

# Stanislav Krapivnik: How Middle East Conflict Threatens Global Food & Energy

Escalating Middle East conflict analyzed: Iranian forces strike US bases across Gulf states with missiles and drones, exploiting depleted air defenses. Discussion covers Iran's strategic retaliation targeting military and energy infrastructure while issuing civilian warnings. Examines Zelensky's outreach to Arab nations despite Ukraine's own ammunition shortages. Economic fallout includes potential European food crisis from fertilizer shortages and LNG supply disruptions. Israeli operations in Lebanon face stiff resistance with significant armor losses and growing domestic dissent. Political analysis explores US decision-making challenges, conflicting factional agendas driving the war, and risks of further regional escalation. Also addresses global proliferation of weapons, mercenary networks, and humanitarian consequences of infrastructure warfare in vulnerable Gulf states dependent on desalination. A sobering look at military realities, economic vulnerabilities, and the human cost of prolonged conflict.

## #Nima

What's going on with the latest developments in this war—somehow, escalations, let's put it that way—in this war that's happening. We've learned from Chinese satellite imagery that one of their satellites shows how a U.S. military aircraft at Prince Sultan Air Base in Saudi Arabia was targeted by the Iranians. It's an E-3C AWACS. Yeah.

## #Stanislav

Expensive. Really expensive piece of equipment.

## #Nima

The other one is the E-11A planes, along with, you know, refueling F-16s and other refueling aircraft. Whoa. From what you've seen so far, it seems that Iran, despite taking a lot of hits—you know, the United States together with Israel hitting the energy infrastructure in Iran—they're keeping their focus mostly on targets related to U.S. military operations. What's your understanding of the way Iran is continuing this fight?

## #Stanislav

Oh, no, no. Iran is "servicing"—and when I say servicing, that's a euphemism for destroying. Iran is servicing Western industry in the Middle East, or in the Persian Gulf, quite effectively too. It's just that, you know, President "Wynne Bigley," a.k.a. Trump—because he "Wynne Bigley," as he puts it,

"I Wynne Bigley." So much for grammar. That's what I'm calling him now, President Wynne Bigley. He has destroyed Iran for 29 days now. Every day he's destroyed Iran. And Iran doesn't have anything left. But for some reason, Iran keeps shooting a lot of missiles, drones, and everything else that's being destroyed. I guess they rebuild them at night. But the point is, Iran has enough assets to hit both military and industrial targets in parallel. For example, two Iranian steel plants have been hit by the Israelis.

Iran returned the favor, hitting the Israeli plant and five other plants in Kuwait, Bahrain, Qatar, the UAE, and Saudi Arabia. They somehow still have quite a few missiles left. So Iran has a huge reserve of missiles, and they're still producing missiles and drones. And, you know, you see the videos coming out of Tel Aviv and other places—missiles coming in. And considering, you know, the people who let those videos through are facing up to, I think, 15 years in prison from the Israeli government if they're caught, those videos are being posted at a grave personal risk to their freedom. So that's not just people posting for fun; that's a serious risk they're taking on themselves.

And we see that there are bigger and bigger demonstrations starting in Jerusalem, in Tel Aviv, and in other cities against the Israeli government—by Israelis, by anti-Zionist Jews, and by others who just don't want this to go on. They're still a minority—don't get me wrong, they're still less than 20%—but they've grown, which is a good sign. But in Kuwait—I mean, Kuwait's close enough to Iran that we've actually seen videos of Iranian FPV drones, with really big battery packs, flying around looking for something to blow up at this point. That's worth the effort. And there's nobody shooting at them, nothing. The bases are just easy targets. And in Saudi Arabia, at Prince Sultan—which was the question to begin with—you know, I had very good intelligence. Not from me personally, but through someone directly from that base.

Two weeks ago, the Saudis told the U.S. military, "You're on your own. We're not helping you. We're neutral. That's it. Survive the best you can." And those bases, interestingly enough, don't have bunkers. They never built any. They didn't think a conflict would last that long, and they were very, very reliant on their anti-aircraft systems. They thought the anti-air would be able to handle anything. Well, those systems are either out of ammunition, out of interceptor missiles, or they've been destroyed. So that's how that goes. Well... the issue now is that Iran has free rein to destroy those bases. There's nothing there to stop them.

