

MINTEL WORLD

M I N T E L

MIDDLE EAST

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SAUDI AIRPORTS UNDER RENEWED ATTACK
US-IRAN CONTACTS LEAVE ESCALATION RISK
HORMUZ PRESSURE TESTS ENERGY AND TRADE

9-16 OCTOBER 2026



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EDITOR'S NOTE

Repeated attacks on Saudi airports and energy infrastructure, renewed pressure on shipping through the Strait of Hormuz, and worsening conditions in Gaza and Yemen defined the week. Diplomacy continued around a possible US–Iran settlement, but negotiations did not remove the risk of renewed strikes. By 16 October, Saudi Arabia was publicly linking Houthi attacks to Iranian support, placing additional strain on the rapprochement between Riyadh and Tehran.

The economic consequences extended beyond crude supply. Disruption to shipping, shortages of refined fuels, and uncertainty over insurance and freight affected public finances, aviation and basic services. Syria's efforts to reconnect with international financial institutions and attract reconstruction investment progressed alongside pipeline damage and unresolved security arrangements. Across the region, investment announcements remained dependent on implementation, financing and access to reliable energy.

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SECURITY & MILITARY

SAUDI ARABIA AND YEMEN

Attacks on Saudi Arabia's civilian and strategic infrastructure intensified during the reporting period. The 10 October strike on Riyadh's King Khalid International Airport killed 13 people after an injured Indian national died; initial reporting had recorded 12 deaths and 309 injuries. A separate attack on 11 October killed a Pakistani national and injured 11 people. The incidents caused repeated flight suspensions, demonstrating the difficulty of maintaining normal airport operations while missile and drone attacks continued.

The Houthis warned airlines and airport workers against using Saudi airports, while stating exceptions for the holy cities of Mecca and Medina. Saudi authorities reported further interceptions around Riyadh and other locations. On 15 October, the coalition reported intercepting a cruise missile over Medina province; the Houthis denied responsibility for that incident. The geographical distinction matters because an interception over the province does not establish that an airport in a holy city was deliberately targeted.

On 14 October, Saudi reporting described a limited fire at an Aramco administrative building in Dhahran. Other reporting, citing unnamed regional officials, described damage to upper floors of the headquarters building. Houthi military spokesman Yahya Saree claimed attacks on Dhahran and targets in Riyadh. The available accounts establish an infrastructure security incident, but do not establish that Saudi crude production or refinery operations stopped as a consequence of the headquarters strike.

The conflict also widened within Yemen. Missiles hit Aden's al-Maashiq presidential palace complex on 15 October, killing five people and injuring 16, according to the government's health minister. Prime Minister Shaya al-Zindani and cabinet members were reported safe. The Houthis said they had targeted a Saudi military operations headquarters; government reporting described the attack on the seat of the internationally recognised administration. These accounts concern the same attack and should not be treated as separate casualty events.

Fighting around the Red Sea coast and Bab al-Mandab continued, with competing claims about territorial control. Government-aligned sources reported advances, but subsequent reporting disputed that the strait and Mayun island had been fully secured. The week ended without a sufficiently established basis for describing the maritime chokepoint as under uncontested government control.

YEMEN'S CIVILIAN EMERGENCY

Military escalation deepened the humanitarian crisis. On 9 October, the United Nations reported that more than 200,000 people had been displaced since early August, including approximately 4,000 who had crossed to Djibouti and Somalia. Those figures cover a cumulative displacement period, rather than movements during this reporting week alone. Médecins Sans Frontières described families arriving from western Taiz and southern Hodeidah after difficult journeys, with shortages of water and shelter and continuing exposure to disease and malnutrition.

Taiz's governor warned on 14 October that fuel shortages were threatening hospitals, water provision and refuse collection. Local reporting said more than two million litres of diesel and dozens of gas trailers had remained blocked at Tur al-Bahah for over two weeks. Government appeals for humanitarian access placed the number affected in the millions. The immediate problem was the interruption of essential services as transport restrictions compounded insecurity.

