

REGIONAL CARGO & LOGISTICS ALERT ★ LIVE

KUWAIT DRONES INTERCEPTED · US HITS IRAN RADAR (GORUK/QESHM) · IRGC MEMBER KILLED
TEHRAN · MOU UNSIGNED

Day 94
Edition 90

BREAKING: Kuwait air defences intercepted fresh drone and missile attacks this morning. IRGC says it targeted the air base used in a US strike on an Iranian telecoms tower on Sirik Island. Bloomberg confirms a US military facility in Kuwait sustained damage from the strike — two MQ-9 Reaper drones damaged, US personnel injured.

CENTCOM: US carried out self-defence strikes on Iranian radar and drone command-and-control sites at Goruk and Qeshm Island on Saturday and Sunday, in response to the shutdown of a US MQ-1 drone over international waters. Iranian air defences, a ground control station, and two one-way attack drones destroyed. No US troops harmed. This is the third ceasefire violation.

TEHRAN: Targeted strike reported in Andisheh suburb of Tehran (31 May). Senior IRGC-linked individual confirmed killed — identity disputed. Social media claims IRGC Commander Ahmad Vahidi assassinated; official Iranian sources have NOT confirmed. Treat as unverified at time of publication. MOU still unsigned.

● OPEN / OPERATIONAL

● CLOSED / SUSPENDED

● DISRUPTED / RESTRICTED

● ADVISORY / INFORMATION

BRENT CRUDE

\$92.05

Rebounding — deal risk repricing upward

WTI CRUDE

\$89.69

+2.67% today after May -16.2%

HORMUZ STATUS

MINED / CONTESTED

Active exchanges — DO NOT ROUTE

MARINERS STRANDED

~22,500

401 vessels · 3rd ceasefire violation

► **CHANGES SINCE LAST EDITION**

BREAKING Kuwait air defences activated this morning — sirens sounded across the country. IRGC claims it targeted the US air base that launched a strike on an Iranian telecoms tower on Sirik Island. Bloomberg: a US military facility was struck, damaging two MQ-9 Reaper drones and injuring US personnel. Situation ongoing.

BREAKING CENTCOM (Sunday): US conducted self-defence strikes on radar and drone command-and-control sites at Goruk (Iran) and Qeshm Island on Saturday and Sunday, in response to Iran shooting down a US MQ-1 drone over international waters. US eliminated Iranian air defences, a ground control station, and two one-way attack drones. 'Measured and deliberate.' No US troops harmed.

BREAKING IRGC's aerospace force states it targeted the US air base used in the American attack on a telecoms tower on Sirik Island. Kuwait confirmed intercepting the incoming missiles and drones. This is the third confirmed ceasefire violation — the first two were absorbed by both sides.

NEW Targeted strike in Andisheh suburb of Tehran (31 May/1 June): senior IRGC-linked individual confirmed killed. Identity disputed — social media claims IRGC Commander Ahmad Vahidi assassinated; Iranian official sources have NOT confirmed. Identity of the killed individual may be a satellite equipment contractor linked to IRGC's Khatam al-Anbiya organisation. Treat as unverified.

NEW Despite escalation: MOU architecture still intact per all parties. Trump still editing text — 'significant changes' on Hormuz and enriched uranium removal (CBS News). White House: deal 'within days.' Hegseth: Iran 'coming in our direction.' The ceasefire is fraying but has survived two prior violations. Third violation is the most serious.

NEW Brent \$92.05, WTI \$89.69: oil rebounded on 1 June after May's worst monthly decline since 2020. The new Kuwait/Iran exchanges will reprice deal probability downward and push Brent higher in early June trading. Watch for Brent to test \$95-97 on sustained escalation or MOU collapse.

UPDATE Kuwait KWI: situation unclear as of report issuance. Air defences intercepting this morning — check NOTAM and carrier advisories before dispatching any air cargo via KWI. Use MCT (primary) or AMM (daytime 09:00-18:00 GST) until all-clear confirmed.

UPDATE Lebanon: IDF continuing ground expansion in southern Lebanon despite talks scheduled 2-3 June at State Dept. Lebanon PM accusing Israel of 'scorched-earth policy.' Iran's Lebanon condition on MOU now more acute given simultaneous IDF escalation.

