

Iran war has hidden U.S. target: China's oil

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The Trump administration's military operation against Iran, ostensibly to destroy a reviving nuclear program and remove regional and global terrorist threats, includes a major side benefit: It will undermine China's oil-based economy and counter Beijing's global anti-U.S. strategy, American experts say. The ongoing war, which began Saturday, has severely weakened the Islamic regime in Tehran. If the regime eventually collapses and is replaced by a pro-Western government, then the result could severely affect China's ability to fuel its economy.

Perhaps more significant is the potential impact on Beijing's drive to expand its anti-U.S. coalition among American adversaries, which is now threatened by the potential collapse of the 47-year-old Iranian regime.

Chinese Communist Party officials have declared in recent years that the party opposes the U.S.-led international order. China, through numerous global initiatives and policies, is seeking a new world order under a communist system of global hegemony led by Beijing.

President Trump has yet to comment on the strategic implications of Operation Epic Fury, including its impact on China. The president plans to visit China next month, and it is not clear whether China will rescind its invitation for the visit in response to the attacks on Iran.

Former Secretary of State Mike Pompeo said that in taking on the Islamic republic, Mr. Trump is directly striking Beijing's main outpost in the Middle East.

"If this regime falls and gives way to a government that actually represents the will of the Iranian people, Beijing can say goodbye to the cheap shipments of crude oil that have helped power its economy," Mr. Pompeo told The Washington Times. "But more than that, it will lose a critical foothold from which to project power in the region and undermine U.S. interests."

China has few domestic oil sources and is heavily dependent on foreign oil imports to fuel its economy.

About 90% of Iran's crude oil is sold to China at low prices and shipped aboard a fleet of ghost tankers designed to evade U.S. sanctions.

After a major source of oil from Venezuela was threatened by the U.S. military raid in January to oust strongman Nicolas Maduro, Beijing now faces the prospect of losing even greater oil supplies from Iran should the Iranian regime collapse.

China's response to the U.S. and Israeli military operation so far is limited to diplomatic protests, despite a comprehensive strategic partnership with Tehran concluded in 2021.

Since then, Chinese oil purchases have totaled around \$140 billion, enough to keep the Iranian regime afloat despite severe losses to Israel last year in the 12-day war.

The China-Iran partnership called for Beijing to invest \$400 billion over 25 years in Iran's energy, banking, telecommunications and infrastructure sectors.

Richard Buck, a China expert, said the U.S. and Israeli military strikes on Iran represent an operational component of a grand strategy to contain China. Loss of oil sources is a centerpiece of the Iran action and the earlier effort in Venezuela.

"Hobbling the regime in Iran serves two purposes," said Mr. Buck, a board member of the U.S. Intelligence Council, a nonprofit group. "The first is to increase the materiel cost for China to buy oil," he said. "China's sanctions busting gets them oil at a steep discount and cements their relationship with Iran."

Second, the military operation will prevent Iran from acting in support of China in a future conflict by effectively sinking its navy. Protecting Western access to the Strait of Hormuz is similarly important.

"Opportunity is a principle of war, and President Trump is a master of it," Mr. Buck said. "He recognizes that there may not be a comparable opportunity to inflict this kind of strategic damage on China's positioning if he does not do it now."

The official Xinhua news agency condemned the attacks that took place as nuclear talks with Iran were underway.

"Should Washington persist in confusing peace with compliance and diplomacy with coercion, it is courting disaster: further inflaming the Middle East while simultaneously dismantling the global architecture it once championed," the agency stated.

The Pentagon said more than 1,000 targets have been hit so far by bombs and missiles, and that strikes will likely continue for weeks.

Defense Secretary Pete Hegseth told reporters Monday that the conflict was not about regime change in Tehran.

However, the opening decapitation strikes by Israel on Saturday killed the regime's supreme leader and more than four dozen senior leaders.

Mr. Pompeo said the administration is showing America's extraordinary military power and willingness to use force, when necessary, as a statement that will not be lost on Beijing, which is contemplating military action against Taiwan.

Zineb Riboua, a research scholar at the Hudson Institute who studies China in the Middle East, said the broader significance of the Iran conflict lies in its strategic impact on Beijing.

"By striking Iran directly, the Trump administration is dismantling, whether by design or by consequence, a pillar of China's regional architecture," she said.

Lu Ruquan, president of the China National Petroleum Corp Economics & Technology Research Institute, told state media that an oil blockade from the Middle East is unlikely to significantly disrupt China's overall oil supply or import stability.

"China's long-standing policy of global diversification allows it to lean on established partners across the Atlantic and in Africa," he told the Global Times. "Suppliers such as Brazil, Nigeria and Angola — all of which have historically been cornerstone sources of Chinese imports — provide a geographical counterweight to Middle East dependency," Mr. Lu said.