Amnesty International condemned attacks on civilians in Saudi Arabia and Yemen, including the Riyadh airport strike. Its reporting also cited civilian deaths from Saudi-led air operations in Yemen. The various totals published by humanitarian monitors cover different dates and methods; they cannot be combined into a reliable weekly casualty count. The consistent finding was that attacks on civilian infrastructure and restrictions on movement were increasing needs faster than relief operations could respond.

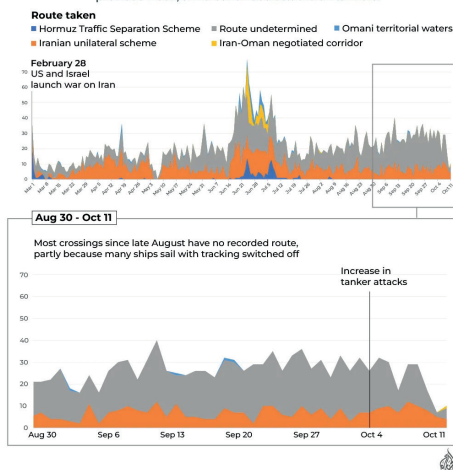
IRAN AND THE RISK OF RENEWED US STRIKES

Reporting during the week described continuing US and Israeli consideration of further military action against Iran. A 10 October account citing Western intelligence challenged claims that Iran's missile and drone production capabilities had been eliminated. The assessment remained attributed intelligence reporting, but it reinforced uncertainty over how far earlier operations had degraded Tehran's ability to rebuild its forces.

On 15 October, CNN reported that US military planners had developed additional strike options involving energy and nuclear infrastructure. Reporting included discussion of the GBU-43/B large conventional blast weapon. A planning option is not an order to launch, and discussion of a powerful surface-blast weapon does not establish that it could destroy a deeply buried nuclear installation. In a Newsmax interview reported on 16 October, President Donald Trump did not rule out further conventional attacks, while rejecting the use of nuclear weapons and indicating that he did not envisage a ground operation. The interview followed his earlier position against renewed attacks before the US midterm elections on 3 November. His statements preserved military pressure while leaving both the timing and the choice of targets uncertain. Iran said on 16 October that it had repaired a significant share of damaged defensive equipment and acquired additional systems. Army spokesman Mohammad Akraminia described

joint army–Revolutionary Guard exercises and stronger air-defence coverage, without specifying the new equipment. These were Iranian capability claims; no independently verified inventory was provided. Together, the US planning reports and Iranian preparations indicated continued readiness for escalation despite diplomatic contacts.

How many ships passed through the Strait of Hormuz?
Crossings totalled 143 between October 5–11, down 29.6% from 203 during the previous week, amid continued attacks on tankers.



GAZA AND THE WEST BANK

Violence continued in Gaza amid an increasingly fragile humanitarian situation. A strike on an apartment in Gaza City's Rimal neighbourhood on 14 October killed Reem Awad, aged 33; her daughter was rescued and other people were injured. Israel said it was investigating a strike connected to a claimed Hamas operative. Reporting did not provide evidence sufficient to resolve that claim. Multiple accounts of the apartment strike describe one incident, rather than separate attacks.

Israeli reporting also described changes to the military's forward deployment inside Gaza. A Ynet account put the area under Israeli control at approximately 64 percent of the territory and presented the deployment as a forward-defence arrangement. The estimate was a reported assessment, rather than an independently mapped territorial audit. It nevertheless underscored the continuing importance of access restrictions and military lines to any discussion of civilian return or reconstruction.

In the West Bank, an arson attack on a mosque in Mikhmas on 14 October, accompanied by Hebrew graffiti, prompted Palestinian accusations against settlers and an Israeli military investigation. The incident added to concern over violence affecting communities near settlement areas. By the close of the week, responsibility and subsequent prosecution remained unresolved in the reporting reviewed.