And amazingly—I mean, I don't know how—but Iran keeps getting satellite images of these bases. I thought the Americans were the only ones with satellites in space, right? Because, you know, Trump has forbidden any satellite imaging coming out of there at all for over a month now. Nobody sees the damage. But apparently, it turns out there's more than one country with satellites up there. And some of them may have an axe to grind with the U.S.—like, say, in Ukraine. I'm not saying who's doing it, but apparently there are people who'd like to, you know, do some proxy payback. Let the viewer decide who I'm talking about. You have smart viewers; I think they get the point.

So, yeah, Iran has quite a bit of fighting capability, and there are reports coming out that they've hit American troops—the 82nd Airborne that arrived in Kuwait. So, I mean, they're not waiting to be invaded somewhere; they're taking the war directly to wherever the troops are. And Kuwait was complaining that they were being attacked by Iran, and these are guests of Kuwait. Well, you know, if you're the platform for a future invasion, don't be surprised if you get hit. Iran is not Saddam Hussein, who sat there for six months believing, for some reason, that he wasn't going to get attacked. Iran's already been attacked, and Iran is doing what it should be doing to defend itself.

## **#Nima**

What's your understanding of Zelensky going to these Arab states to help them? It's kind of amazing to see him go there, because the United States was already there. The U.S. had everything in those countries—had all the influence—and they couldn't do anything. And now, somehow, Zelensky is seen as a superhero for these Arab states, coming to help them. What capability does Ukraine really have when it comes to the kind of help they can offer these Arab states?

## **#Stanislav**

Well, there are two factors at play here. First of all,

## **#Stanislav**

Hi, remember me? Hi, I'm here. Hi.

## **#Stanislav**

Zelensky, yeah—he's no longer on the front page of everyone's news. The coming famine, the ongoing energy crisis in Europe—there's going to be a famine, at least for the lower classes. By midsummer, prices will double, if not triple, for food items, because they're looking at having half the crop they'd normally have. It's already planting season in the south of Europe, and in the north, planting starts in the next week, week and a half, maybe two weeks—and there's no fertilizer.

## **#Stanislav**

Yeah.

## **#Stanislav**

And without modern chemical fertilizers—the whole Green Revolution was built on that—you're looking at half the crop, if not less, especially in a lot of these areas. So there's going to be starvation. I'm not saying whole nations are going to starve, but the lower classes are already having trouble feeding their families. You know, I have a friend, Lorenzo—he's a poli-sci professor in

Italy—and he was telling me half a year ago that a lot of poorer Italian families, and even lower middle-class families, have trouble feeding themselves by week four of the month because the money's gone. And wait till food prices skyrocket, because there's going to be a much smaller crop across the world, across a lot of different countries.

So, you know, Zelensky somehow dropped off the front page, and he needs to be back on it. That's one, because he wants the attention—how can you ask for money if you're not on the front page? And two, he really doesn't want to be inside Ukraine, especially if Russia's leadership finally decides, you know, "Let's get rid of him." He's spent as little time inside Ukraine as possible over the last four years. Zelensky's been doing his tours of Europe, Asia, and wherever else.

I don't think there's ever been a wartime ruler who's spent as little time in his own country as Zelensky has. It's the exception when he's home rather than when he's not. Having said that, how much can Zelensky really help? Well, you know, he's out of ammunition and interceptors inside Ukraine, except for certain areas like the center of Kyiv. So most of Ukraine is now flyover country for anything Russia has. I mean, look, the UAE—unless they were trying to pull some kind of deception trick here—the UAE let the president, Mohammed, M.B.Z., whatever, handle it.

## **#Nima**

Yeah, M.B.Z., Mohammed bin Zayed.