UNCHANGED DO NOT ROUTE via Hormuz — mines confirmed, MOU unsigned, war-risk 8x pre-crisis. Salalah/Aqaba operational. Maersk/MSC/Hapag-Lloyd landbridge active. Cape routing mandatory.

► **MOVE ONE ASSESSMENT**

THIRD CEASEFIRE VIOLATION — THE MOST SERIOUS YET: Today's exchanges represent the third violation of the April ceasefire — and by a considerable margin the most escalatory. The sequence is now: Iran shoots down a US MQ-1 drone over international waters; the US responds with self-defence strikes on Iranian radar and command-and-control sites at Goruk and Qeshm Island on Saturday and Sunday; Iran retaliates by striking a US military facility in Kuwait, damaging two MQ-9 Reaper drones and injuring US personnel; Kuwait air defences activate this morning. The first two ceasefire violations were downplayed and absorbed by both sides. This one is harder to absorb — it involves confirmed damage to US military assets, US personnel casualties, and Kuwaiti territory struck for the second time in a week. The pattern is escalation through retaliation rather than deliberate war resumption, which means the diplomatic track remains technically open. But the margin for error is shrinking fast.

TEHRAN ASSASSINATION — UNVERIFIED BUT SIGNIFICANT: A targeted strike in the Andisheh suburb of Tehran on 31 May/1 June killed a senior IRGC-linked individual. Social media is circulating claims that IRGC Commander Ahmad Vahidi has been assassinated — Move One is treating this as unverified at time of publication, as Iranian official sources have not confirmed and the most credible reporting identifies the individual as a satellite equipment contractor linked to the IRGC's Khatam al-Anbiya construction organisation. If Vahidi has been killed, the diplomatic implications are severe: he is the commander of the IRGC and the principal military authority behind Iran's ceasefire posture. His death would almost certainly trigger an immediate IRGC retaliation and would derail MOU negotiations. Monitor closely.

MOU SURVIVAL PROBABILITY — REVISED DOWNWARD: As of this morning, Move One revises the MOU deal probability from 55% to 40% within 7 days. The architecture is intact — Trump is still editing text, Hegseth is still positive, the White House is still saying 'within days.' But the operational tempo of mutual strikes is rising, not falling. The ceasefire's survival depends on both sides treating today's exchanges as retaliatory containment rather than war resumption. Iran's decision calculus has now changed: if Vahidi is confirmed dead, signing an MOU becomes a domestic political impossibility for the IRGC in the short term. Watch the next 6–12 hours for CENTCOM and Iranian state media statements.

KUWAIT OPERATIONS — MOVE ONE FULLY OPERATIONAL: Move One Kuwait operations are continuing normally. The IRGC struck a US military facility this morning, damaging two MQ-9 Reaper drones and injuring US personnel. Kuwait air defences are actively intercepting. KWI is operating at ~40 flights/day (T4/T5) and ports are functioning. Coordinate with andrew.davis@moveoneinc.com on Kuwait shipments; use MCT or AMM as air alternates if carrier advisories are issued. Contact gregory.forgrave@moveoneinc.com for government and military cargo. The Goruk and Qeshm CENTCOM strikes targeted Iranian drone and radar infrastructure — Iran's retaliation vector runs through Kuwait, so monitor the situation closely.