Israel's approaching 27 October election also shaped the security debate. Gadi Eisenkot's pledge to end Hamas's rule within 18 months was a campaign commitment conditional on his becoming prime minister. Separately, reporting on a purchase of 12 AH-64E Apache helicopters indicated delivery early in the next decade. The procurement concerns future force development, rather than an immediate addition to the week's operational capacity.

LEBANON AND SYRIA

Lebanese authorities' seizure of explosives on the Dahr al-Baidar route became a direct test of the government's claim to control weapons. Prime Minister Nawaf Salam called for investigators to identify both the organisers and those who ordered the shipment. On 16 October, Hezbollah MP Hassan Fadlallah acknowledged that the seized vehicle and cargo belonged to the group and demanded their return and the release of those detained. AFP cited a judicial source describing 250 kilograms of TNT and 250 kilograms of C-4.

A separate seizure near Qasr in the Hermel area involved approximately 200 kilograms of explosives reportedly being smuggled from Syria. It was a distinct operation and should not be merged with the Dahr al-Baidar case. Another dispute arose over a police search of a pharmaceutical warehouse in Beirut's southern suburbs. Hezbollah denied links to the warehouse but invoked a security coordination mechanism; the Internal Security Forces said officers completed the judicially authorised search. The competing accounts illustrated continued friction over the state's ability to act in areas where Hezbollah retains influence.

Israeli Defence Minister Israel Katz warned on 14 October of a wider security zone and large-scale displacement if Hezbollah joined renewed hostilities connected to Iran. This was a conditional threat, rather than evidence that the threatened operation had begun. Southern Lebanon remained exposed to strikes and unresolved border insecurity while Beirut pursued diplomatic contacts.

In Syria, the Interior Ministry announced on 16 October that it had disrupted an Islamic State plan to attack a police patrol in rural Damascus, arresting two suspects and seizing a prepared explosive device. The account was an official security claim under investigation. Reported Israeli incursions and damage to civilian property in the south, alongside tensions over northeastern governance and force integration, showed the range of pressures facing the transitional authorities.



DIPLOMACY & GEOPOLITICS

US–IRAN CONTACTS AND SAUDI–IRANIAN RELATIONS

Diplomatic exchanges continued through several channels, without producing a published comprehensive agreement. Iranian Foreign Ministry spokesman Esmail Baqaei said on 12 October that Tehran was reviewing US proposals. Pakistan and Qatar remained important intermediaries, while Moscow presented itself as able to assist. Reporting about a possible short-term arrangement for Hormuz passage showed that maritime access and the nuclear file were being discussed on different timelines.

The central negotiating problem remained the sequence of concessions. Tehran resisted negotiations under military and economic pressure, while Washington maintained pressure over nuclear activities and maritime security. Russian descriptions of messages relayed between the parties did not amount to joint US–Iran confirmation of agreed terms. No public settlement at the end of the reporting period resolved the relationship between sanctions, the blockade, nuclear constraints and freedom of navigation.

Saudi Arabia's position hardened publicly on 16 October. Deputy Foreign Minister Rayed Krimly accused Iran of encouraging Houthi attacks and said continued Iranian support for the group breached commitments associated with the China-brokered rapprochement of March 2023. The statement placed the Yemen conflict directly within Riyadh's bilateral relationship with Tehran. It did not itself announce the termination of diplomatic relations, but exposed the limits of rapprochement while cross-border attacks continued.

The UN Security Council condemned escalating Houthi attacks on Saudi Arabia, including strikes on Riyadh's airport, as well as attacks and threats against commercial shipping. Pakistan also reiterated support for Saudi Arabia under its defence relationship. Public solidarity and treaty references did not establish that a new Pakistani ground deployment into Yemen had occurred. The immediate diplomatic effect was to broaden pressure on the Houthis while leaving the wider ceasefire problem unresolved.



