

Israel and Middle East News Update

Friday, April 11

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- Iran oil exports to China soar in March to 1.9M bpd despite US sanctions
- US targets China oil storage terminal in new Iran-related sanctions
- Syria repurposing refugee camps to absorb hundreds of thousands of Gazans
- Report: US envoy held direct talks with Hamas to try to give Trump win before speech
- Witkoff tells hostage families: 'A serious deal is taking shape'
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Axios

Iran wants to explore interim nuclear deal in talks with U.S., sources say

Iran is considering proposing during talks with the U.S. that the two countries work on an interim nuclear agreement before pursuing negotiations over a comprehensive deal, a European diplomat and a source familiar with the issue told Axios. President Trump has set a two-month deadline for negotiations with Iran on a new nuclear deal — and in the meantime ordered a build up of U.S. military forces in the Middle East as another option if diplomacy fails.

Al-Monitor

Iran oil exports to China soar in March to 1.9M bpd despite US sanctions

Iranian oil exports to China surged in March but could slow down this month amid deepening US sanctions and as the United States and Iran prepare to hold talks, according to recent data and analyses. Various observers noted a significant increase in Iran's oil exports to China in March. Kpler, an analytics firm, put Iranian oil imports from China at 1.37 million bpd last month, marking a five-month high. S&P Global Commodity Insights said in a report last week that Iranian crude oil exports to China's independent refiners reached a record 1.91 million bpd in March, up 19.5% from a peak of 1.6 million bpd in February.

Reuters

US targets China oil storage terminal in new Iran-related sanctions

The Trump administration imposed sanctions on Iranian oil trading networks on Thursday, including on a China-based crude oil storage terminal linked via a

pipeline to an independent refinery, just days before direct talks between the U.S. and Iran. The sanctions came after Secretary of State Marco Rubio said the U.S. will hold direct talks with Iran on Saturday in Oman. President Donald Trump said on Monday that Iran would be in "great danger" if the talks were unsuccessful.

i24 News

Syria repurposing refugee camps to absorb hundreds of thousands of Gazans

Two massive tent cities in northern Syria, near the Turkish border, are being repurposed to resettle hundreds of thousands of Gazans through Turkish and Qatari efforts, Syrian sources told i24NEWS on Thursday. The two camps, one between Al-Bab and Akhtarin, and the other east of Azaz, were originally built during the Syrian civil war to keep displaced Syrians from entering Turkish territory.

Times of Israel

Report: US envoy held direct talks with Hamas to try to give Trump win before speech

The Trump administration rushed to hammer out an agreement in direct talks with Hamas in March to free US citizen Edan Alexander in order to give the US president a win in time for the State of the Union address, The New York Times reported on Thursday. The talks were ongoing even as President Donald Trump reached the US Capitol on March 5 to deliver the address, according to the report. Failing to make a deal, Trump only mentioned the hostages in one brief sentence during his speech.

Ynet News

Witkoff tells hostage families: 'A serious deal is taking shape'

An American-brokered hostage deal may be imminent, according to messages relayed to the families of Israeli hostages. Steve Witkoff, President Donald Trump's envoy to the Middle East, told families he met Thursday that "a very serious deal is taking shape—it's a matter of days." Sources believe that Trump has given Prime Minister Benjamin Netanyahu just a few more weeks to continue the war before he pushes for a comprehensive ceasefire deal.

i24 News

IDF kicks out reservist pilots who signed letter threatening to shirk duty

Major General Tomer Bar, the commander of the Israeli Air Force, on Thursday said that active reservists who signed a letter, threatening not to serve over the current military plan in the war, will no longer be part of the military. The decision was made with the support of IDF Chief of Staff Eyal Zamir, affecting about one in 10 of the 950 who signed the document. The letter called for the immediate release of hostages held in the Gaza Strip, even at the cost of a ceasefire, but the vast majority no longer serve in the military.

Commentary:

Maariv

Blow to His Image

By Anna Barsky

 Prime Minister Binyamin Netanyahu had hoped to rack up an achievement this week in his meeting with US President Donald Trump

- on the issue of the American tariffs. But that was not the reason that he abruptly changed his plans and traveled to Washington instead of returning to Israel from Hungary as a winner (at least in his own eyes).
- The fact that the Americans and the Iranians are very close to starting negotiations was known to Israeli officials. This was the assessment that was presented in recent security cabinet meetings. The illusion about Trump's supposed total support for the military option only remains in blogs written by self-appointed analysts.
- Netanyahu recently spoke to Trump over telephone and was told that the talks would begin this Saturday. Netanyahu's decision not to make do with that phone call but to speak with Trump in person to clarify Israel's red lines was necessary.
- It was important to the prime minister, not to say critical, to meet with Trump personally and to try to persuade him about what demands need to be put to Iran in the context of the agreement that Trump believes in, amid simultaneous hope that no agreement us ultimately reached.
- Contrary to the tariffs, it was clear that Netanyahu could not expect anything immediate regarding Iran, and he only wanted to capitalize on the opportunity. That is why, in the Iranian context, his urgent trip to see Trump was not a waste in substantive terms, only in the terms of optics.
- He successfully got his messages across in the White House, but he did not come away with any achievements. That, among other reasons, may be why Netanyahu did not speak after the meeting with the journalists who accompanied him.
- Not only did he opt out on briefing the journalists after his White House meetings, he even opted out on doing so at a less threatening venue when making the customary public statements a moment before boarding his plane.
- The prime minister did not face the media's cameras, and spoke only to the camera of the Government Press Office. When he has no achievements to show, Netanyahu prefers to mold his own version of reality.
- In his recorded statement, he said that everyone agreed that in the absence of real progress in the negotiations with Iran, the military option would be on the table. In the unmolded reality in the White House, Trump was far more equivocal.