China concluded a comprehensive strategic partnership with the regime in 2021 and was bolstering Iran's military in the days leading up to the opening missile and bombing salvos Saturday.

Reports from the region last week revealed that Tehran was close to finalizing a deal to buy Chinese-made supersonic anti-ship cruise missiles that could be used against U.S. aircraft carriers and warships now massed in the region.

China recently supplied Iran with more than 1,000 tons of sodium perchlorate, a key element for missile propellant for Iran's now significantly diminished arsenal of some 3,000 ballistic missiles.

China maintains significant control in Iran through its technology companies, Huawei Technologies and ZTE. Both have been paid more than \$100 million to provide surveillance capabilities for Iran's telecommunications infrastructure.

It was these systems that allowed Tehran to close down the internet during mass protests that U.S. officials say resulted in the deaths of tens of thousands of opponents of the regime.

China also supplied artificial intelligence facial recognition cameras from Chinese companies Tiandy and Hikvision, along with deep packet inspection tools and centralized traffic management systems.

“Iran’s National Information Network, a state-controlled domestic intranet that progressively severs citizens’ access to the open internet, was modeled on the Great Firewall of China and built with Chinese technical assistance,” Ms. Riboua said.

Beijing also imposed costs on the U.S. through Iran’s backing of Houthi rebels that began attacking commercial shipping in the Red Sea in late 2023.

The attacks, in support of Hamas, caused container traffic in the sea to fall by 90%, disrupting an estimated \$1 trillion in commerce.

China failed to use its leverage with Iran to halt the Houthi attacks and declined to join U.S. forces in attacks on the Yemeni rebels that depleted munitions and missile interceptors.

Chinese-flagged vessels passed easily through the contested waters, and China failed to condemn the Houthi attacks and supplied no forces to the multinational protection force that operated in the area.

The funds spent on defending Red Sea shipping reduce support for U.S. submarine production, Pacific force enhancements and elements needed for a defense of Taiwan.

Carriers and warships in the Middle East region reduce the deterrent capability of the American military in the Western Pacific.

For China, Iran and its proxies — supplied with Iranian weapons and backed by Iranian intelligence — operate as an element that can further weaken the U.S. military from deterring an attack on Taiwan.

The military operation against Iran, if successful in neutralizing the regime, will reduce the need to send carriers, warships and warplanes to that region.

Rush Doshi, a researcher at Georgetown University and with the Council on Foreign Relations, said China, for years, has further tied down the U.S. in areas outside Asia.

“China once said that the U.S. invasion of Iraq and China’s accession to the [World Trade Organization] created a ‘twenty-year period of strategic opportunity’ for Beijing to focus on development while the United States was distracted,” Mr. Doshi said. “It’s too soon to tell how the conflict in Iran will turn out, but Chinese analysts are hoping that it pulls the United States further into the region and away from Asia.”

Mr. Pompeo, the former secretary of state, said the key to success will be to “see the operation through” and avoid a deal that would leave remnants of the regime in place.

Doing so would undermine the strategic purpose of Operation Epic Fury, and “we’ll be telegraphing to our adversaries that America doesn’t have what it takes to see the job through,” Mr. Pompeo said.

Reducing the threat posed by Iran and China in the region will allow Mr. Trump and the administration to focus on what many analysts view as the most significant looming confrontation of the current period: China’s plans to take over Taiwan in the coming years.

Miles Yu, a former State Department policymaker for China, said Beijing has made Iran the linchpin of its Middle East strategy for more than a decade. China invested heavily in the economy, integrating Iran into China-led institutions, and relied on Tehran’s regional aggression to distract the U.S. from the Indo-Pacific, he said.

“Coordinated U.S.-Israeli strikes that crippled Iran’s military and nuclear capabilities have shattered that bet, exposed the fragility of China’s anti-American alignment and left its once-central Iran strategy severely weakened, if not collapsed,” Mr. Yu said.

A new Middle East order without Iranian and Chinese control and influence can be better managed with fewer U.S. forces, enabling a shift to the Pacific.

The complete collapse of the Iranian government would remove the largest impediment to the administration’s policy shift that seeks to refocus global security efforts toward the American homeland and counter the looming threat of a conflict with China.

The end of the Islamic regime also would undermine Beijing’s effort to expand its influence from Iran to the rest of the region and beyond and allow a greater strategic focus on the growing dangers in the Pacific region.

Analysts say one solution would be for the U.S. to follow the playbook from Venezuela and set up a legitimate transitional government while rallying international support for ending the theocratic, pro-terrorist system in Iran.

If allowed to survive, Iran under the mullahs would provide China with a second front that would tie down major U.S. forces needed to deter conflict in the Pacific.

The larger issue in the Iran conflict is China. “Remove the Islamic republic from the equation, and China loses its pawns for a Taiwan contingency,” Ms. Riboua said. “Trump’s strikes are the first move by an American president who appears to understand that the road to the Pacific runs through Tehran.”