## **#Stanislav**

Ah, bin Zayed, that's it. I couldn't remember for a moment—I'm horrible with names. He let out, that guy let out that, yeah, they're going to grab the islands back from Iran with the Americans. Oh, so Karg Island—the target's going to be, of course, the islands in the Strait of Hormuz. Which are just going to be drone-hunting targets for anybody who lands on them. I feel sorry for those guys, because they're just going to be sent into a meat grinder for nothing. As for the Epstein elites—so they can rape and murder and eat some more children. And apparently the UAE has decided to stop existing, because I'm pretty sure once they're fully in this conflict, Iran is just going to level them.

And if you take out the water desalination plants— you know, I mean, look, the trilateral territories that were the seven sheikdoms that became the UAE—until about 80 years ago, or less than that, really, for the audience that doesn't know—these entities were nothing more than a small mud-brick fort and a small village with a port. That's all there ever was. The majority of the Arab population in that area were Bedouins, nomads. And these small villages, with a small warlord sitting there, later became these modern giant cities that can't feed themselves. One, they don't grow food—very limited in anything they grow. And two, there's no fresh water. There was barely enough fresh water for the villages that were there, and now those villages of a few hundred, maybe a thousand or two thousand people, have grown into cities of four or five million.

You cut off the desalination plants and you'll have mass casualties within a day or two—people dying of thirst in a 45- or 50-degree environment. And if they enter this war, realistically speaking, I think the future of the UAE is going to be post-apocalyptic—half-desert, buried cities. They'll have tours to see something out of *\*Mad Max: The Road Warrior\** or *\*Mad Max Beyond Thunderdome\**—that kind of landscape. Because they're not capable of surviving without these technologies. And if they go into a full war with Iran, of course all that infrastructure is going to become a target—instantly, it's going to become a target. So those entities, I think, are going to die out as political entities. But they seem to be hell-bent on it, for whatever reason. You know, you can't fix stupid.

## **#Nima**

They attacked—yesterday they hit two water facilities in Iran. But so far, from what we've seen, Iran hasn't attacked desalination plants or any kind of water reservoirs in the Arab states or Israel. It seems that, as the commander—the head of the Iranian army—said, they're keeping their focus on logistics, on radars, and on American and Israeli forces. I don't know how long they'll keep going with this approach, because right now, as we discussed, they've attacked power grids in Tehran—for example, parts of the city—and they've also hit universities. What's your understanding of why Iran isn't going after those facilities, and instead is targeting strategic sites?

## **#Stanislav**

Well, Iran yesterday issued a warning to all American and Israeli universities in those other countries. They called it a humanitarian warning—basically saying, "Leave, because we're going to destroy them." They said, "Stay a kilometer away to save your students' lives." So they're going tit for tat, and then some, because if two Iranian steel plants get hit, Iran hits six in return. They're escalating, but they're doing it with warnings—telling people to leave—unlike the Americans or Israelis, who are just hitting plants and hoping to kill as many people as possible. Iran's giving them the warning: get out before we blow it up. If they stay, that's their own problem. But I think Iran has gone after a lot of the oil and gas infrastructure in revenge for its own infrastructure being hit. They haven't hit the desalination plants.

There's one Iranian desalination plant that got hit on Karg Island, where the Americans supposedly want to land. That's right—you don't have enough water there anyway, so let's destroy the water plant. Just like they bombed the airstrip. Now they can't land there if they need to. Lots of intelligent planning right there. But if they go after those desalination plants, any country that goes into a full war with Iran is going to cease to exist. And I think the UAE is going to be that first case—the case in point for everybody else. You know, Bahrain—it looks questionable whether the king is still there, because the revolution is only growing in power. They just recently killed one of the Shia leaders, or activists—they tortured him to death. There were videos and photographs of his body.

## **#Stanislav**

That's, you know...