PALESTINIAN GOVERNANCE AND EXTERNAL PRESSURE

President Mahmoud Abbas issued a decree setting presidential and legislative elections for 11 September 2027, postponing the legislative poll previously scheduled for 28 November 2026. The decision extended a prolonged period without renewed national electoral mandates. It also complicated efforts to connect changes in Palestinian governance with proposals for Gaza's post-war administration.

International pressure increasingly focused on settlement activity and the institutions enabling it. Britain announced a sanctions framework directed at settlement-related actors, including potential financiers and facilitators. The framework's adoption and parliamentary process should be distinguished from the designation of every possible target. Its significance lay in the possibility of broader financial consequences for activity linked to settlements.

The International Criminal Court faced additional US sanctions pressure, prompting objections from the court and European actors. Reporting described implementation arrangements and licences, rather than an immediate cessation of the court's work. The dispute widened the institutional confrontation over accountability while violence and restrictions continued on the ground.

Plans for Gaza's future administration and rebuilding remained constrained by access. Reporting on an intended construction presence involving Moroccan and Kosovan personnel said entry had been blocked despite contractual preparations. Large proposed budgets and long-term reconstruction estimates were therefore not evidence of work already delivered. The gap between diplomatic architecture and actual movement of personnel and materials remained substantial.

LEBANON'S EXTERNAL SUPPORT

Beirut continued to seek external support for stabilisation and stronger state institutions. The European Union established a military and civilian advisory mission framework for Lebanon for three years. Establishment of the framework did not mean the full mission was already deployed; operational planning and a launch decision remained necessary. The initiative also differed from the UN peacekeeping presence and could not simply substitute for it. Discussion of the reported end of UNIFIL's mandate on 31 December heightened concern about a monitoring gap. An advisory mission focused on Lebanese institutions would not automatically reproduce UNIFIL's field presence, liaison arrangements or capacity to observe conditions along the southern frontier. The practical issue was how international support would operate while border incidents and disagreements over non-state weapons continued. Lebanese Foreign Minister Youssef Raji's contacts in Moscow and President Joseph Aoun's exchanges with Iranian Foreign Minister Abbas Araghchi formed part of this wider diplomatic effort. Russia emphasised humanitarian assistance and the implementation of existing ceasefire commitments. These contacts did not settle the domestic dispute over Hezbollah's weapons or remove the risk of spillover from an escalation involving Iran.

SYRIA'S REINTEGRATION AND UNFINISHED INTERNAL ARRANGEMENTS

Syria's engagement with international institutions advanced through technical and political steps. Reporting on 14 October said the country would return to the IMF's Arab constituency on 1 November, having been represented through the Russian constituency since 2012. Preparations for stronger technical engagement and future surveillance discussions were distinct from approval of a lending programme.

The Kuwait Fund expressed readiness to resume engagement, with technical, legal and financial work still required. A possible trust fund remained under consideration. Talks with the International Finance Corporation likewise covered financing structures, state-bank restructuring and ways of mobilising private and diaspora capital. These initiatives created potential routes to investment but did not establish that proposed facilities or diaspora bonds had been launched.

Security and governance arrangements in the northeast remained incomplete. Ilham Ahmed described difficulties implementing agreements, including unresolved appointments, salary arrangements and guarantees for Kurdish rights. Formal declarations about dissolving or integrating forces did not by themselves demonstrate a unified operational chain of command. The effectiveness of the settlement depended on what local administrations and security units actually did.

Chemical-weapons accountability also remained active. The OPCW director-general visited Zamalka on 14 October, while Syrian officials described the scale of documentary material and earlier supervised destruction work. Those developments supported continuing investigation and cooperation; they did not establish that all questions about the former chemical-weapons programme had been closed.



