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China

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*While Iran supplies 11% of China's oil, Saudi Arabia, Iraq, Oman and the U.A.E. account for 37%.*



An oil tanker unloads crude at a port in Yantai, China. CN- STR/ AFP VIA GETTY IMAGES

### The Price Beijing Pays for Backing Tehran

By Tom Tugendhat

Mariners sweltering in the Gulf, waiting to pass the Strait of Hormuz, are part of a spider's web of supply in which pressure at any point can be felt across the globe. Shipping companies have been unable to buy "forward fuel" at a negotiated price for delivery next month. They have no choice but to pay today's high prices, raising cargo costs so dramatically that reliable routes for food and goods become unprofitable. Owners managing the crisis from offices in

Singapore, Athens and London are recalculating routes and costs. For those in Shanghai there is an extra worry, one that hasn't been fully priced in: Their government's actions are threatening future relationships, not only today's traffic. *Note*

Beijing has for decades promoted itself as a nonjudgmental alternative to the U.S. and the West. Present everywhere, committed to nothing, minding its own business and making money from all sides. In the Gulf, that posture is now collapsing under the weight of its own contradictions. *Note*

China, according to multiple reports, has provided Iran with satel-lite imagery, components and intelligence needed to attack infrastructure and shipping as well as U.S. targets in Gulf countries. Each part of the logistics chain has helped Iran destroy refineries and docks and even kill civilians. That hasn't gone unnoticed in Riyadh and other capitals that, when combined, are far more important to China than Tehran.

In 2024, according to the U.S. Energy Information Administration, Russia supplied 20% of China's oil, more than any other country. Iran contributed 11%, largely through shadow tanker networks to evade Western sanctions. Those figures speak to the importance of Persian oil to China's power, but they don't tell the whole story. *Note*

In the same year Saudi Arabia supplied 14% of China's crude, Iraq 10%, Oman 7% and the United Arab Emirates 6%. Those four Gulf states accounted for about 37% of China's oil imports. China's enabling of Iranian aggression endangers suppliers that collectively matter more than three as much to the Chinese economy as Iran does.

Energy bound for China runs directly through the neighborhood that Chinese-assisted Iranian drones and missiles have been targeting. If Saudi Arabia and others decide they have had enough of the Chinese Communist Party's backing Iran's Islamic Revolutionary Guard Corps, that could see them divert their tankers away from China's ports.

Beijing may think it has alternatives in pipelines it has financed across Kazakhstan and Myanmar specifically to reduce dependence on the Gulf. But it isn't clear those workarounds would deliver enough fuel to support the world's largest trucking fleet on roads from Guangdong to Xinjiang.

The Gulf Arab monarchies aren't naive about great-power politics. They have survived for centuries by working carefully with larger powers. As Beijing's influence expanded, they welcomed Chinese investment in ports, infrastructure and technology. They joined partnerships that Beijing prizes as evidence of its global reach. With studied ambiguity, they declined to line up too firmly behind Washington's pressure campaigns. But their working assumption has been that China wouldn't undermine their security. Note

That's now in doubt. Riyadh and Abu Dhabi aren't going to denounce Beijing in the United Nations or tear up contracts, but the relationships with China will change. Will intelligence-sharing endure? Will cooperation over sensitive infrastructure continue? In the gradual realignment of loyalties, Saudi Arabia's acceleration of its defense relationships with Washington and the U.A.E.'s recently announced cooperation on defense with Ukraine reflect an understanding that neutrality can only get you so far. Note

Beijing stumbled into this awkward position through a logic that was locally coherent but ultimately self-defeating. Beijing's support for Iran secured for China discounted oil from the regime, which it helped to evade sanctions. It sustained a disruptive partner to keep American attention fragmented. It showed others that China doesn't abandon allies when the U.S. turns against them. Each reason had its own departmental sponsor in Beijing's bureaucracy, presumably without considering the view from Riyadh or Abu Dhabi.

As the war toggles between negotiations and open conflict, China's foreign-policy apparatus has to deal with the repercussions of its support for Iran. Reports of shared satellite data and dual-use technology have to be waved off or minimized as the evidence of Chinese military support becomes visible in impact craters across Arab Gulf states.

Beijing's diplomatic energy will now turn to reassuring the Arab monarchies that the satellite data was misused, that the components were never intended for offensive deployment, that the IRGC went rogue, and that the relationship with Gulf states remains one of mutual respect. Perhaps some of these excuses will be accepted, but in palaces across the Arabian Peninsula, assumptions are already shifting.

China is no longer the indispensable partner unburdened by a history of war in the region. It has now backed one state against others, hoping those that supply more than a third of its oil will forget the transgression. If history is anything to go by, Beijing's diplomats will be left sweltering in waiting rooms long after the ships' crews have returned home.

*Mr. Tugendhat, a Conservative, is a member of the British Parliament and a distinguished fellow at the Hudson Institute.*

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