► **MARITIME & CARGO OVERVIEW**

LOCATION	STATUS	DETAILS
● Strait of Hormuz	MINED / ACTIVE EXCHANGES	US struck Goruk + Qeshm radar/drone C2 (Sat–Sun). Iran retaliated vs Kuwait. Active military exchange ongoing. Mines confirmed. DO NOT ROUTE.
● Salalah CT (Oman)	OPERATIONAL	Primary Cape hub. CT and GCT fully operational. Pre-book slots. Oman confirmed: will NOT toll Hormuz.
● Red Sea / Bab el-Mandeb	RISK — PAUSED	Houthi attacks paused. MARAD 2026-006 active (to Sep 2026). Lebanon/Hormuz escalation raises Houthi reactivation risk. Cape routing mandatory.
● Arabian Gulf (Upper)	RESTRICTED	Behind Hormuz. Active security exchanges in upper Gulf. MSC/Hapag-Lloyd feeder via Sharjah and Maersk Saudi landbridge active — coordinate with andrew.davis@moveoneinc.com before dispatching.
● Fujairah (UAE)	DISRUPTED	Operational. GPS spoofing Nav Warning 01/2026 active. IRGC zone-of-control covers eastern UAE coast. Monitor for escalation spillover.
● Khor Fakkan (UAE)	OPERATIONAL	All 6 berths active. 54,000+ TEU since crisis. AD Ports 800-truck landbridge active. Primary alternate for Kuwait sea cargo.
● Port of Aqaba (Jordan)	OPERATIONAL	Primary sea alternative. All terminals normal. Jordan stable. Preferred alternate for Kuwait-destined sea cargo.
● Port of Duqm (Oman)	OPERATIONAL	Normal ops. DG cargo: advance approval. Backup Cape hub. Oman unaffected by current exchanges.

► COUNTRY-BY-COUNTRY STATUS

UNITED ARAB EMIRATES (UAE)

LOCATION	STATUS	DETAILS
• Jebel Ali / DXB	DISRUPTED	Jebel Ali Gulf-side — landbridge only. DXB operational. GCAA NOC required. IRGC zone-of-control covers eastern UAE coast.
• Khor Fakkan	OPERATIONAL	Primary container gateway. 54,000+ TEU since crisis. Preferred Kuwait sea cargo alternate. AD Ports 800-truck landbridge active.
• Fujairah	DISRUPTED	Operational. GPS spoofing advisory active. Crude exports elevated. Monitor for escalation spillover from Qeshm strikes.
• Sharjah / AUH	ADVISORY	Normal ops. Hapag-Lloyd feeder hub at Sharjah. AUH open. AD Ports regional feeder services active.
• HHG & Pets	OPERATIONAL	HHG via east-coast ports or DXB/AUH air. GCAA NOC: foa@gcaa.gov.ae Pet permits required.

KUWAIT

LOCATION	STATUS	DETAILS
• Kuwait Security Situation	ACTIVE ALERT	IRGC struck a US military facility this morning (Bloomberg: 2× MQ-9 Reapers damaged, US personnel injured). Kuwait air defences intercepting drones and missiles. Move One Kuwait operations continue normally — coordinate with andrew.davis@moveoneinc.com on any Kuwait shipments.
• Shuwaikh / Shuaiba Port	RESTRICTED	Port operations continuing. Heightened security alert — coordinate with andrew.davis@moveoneinc.com before dispatching sea cargo. Monitor KUNA advisories.
• Kuwait Intl (KWI)	RESTRICTED	KWI continuing to operate (T4/T5 — ~40 flights/day). Air defences active. Check NOTAM and carrier advisories before booking Kuwait air cargo. MCT and AMM available as alternates.
• Ali Al Salem Air Base	ADVISORY	Bloomberg: US facility struck by IRGC missile — 2× MQ-9 Reaper drones damaged, US personnel injured. Base operational per CENTCOM. Contact gregory.forgrave@moveoneinc.com for government/military cargo.
• HHG & Pets	OPERATIONAL	HHG and pet moves proceeding normally. Coordinate with andrew.davis@moveoneinc.com for Kuwait-specific guidance. Pet import: Kuwait MOI approval required.

SAUDI ARABIA

LOCATION	STATUS	DETAILS
• Jeddah / King Abdullah	OPERATIONAL	Both ports operational. Maersk Sohar/Salalah/Jeddah landbridge and MSC ME Express active. Primary west-coast gateway.
• Dammam / Jubail	RESTRICTED	Behind Hormuz. Hapag-Lloyd/MSC feeder from Jeddah/Khor Fakkan. Monitor for impact from upper Gulf escalation.
• King Fahd Causeway	OPEN	OPEN — normal traffic. Critical Saudi-Bahrain land link.
• Riyadh / KAIA / Yanbu	ADVISORY	Airports operating. Saudi Arabia on elevated alert given regional exchanges. DO NOT pay Persian Gulf Strait Authority tolls.
• HHG & Pets	OPERATIONAL	HHG via Jeddah sea or KAIA air. SABER certification required for regulated goods.