IRAQ'S CABINET AND THE QUESTION OF ARMED FACTIONS

Prime Minister Ali al-Zaidi completed his cabinet during the week, according to reporting published on 16 October. The appointments included figures linked to armed groups aligned with Iran, including Laith al-Khazali of Asaib Ahl al-Haq as a deputy prime minister. AFP's account, carried by Al Arabiya, cited diplomats who said Washington had given tacit acceptance in exchange for assurances about disarmament and protection of US interests. The reported US position was attributed to diplomatic sources rather than a published bilateral agreement. The substantive issue was the relationship between participation in government and the continued possession of weapons. Reporting said the deadline for handing over factional arms had been extended to 30 June 2027. Cabinet formation therefore resolved an institutional vacancy while leaving the more difficult question of enforceable state control over armed groups open.



ILLUSTRATIVE ARCHIVE IMAGE

ENERGY & NATURAL RESOURCES

OIL PRICES AND EMERGENCY INVENTORIES

Oil markets continued to price the risk of disrupted Gulf exports. On 16 October, an early trading snapshot put Brent at \$105.48 a barrel and West Texas Intermediate at \$97.40, with both heading towards a weekly gain. These are intraday quotations, rather than final weekly settlements. Attacks on shipping and uncertainty over negotiations remained central to the risk premium. Emergency stock releases offered some relief but did not repair shipping security or eliminate shortages of particular fuels. Reporting on 16 October described an effort to accelerate roughly 100 million barrels still outstanding from the IEA's emergency action agreed in March. This was the remaining portion of the earlier 400-million-barrel programme, rather than an entirely new commitment of that size. The US Department of Energy also offered an exchange of up to 17 million barrels from the Strategic Petroleum Reserve. An offer is not the same as completed delivery: participation depends on commercial demand and repayment terms. The practical impact on markets therefore depended on uptake, the speed of release and whether refiners could use the crude to produce the fuels most urgently needed. The distinction between crude availability and refined-product availability remained important. Diesel shortages and constrained refining and transport could persist even when emergency crude barrels entered the market. Measures aimed at freight capacity, product inventories and refinery operations were consequently relevant alongside headline oil supply figures.

SAUDI SUPPLY RESILIENCE AND ALTERNATIVE EXPORT CAPACITY

Saudi Arabia continued to promote the East–West pipeline as a way to reduce dependence on Hormuz. Reporting described an ambition to raise capacity to 10 million barrels a day over two to three years. A nearer-term proposal involved converting gas infrastructure to carry additional oil. These were capacity plans with different implementation schedules, rather than evidence that the full proposed increase was already available. Aramco chief executive Amin Nasser said on 16 October that the company restored damaged facilities at a pace six times the industry average, citing the recovery of the East–West line within days. The comparison was the company's own claim. It highlighted Aramco's emphasis on repair teams and redundancy, while the Dhahran incident demonstrated the continued exposure of corporate and operational infrastructure to attack. Outside the kingdom, the Saudi-backed Huajin Aramco Petrochemical Company project in China received its first crude cargo. The planned refinery has a capacity of 300,000 barrels a day, with start-up targeted for the first quarter of 2027. Receipt of a first cargo was a project milestone, rather than confirmation of sustained commercial production. The investment showed that Saudi downstream expansion continued alongside efforts to protect domestic export infrastructure.



IRAQ'S OIL RECOVERY AND FISCAL EXPOSURE

Iraq's energy reporting combined incremental production gains with evidence of severe fiscal damage. Two additional wells at Nasiriyah were reported to have added approximately 10,000 barrels a day. Such field-level additions matter for output recovery, but their value depends on available storage, export routes and reliable settlement with producers. On 15 October, reporting described a first SOMO-allocated cargo used to settle receivables relating to the fourth quarter of 2025. The transaction did not mean that all outstanding claims had been paid. It illustrated the use of physical export allocations to address payment obligations while the state's cash position remained under pressure.

