-ship off Oman; the company told several Asian customers to pick up shipments off Oman, the Journal reported, citing people familiar with the matter. Gulf of Oman ship-to-ship activity has surged to record levels, Kpler said. — [Wall Street Journal](#)

Saudi Arabia restarts the East-West Pipeline; Yanbu exports could resume Tuesday

- Saudi Arabia restarted operations at its East-West Pipeline and could resume crude exports from the Red Sea port of Yanbu later on Tuesday, three sources briefed on the matter said; the pipeline is pumping at a low rate. Drone attacks forced the shutdown on September 13, halting crude loadings at Yanbu. — [Reuters](#)
- Around 2.4 million barrels a day of Saudi crude and condensate flowed through Hormuz over the past two weeks, returning to levels last seen in early July, according to Kpler; the four-week average of Saudi crude loadings from inside the Persian Gulf rose above 2 million barrels a day last week, from virtually zero for most of June, according to Vortexa. — [Wall Street Journal](#)

Hormuz traffic falls to two vessels as the attacked tankers are identified

- Commodity vessels crossing the Strait of Hormuz fell to two on Monday from 10 a day earlier, preliminary Kpler data showed — a minerals-laden Panama-flagged Supramax and a Liberia-flagged bulk carrier. Before the war the strait typically handled about 125 large commercial vessels per day. — [Reuters](#)
- The Isle of Man-flagged crude tanker LR Stephanie, managed by Universal Tanker Corp., was struck by an unidentified projectile while entering the waterway on Monday, injuring two crew members; the Liberia-flagged LPG tanker Al Maryah, managed by Abu Dhabi National Oil Company, was struck while outbound on Sunday. Both continued without towing assistance; responsibility for both incidents remains unconfirmed. — [Reuters](#)
- At the Bab el-Mandeb Strait at the southern end of the Red Sea, 26 vessels crossed on Monday, unchanged from a day earlier. — [Reuters](#)

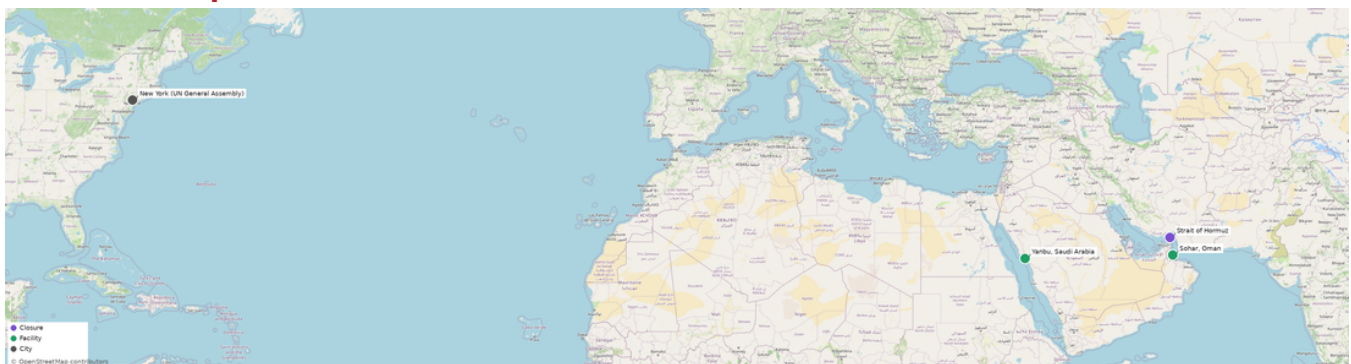
UN week opens with diplomacy hopes fading

- Oil prices rose earlier Tuesday on fading optimism about U.S.-Iran talks at the UN General Assembly — front-month Brent up 1.6% at \$101.99, WTI up 1.7% at \$97.40 — before the Kyodo report reversed the market. — [Wall Street Journal](#)
- Qatari officials plan to use the UNGA gathering to discuss resuming talks, multiple diplomats said, but no formal talks with Iran are confirmed; UN Secretary-General António Guterres told reporters last week that serious U.S.-Iran dialogue 'probably will take place somewhere else.' — [Wall Street Journal](#)
- Trump is set to address the Assembly Tuesday and Pezeshkian is expected to speak Wednesday; Trump didn't rule out meeting with Pezeshkian in New York. — [Wall Street Journal](#)

What to watch next

- Whether Washington responds to Iran's seven-day Hormuz offer — and whether the offer holds.
- Whether Yanbu crude exports actually resume Tuesday, and at what pumping rate.
- Trump's address to the General Assembly today and Pezeshkian's on Wednesday — and whether the two cross paths.
- Whether the Hormuz tanker attacks continue, and whether any group claims responsibility.
- The Houthi highlands offensive in Yemen and the push toward the Red Sea coast.

Conflict map



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

Related media



Tankers transiting the Strait of Hormuz (illustrative photo) — [view original](#)



Regional map of the Strait of Hormuz with an aerial view of an oil tanker (illustrative) — [view original](#)

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