QATAR

LOCATION	STATUS	DETAILS
• Hamad Port	RESTRICTED	Behind Hormuz. Feeder via Khor Fakkan/Jeddah. Qatar key diplomatic hub. Al Udeid Air Base on elevated alert given Qeshm/Goruk exchanges.
• Ras Laffan (LNG)	DISRUPTED	AIS on normally. LNG force majeure under commercial review. Escalation today increases LNG contract uncertainty.
• DOH Airport	RESTRICTED	Qatar Airways active. BGW/BSR/EBL resumed 10 May. Some Gulf routes constrained.
• HHG & Pets	OPERATIONAL	HHG via DOH air or Khor Fakkan feeder. Pet import: MOPH permit.

OMAN

LOCATION	STATUS	DETAILS
• Salalah CT	OPERATIONAL	Primary Move One Cape hub. Fully operational. Pre-book slots. Oman confirmed it will NOT toll Hormuz. Oman unaffected by current Iran-Kuwait exchanges.
• Sohar Port	OPERATIONAL	Normal. Maersk Sohar/Salalah/Jeddah landbridge active. DG cargo: ministry approval required.
• Duqm Port	OPERATIONAL	Normal. DG cargo advance approval. Backup Cape hub.
• Muscat MCT	OPERATIONAL	Primary regional air hub. Fully operational. PRIMARY ALTERNATIVE to suspended KWI. Oman neutral — safest routing option in region.
• HHG & Pets	OPERATIONAL	HHG via MCT air or Salalah/Sohar sea. Preferred routing for all Kuwait-destined cargo. Pet import: MAFW permit.

IRAQ

LOCATION	STATUS	DETAILS
• Umm Qasr	RESTRICTED	Container ops normal. Basrah Oil Terminal exports suspended. Monitor for escalation spillover from Kuwait.
• Baghdad (BGW)	RESTRICTED	Operating. Qatar Airways BGW resumed 10 May. Some carriers suspended. Elevated alert given regional exchanges.
• Erbil (EBL)	RESTRICTED	Open. Qatar Airways EBL resumed 10 May. Kurdistan stable.
• Torkham Border	CLOSED	CLOSED. Afghanistan cargo via Hairatan (Uzbekistan) only.
• HHG & Pets	OPERATIONAL	HHG via BGW/EBL air or Umm Qasr sea (advance coordination). Shore leave: emergency medical only.

BAHRAIN

LOCATION	STATUS	DETAILS
• Khalifa Bin Salman	RESTRICTED	Operational. Behind Hormuz — King Fahd Causeway primary access. US 5th Fleet largely evacuated. On elevated alert given today's exchanges.
• King Fahd Causeway	OPEN	OPEN — normal traffic. Critical Saudi-Bahrain land link.
• Bahrain Intl (BAH)	RESTRICTED	Airport open. Gulf Air at reduced frequency. Elevated alert.
• HHG & Pets	OPERATIONAL	HHG via BAH air or King Fahd Causeway. Pet import: BNA permit.

JORDAN

LOCATION	STATUS	DETAILS
• Port of Aqaba	OPERATIONAL	Fully operational. PRIMARY sea alternative for Kuwait-destined cargo. Jordan stable and unaffected.
• Amman (AMM)	OPERATIONAL	Daytime only: 09:00–18:00 GST. PRIMARY air alternative to suspended KWI.
• Trebil Border	OPERATIONAL	Jordan-Iraq crossing open. Monitor for congestion from rerouted cargo.
• HHG & Pets	OPERATIONAL	Jordan stable. HHG via AMM air or Aqaba sea. Pet import: Jordan vet authority.

ISRAEL

LOCATION	STATUS	DETAILS
• Haifa / Ashdod	RESTRICTED	Open. Ashdod NOT accepting RoRo. IDF expanding ground ops in southern Lebanon. Israel-Lebanon talks 2–3 June, Washington.
• Tel Aviv (TLV)	RESTRICTED	Ben Gurion operating. Some carrier suspensions. Check advisories.
• Eilat Port	CLOSED	Closed — Houthi/Gulf of Aqaba threat. Mediterranean access only.
• Lebanon (BEY)	DISRUPTED	IDF conducting fresh airstrikes and issuing evacuation warnings in southern Lebanon. BEY open — avoid for critical cargo.
• HHG & Pets	OPERATIONAL	HHG via TLV air or Haifa/Ashdod sea (not Ashdod RoRo). Pet import: IVSAB.