Foreign Minister Fuad Hussein put Iraq's losses from the regional war at approximately \$60 billion, according to an official account of a meeting in Rome reported on 16 October. The estimate covered the war's cumulative effects, not losses incurred during this week. Disruption to Hormuz had sharply reduced revenue from the country's principal export route, with borrowing and pressure on foreign-exchange reserves adding to the burden. Recovery in output alone could not remove that exposure while transport remained insecure.

SYRIA'S FUEL SUPPLY AND INTERNATIONAL TRANSACTIONS

Syria's authorities reported an oil-import letter of credit connected to Aramco, described as the first such instrument in 14 years. The development suggested progress in restoring a channel for commercial energy payments. It did not establish a general normalisation of correspondent banking or guarantee uninterrupted fuel availability throughout the country. Damage to two pipelines on 15 October underlined the fragility of the domestic network. The Syrian Petroleum Company described an explosion on the Jbessa gas pipeline in southern Hasakah as sabotage. A separate leak on the Baniyas–Homs products pipeline near Hadida was linked in state reporting to suspected attempted fuel theft. The incidents had different reported circumstances and should not be collapsed into a single confirmed attack.

Crews isolated the affected sections and began repairs. Officials said alternative arrangements would continue supplying power stations and that domestic gas provision was unaffected. These were contemporaneous operational assurances, rather than proof that all damage had been repaired. The incidents added to a wider pattern of interruptions affecting a sector still trying to restore production, processing and distribution.

EGYPT AND REGIONAL ENERGY DIVERSIFICATION

Egypt's renewable-energy pipeline advanced with the start of construction at Scatec's 900-megawatt Shadwan wind project, reported at an investment cost of approximately \$716 million. Initial generation was targeted for late 2027. Bridge financing and a proposed EDF stake were steps towards the project's funding structure; they should be distinguished from the closing of all long-term financing.

Battery-manufacturing announcements also reflected Egypt's attempt to build domestic capacity around energy storage. A Rosatom–Teletch initiative envisaged annual assembly capacity of 500 megawatt-hours. Other reported factory plans involved larger capacities. Annual manufacturing output, planned factory capacity and the amount of storage installed on the electricity system are different measures and cannot be added together.

The regional gas picture remained constrained by access to LNG. Wood Mackenzie described weaker South Asian gas demand as high prices and supply disruption forced consumption cuts. Qatar and the UAE lacked an equivalent large-scale LNG bypass around Hormuz. Renewable generation and storage could improve resilience over time, but projects scheduled for 2027 or later did not address the immediate disruption to gas shipments and fuel supply.



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MINING & CRITICAL MINERALS

SAUDI LITHIUM EXTRACTION

An agreement announced before the reporting week for a lithium demonstration project between NESR and Aramco illustrated Saudi efforts to develop minerals alongside its established petroleum industry. Reporting described a target of approximately 2,000 tonnes a year of battery-grade lithium carbonate, with operations envisaged for late 2027. Commercial opportunity estimates, including a potential five-year value of \$200 million, were company projections. The project remained at the demonstration and development stage. A production target does not establish sustained recovery rates, operating costs or commercial output. Successful scale-up would require consistent processing performance, reliable access to inputs and a viable market for the product. Saudi Arabia's energy infrastructure offers advantages for mineral processing, but water, cooling, technology and financing remain material constraints on expansion.

SYRIAN CEMENT AND RECONSTRUCTION MATERIALS

Cement investment in Syria exposed the gap between rebuilding demand and the condition of domestic industry. On 13 October, reporting described the foundation stage of a \$200 million project near Ain Issa in Raqqa province. The Al Hassan project's stated design capacities were 7,000 tonnes of cement and 5,000 tonnes of clinker a day, with a construction period of two to two and a half years. Expected employment figures referred to construction or future operations, rather than an already functioning factory workforce. The project followed the earlier Omran-ÇİMKO arrangement for al-Muslimiyah, providing context for efforts to bring new capital and operating capacity into the sector. That earlier agreement predated this reporting period. It should be read as part of the investment pipeline, rather than a new transaction concluded between 9 and 16 October.