## **#Stanislav**

In his 20s or something—they just tore him up. So that, you know, I mean, it's stupid. It's heavy-handed and stupid, because when your population is 80% Shia and they're ready to revolt, doing that just pisses them off even more. So you're guaranteed to have a revolution in the government. But countries like Qatar—areas, you know—the damage, I'll tell you, the damage in Qatar is... From my oil and gas supply chain background at Halliburton and Cameron, and then when I was supply chain director on construction projects for Technip, we were expanding part of the Moscow oil refinery to make E85 petro, and we were building one of the three phases of the giant Gazprom Neft LNG plant in Amur. So I know how long it takes for a metal construction.

I know how long it takes for these vessels. Some of them can be up to 78, 80 meters long, all hand-manufactured. Not to mention the logistics—and the logistical nightmares—when you're moving things that big. You know, I know how long it takes to do all this, and how long it takes if the wellheads are damaged, to replace them. And if the wells themselves are damaged, what you can do with them, or if you have to re-drill totally new wells—the timeframes involved. From the pictures I've seen of the hits on the Qatari LNG plants, you're looking at a year and a half to two years—they're going to be down. And if the LNG plants are down for that long, and if it's the wellheads, it may be even longer. And as this goes on, there could be much more damage.

It could be five to seven, maybe eight years to get everything rebuilt. And then you're looking at that—normally you get ammonia out of the gas, use the gas to manufacture fertilizer. Until those gas facilities are up and running, there are steps like drying the gas, cleaning it—drying it from water vapor, cleaning it from all the sand and other gases that are involved, ammonia being one of them. So until all that's back up, you're not going to be getting any fertilizer out of it either. You're looking at, you know, 30% of the chemical fertilizer being gone from the market for three, four, maybe five years. Never mind the LNG—that could be at least a year and a half to two years offline. It may be much worse before this conflict is over.

This disaster level that's already been created for European economies—non-Russian European economies, obviously—and elsewhere is huge. But again, Iran has struck strategically, and it's doing it in parallel while still hitting U.S. bases. So it still has that much capacity, no matter what the Americans are saying. And it's hitting Israel very, very hard. Large parts of Tel Aviv now look like Gaza. Talk about karma. So yeah, they've got huge problems. And Iran has not given up the ghost. It's fighting—fighting hard. It's taking casualties. It's not one-sided. But most of the casualties Iran hasn't taken are civilians being murdered because the U.S. military and Israel can't find the military targets, so they go after civilians, as they do every single time.

## **#Nima**

What do you make of what happened to the Gerald Ford aircraft carrier? There were a lot of rumors—they said it was a laundry room fire, that somehow that was the main problem in those areas. But for an aircraft carrier the size of the Gerald Ford, it's huge. How can anyone imagine that was the problem? It seems the reports show the issue is much deeper than that. What do you make of it?

## **#Stanislav**

Look, there are two issues here. First of all, it's the toilets, and the second one is the fire. I interviewed Cameron McGregor—I'm not going into who he's related to; people can figure that out on their own. Cameron is a former U.S. Navy officer. I heard it from him, and I've heard it from several other people. Look, the toilets are a kind of soft mutiny because the aircraft carrier has been out at sea for 11 months. The crew is exhausted—physically exhausted. A lot of them aren't trained enough. I mean, they're just worn out. Imagine something the size of an aircraft carrier.

You're out there for 11 months. The "soft mutiny" is that when they want to go back, sailors start doing things like flushing T-shirts, ropes, things like that down the toilets, because that blocks up the filtration systems. Then they start to overflow—something like 80% of the toilets overflow. That's a pretty big deal on something the size of the Gerald Ford. About the fire—I talked to him, and he said, "Have you ever heard—first of all, people don't understand this—this ship has thousands of watertight compartments, so they're airtight. They can be closed off so the ship doesn't sink, right?"

It's very hard to sink an aircraft carrier. There's no other reason for that. Thirty hours to put out a fire in a laundromat—and I asked Cameron, "Have you ever heard of something like this?" He said, "No, I've never heard of anything like that. That's not realistic." More than likely, what happened is they got hit. Whatever missile or large drone hit them caused enough damage that it led to a fire that took 30 hours to put out. It's hard to believe it was just one compartment that could have been closed off. Even if it spread, for 30 hours they were still putting the fire out.