HORN OF AFRICA (DJIBOUTI / ETHIOPIA / ERITREA)

LOCATION	STATUS	DETAILS
• Djibouti Port	OPERATIONAL	Fully operational. US Camp Lemonnier ongoing. No disruption.
• Addis Ababa (ADD)	OPERATIONAL	Ethiopian Airlines fully operational. Ethiopia-Djibouti corridor operational.
• Eritrea / Asmara (ASM)	RESTRICTED	Limited commercial access. Verify case-by-case.
• HHG & Pets	OPERATIONAL	HHG via ADD air or Djibouti sea. Standard African customs documentation required.

PAKISTAN / AFGHANISTAN

LOCATION	STATUS	DETAILS
• Karachi Port	RESTRICTED	Operating. Pakistan Field Marshal Munir active mediator — today's exchanges add urgency to Pakistan's mediation role.
• ISB / KHI Airports	OPERATIONAL	Both operating normally. Pakistan maintaining neutral diplomatic position.
• Torkham (PAK-AFG Border)	CLOSED	CLOSED. Afghanistan cargo via Hairatan (Uzbekistan) only.
• Hairatan (North Corridor)	OPERATIONAL	Active. Pakistan SRO 691(I)/2026 (six Iran transit corridors from 25 Apr) active.
• HHG & Pets	OPERATIONAL	HHG via KHI sea or ISB/KHI air. Afghanistan: Hairatan only.

► GENERAL ADVISORY

SEA FREIGHT

- DO NOT route via Hormuz. Active military exchanges ongoing — US strikes Goruk/Qeshm, Iran strikes Kuwait. Mines confirmed. MOU unsigned. War-risk 8× pre-crisis. DO NOT pay Persian Gulf Strait Authority tolls.
- Kuwait sea cargo: Move One fully operational. Coordinate with andrew.davis@moveoneinc.com before dispatching — active security situation. Port of Aqaba and Khor Fakkan available as sea alternates if required.
- Kuwait air cargo: KWI operational at ~40 flights/day. Check NOTAM and carrier advisories before booking. MCT (primary) and AMM (daytime 09:00–18:00 GST) available as alternates.
- Primary Cape hub: Salalah CT (Oman) — pre-book slots. Maersk/MSC landbridge, Hapag-Lloyd Sharjah feeder active. AD Ports 800-truck UAE corridor operational.
- Red Sea: MARAD 2026-006 active (to 22 Sep 2026). Houthi attacks paused — but today's escalation is the primary Houthi reactivation trigger. Cape routing mandatory.

AIR FREIGHT

- Kuwait KWI: Operational (~40 flights/day T4/T5). Active security situation — check NOTAM and carrier advisories before booking. MCT (primary) or AMM (daytime 09:00–18:00 GST) available as alternates. Move One Kuwait air operations continuing normally.
- Primary hub: Muscat (MCT) — fully operational, lowest-risk routing. DXB/AUH: operational. GCAA NOC for UAE corridor: foa@gcaa.gov.ae
- Qatar Airways: BGW/BSR/EBL resumed 10 May. Ethiopian Airlines (ADD) fully operational. Check carrier advisories — further suspensions possible given today's exchanges.

ROAD FREIGHT

- King Fahd Causeway (Saudi–Bahrain): OPEN — normal operations. Trebil (Jordan–Iraq): OPEN.
- Torkham (PAK–AFG): CLOSED. Afghanistan via Hairatan (Uzbekistan) only.

SURCHARGES & EQUIPMENT

- EFS: Active — UAE, Qatar, Saudi Arabia, Bahrain, Kuwait (suspended), Iraq, Oman (Sohar). Today's escalation will reverse downward trend in EFS.
- EBS: Brent rebounding to \$92.05 after May's worst monthly loss since 2020. Today's Kuwait/Iran exchanges will push Brent toward \$95–97 in early June trading. Lock current rate agreements for 30–60 days — do NOT wait.
- War-risk: 8× pre-crisis. Third ceasefire violation confirmed today. P&I clubs will not reinstate cover until situation stabilises. Hormuz uninsurable.
- DP World London Gateway / Southampton: Export Service Fee (ESF) effective 1 July 2026.