Existing producers faced more immediate problems. Reporting on licences and activity around Abu Shamat and al-Sabaa Biyar pointed to transport costs and difficult operating conditions. High energy costs had already encouraged some producers to halt clinker production and concentrate on grinding imported material. The distinction matters because a country can increase cement availability while remaining dependent on imported clinker and fuel.

For reconstruction, the principal near-term questions were therefore the cost and availability of building materials, access to energy and the logistics of moving product to construction sites. Announced factory capacities will contribute only after financing, construction and commissioning. The investment pipeline was significant, but it was not evidence that domestic supply constraints had already been removed.



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MARITIME ROUTES & STRATEGIC INFRASTRUCTURE

HORMUZ AND THE SECURITY OF MERCHANT SHIPPING

Attacks on merchant vessels kept Hormuz at the centre of the regional crisis. The container ship GFS Pride sank on 14 October after an attack the previous day. Reporting also described the sinking of Cape Dao after damage sustained in September; that loss should not be counted as a second new attack occurring on 14 October. Accounts differed on the weapons and attribution in individual cases, with some incidents involving projectiles of unconfirmed origin. A UKMTO advisory reported on 16 October rated the threat to merchant shipping as severe and further attacks as highly likely. It identified eight projectile incidents involving four tankers and four container ships on 11 and 13 October. The advisory also described surveillance, drone activity and radio challenges attributed to Iranian forces. The combination of actual vessel losses and persistent harassment continued to deter ordinary commercial movements.

Traffic estimates required careful interpretation. The advisory contrasted independent tracking showing single-digit movements with US-assisted flows averaging approximately 30 transits a day over the preceding 96 hours. These measures covered different traffic populations and observation methods. Neither figure alone demonstrated a return to unrestricted passage, particularly where ships were operating with limited tracking visibility.

Oil-flow estimates likewise varied by scope and measurement period. A Kpler estimate reported on 16 October put flows at 11.62 million barrels a day for the week to 13 October, compared with a 17.15-million-barrel baseline. Earlier estimates referring to other windows or narrower categories cannot be used interchangeably. The consistent operational conclusion was that exports remained vulnerable to repeated disruption and that apparent short-term recovery did not amount to normalised shipping conditions.

RED SEA AND BAB AL-MANDAB

Uncertain territorial control around Bab al-Mandab limited the immediate significance of government claims of battlefield gains in Yemen. Control of a coastal position does not by itself remove missile, drone or maritime threats along the wider route. Insurers and ship operators would still need sustained evidence that transits could proceed safely before a broad return of diverted services became likely. The European Union's Aspides mission reported increased demand for protection. Figures published during the week described 239 support requests in September, compared with an average of 139 a month over the preceding comparison period. The figures measured demand for assistance rather than new attacks or completed escorts. The mission's cumulative support and escort totals covered its wider operation, not activity during this week alone. For Egypt, a durable recovery in Suez Canal traffic remained dependent on conditions across the Red Sea route. Shipping diverted around the Cape of Good Hope could not be expected to return solely because of a local

advance on Yemen's coast. The principal constraints remained vessel security, insurance costs, schedule reliability and the ability to sustain safe passage over time.



AVIATION AND CIVILIAN ACCESS

The repeated attacks on Riyadh's airport made aviation disruption a regional infrastructure issue. A temporary restoration of flights on 9 October followed an earlier attack, but further strikes produced renewed suspensions. The sequence matters: an announcement that operations had resumed did not establish that the airport remained continuously open for the rest of the reporting period. The US Federal Aviation Administration issued a warning on 11 October concerning risks in Saudi airspace at all altitudes, with the advisory extending into December. The warning did not amount to a closure of every airport or a suspension of all regional aviation. It did, however, give carriers an additional basis for reviewing routes and operational exposure.