Yediot Ahronot

The Victory that Wasn't

By Yossi Yehoshua

- Just seven months ago, in September 2024, the IDF Spokesperson's
 Office issued an official statement in which it festively announced: "The
 162 nd Division has decisively defeated Hamas's Rafah brigade."
 According to that statement, more than 2,000 terrorists had been killed
 and 13 kilometers of tunnels had been destroyed during the three months
 in which the division operated in Rafah.
- The fact that this statement was not made by a political official shored up public belief that Israel was moving closer to victory.
- A visit to Rafah on the eve of Passover 2025 paints an entirely different picture, one that was also acknowledged by the IDF Spokesman's Office on Tuesday in a laconic, almost casual statement that did not receive the attention that it deserved because of other urgent matters.
- It transpires that the chief of staff held a situation assessment meeting and toured the Morag Corridor. Chief of Staff Zamir, with OC Southern Command Maj. Gen. Yaniv Asor and 36 th Division Commander Brig. Gen. Moran Omer standing by his side, told the troops. "I now expect you to defeat the Rafah brigade."
- Just in case anyone is wondering: no, the Rafah brigade has not risen from the ashes, and that is not the reason why it now has to be re defeated. "The Rafah brigade was not really defeated," said IDF officials. The commanders in the sector, where troops from the 188th Brigade and the Golani reconnaissance unit are fighting, admit that Hamas still has battalions on the ground.
- IDF Chief of Staff Zamir made his remarks to urge them to finish the job that supposedly was finished more than six months ago. Politicians' statements are frequently criticized. One of the most-often criticized was the statement made by the prime minister a year ago, in which he said that Israel was but a "pace from victory."
- But the illusion of Rafah's defeat teaches us—and not for the first time, sadly—about the yawning chasm [between statement and fact] even in military statements, which raises serious questions: what does the public really know about the fighting, about the achievements versus the failures, the objectives that were attained and those that were only conveyed in PR statements? What stories were we told, and how true were they?
- Incidentally, these questions should not only trouble the former chief of staff and IDF spokesperson, but also the current chief of staff and the entire top IDF brass: their statements will also be reviewed with the

- passage of time and every disparity will further erode the public's confidence in the military.
- In his visit to Gaza yesterday, the defense minister announced that the IDF would control the entire swath between the Morag Corridor and the Philadelphi Corridor along the Egyptian border, turning Rafah into a buffer zone. "All of Rafah will be evacuated and there will be a security zone," said Minister Yisrael Katz. "That is what we are doing now."
- The defense budget is quite large, but words are still free, and the question, therefore, is: what is going to happen if and when a ceasefire agreement and a hostage deal are reached. A senior Israel official said frankly: "The moment that Hamas agrees to release 11 living hostages, the fighting will stop immediately."
- Minister Katz went on to say, "More tunnels that run between Gaza and Egypt were discovered and it is therefore clear that our remained presence on the Philadelphi Corridor after this discovery is for security purposes." This statement will also have to be put to the test, certainly in light of the challenges posed by Iran and the challenges vis-à-vis Turkey on the Syrian front.
- One thing that can be learned from yesterday's statements is that the IDF's action against the tunnels was far less effective than the impression that we were given. The IDF's assessment is that only one out of every four tunnels (25%) were destroyed. This fact also begs explanations, which the IDF has found itself hard put to provide at present. We have been aware of the tunnels' importance for nearly 11 years, ever since Operation Protective Edge, and even more urgently so in the horrific situation that was created: even now, Hamas can use its tunnel empire to flee to populated areas.
- Following its loss of the Iranian axis's support, Hamas's ability to manufacture weapons is limited, but one senior IDF officer said, "The blow to Hamas's military wing alone won't get the job done. We have to continue to target the political ranks." This same officer was asked a question that has been haunting the IDF ever since the October 7 assault was repelled and the preparations began for the counterattack: What is victory? His answer, surprisingly, was "the hostages' release and defeating Hamas.
- With 75% of the tunnels still functional, it is unlikely whether a military operation can deliver the first half of that formula. As for the second part, before talking about "defeating Hamas," perhaps we should make sure that this time we truly do defeat the Rafah brigade.