► WATCH POINTS

WATCH 1 — TEHRAN ASSASSINATION CONFIRMATION (NEXT 2–4 HRS): The most urgent unknown: is the individual killed in Andisheh on 31 May IRGC Commander Ahmad Vahidi or a contractor? If Vahidi is confirmed dead: ceasefire collapses with near certainty, IRGC will escalate massively, MOU is off the table. If it is a lower-ranking figure: the diplomatic track may survive, but Iran has additional grounds to delay MOU signature. Monitor Iranian state media (IRNA/Press TV) and Israeli Defence Ministry for official statements.

WATCH 2 — THIRD CEASEFIRE VIOLATION: ABSORBED OR TRIGGER? The first two violations were absorbed by both sides. This is the most serious: US personnel injured, MQ-9 Reapers damaged, Kuwaiti territory struck again. The critical question is whether both sides treat this as retaliatory containment or the opening of resumed hostilities. Watch CENTCOM and IRGC statements in the next 6 hours. If CENTCOM announces additional strikes against Iranian territory beyond Goruk/Qeshm, the ceasefire is over.

WATCH 3 — KUWAIT DAMAGE ASSESSMENT AND ALL-CLEAR: Move One Kuwait operations are continuing. Bloomberg confirms 2× MQ-9 Reapers damaged at a US facility. KWI T4/T5 operating at ~40 flights/day; ports functioning with heightened security. Coordinate with andrew.davis@moveoneinc.com on Kuwait shipments. Contact gregory.forgrove@moveoneinc.com for urgent government/military cargo.

WATCH 4 — MOU STATUS POST-ESCALATION: Move One revises deal probability from 55% to 40% within 7 days. Architecture intact — Trump still editing, Hegseth still positive. But the operational tempo of mutual strikes is rising. If Vahidi confirmed dead: probability falls to <10%. If today's exchanges are absorbed like previous violations: probability recovers to 50%+ within 48 hours. The MOU is not dead — but it is visibly wounded.

WATCH 5 — HOUTHİ REACTIVATION: Today's exchanges — US striking Iran, Iran striking Kuwait, IRGC member killed in Tehran — are the exact conditions under which Houthi reactivation is most likely. MARAD

2026-006 active to Sep 2026. If Houthis reactivate simultaneously with Hormuz closure, Cape of Good Hope is the sole viable routing option with significant congestion and surcharge premium. Monitor Houthi Telegram channels.

WATCH 6 — ISRAEL-LEBANON TALKS (2–3 JUNE, WASHINGTON): IDF is expanding in southern Lebanon simultaneously. Iran conditions Hormuz MOU on Lebanon 'end of war on all fronts.' Today's escalation gives Iran additional grounds to harden Lebanon demands. If 2–3 June talks collapse, or if IDF escalates further before talks begin, Iran may use Lebanon as pretext to withdraw from MOU entirely.

► **MOVE ONE UNIQUE CAPABILITIES**

<p>Darfur / Chad Operations</p> <p>Active routing and logistics into Darfur and Chad via established aid and diplomatic corridors. Direct NGO and government coordination on the ground.</p>	<p>Gaza Operations</p> <p>Carl Corriveau leads Move One Gaza capability. Humanitarian corridor access, import/export coordination, and specialist logistics for the most complex delivery environment in the region.</p>
<p>US Military Bases (CENTCOM AOR)</p> <p>Regulated freight, HHG, and critical logistics to US military installations across CENTCOM — Diego Garcia, Al Udeid, Kuwait bases and beyond. Contact gregory.forgrave@moveoneinc.com for urgent base logistics.</p>	<p>Syria & Yemen Compliance Routing</p> <p>Full OFAC/US Treasury sanctions compliance. Dual-use review, denied-party screening, and lawful humanitarian exemptions for Syria and Yemen-adjacent cargo.</p>

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