On 16 October, Aden airport security officials reported that two Houthi missiles had fallen within the airport perimeter as a passenger aircraft prepared to depart. Initial reporting said no deaths had been recorded. This was separate from the previous day's strike on the presidential palace. Together, the incidents showed the vulnerability of both civilian aviation and the internationally recognised government's principal institutions in southern Yemen.

GAZA'S COMMERCIAL CROSSINGS AND WINTER NEEDS

By the end of the reporting period, commercial goods were no longer entering Gaza, with Israeli authorities and Palestinian representatives giving conflicting explanations. COGAT attributed the interruption to merchants' objections to Hamas-related fees and cash requirements. Gaza's government media office denied mandatory taxation of the kind alleged, while the head of the private truckers' union said Israeli restrictions were responsible. The explanations remained disputed; the interruption to commercial supply was the immediate concern.

Commercial imports supplied goods that humanitarian distributions alone could not reliably replace, including perishable food and winter clothing. Reduced market supply threatened affordability as households approached winter with limited income and damaged shelter. A target for truck entry could not substitute for the observed volume and composition of goods actually admitted. On 9 October, the International Organization for Migration warned that almost two million people needed shelter assistance and that available stocks covered only 17 percent of winter requirements. It also reported that 56 percent of people living in displacement sites were exposed to flood risk and that thousands of shelter kits remained blocked from entry. The figures described vulnerability ahead of winter, rather than the number newly displaced during this reporting week. Medical evacuation and basic services remained under pressure as well. Reporting on 12 October described Rafah as having been closed for seven days, while restrictions affected other access arrangements. Water and sanitation assessments cited widespread insecurity and difficulty accessing services. The connection between commercial crossings, medical movement and essential infrastructure made access a determinant of civilian survival as well as an issue in ceasefire negotiations.

SYRIAN CORRIDORS AND RECONSTRUCTION LOGISTICS

Syria pursued border and transport projects intended to support trade and reconstruction. Reporting on 13 October described eight contracts involving four companies at the al-Tanf and al-Yarubiyah crossings. The planned development areas were approximately 500,000 and 125,000 square metres respectively. The contracts represented work on border infrastructure; they did not establish that a new regional oil-export corridor was operating. Officials also discussed road rehabilitation needs estimated at \$700–800 million, with routes towards Iraq, Türkiye and Jordan among the priorities. Such connections could improve trade and provide additional land options, but road-haulage capacity cannot automatically replace the scale of seaborne Gulf energy exports. Security, customs procedures, finance and maintenance would determine the practical value of the routes. Proposals to adapt Palmyra's military airport for civilian charter use remained under assessment. No established start date or demonstrated demand justified treating the project as an operating passenger gateway. Along with border development, it formed part of a wider effort to improve connectivity while domestic fuel networks and security arrangements remained vulnerable.



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CONCLUSION

The week ended with overlapping military, diplomatic and economic pressures still unresolved. Attacks on Saudi Arabia and southern Yemen expanded the conflict's immediate infrastructure costs, while US–Iran contacts failed to provide a durable assurance against renewed strikes. Riyadh's public criticism of Tehran on 16 October made clear that the Yemen escalation was also testing the region's diplomatic arrangements.

For energy and trade, safe movement remained as important as available production. Emergency stocks, pipeline expansion plans and repair capabilities could reduce particular pressures, but none alone removed the risks facing Gulf exports and merchant shipping. Gaza's interrupted commercial access and Yemen's fuel shortages showed how those wider conflicts translated into food, health and basic-service emergencies.

Syria's financial reintegration and proposed reconstruction projects offered a longer-term counterpoint. Their impact depended on converting agreements into financed and functioning infrastructure. The principal developments to follow were a verifiable US–Iran arrangement, sustained reductions in attacks, dependable access for civilian goods and assistance, and the implementation of investment and state-security commitments already announced.

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