

First week of the 2026 Iran war: extraction results

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DeepSeek (deepseek-flash) extracted events from all 14 morning and evening Iran Updates published from 28 February to 6 March 2026, the first week of the US and Israeli strikes on Iran [1]. Q4_System_Design.pdf describes the system.

Results in brief

- All 520 narrative paragraphs (309,100 characters) were covered, in 71 chunks; one chunk needed a repair round.
- The model extracted 76 event mentions. Review against the cited paragraphs kept 59 and removed 17: 14 had no direct economic link in the passage and 3 repeated another mention in the same report. Fields were corrected in 46 of the 59 kept mentions, most often the impact description (21), the event type (14), the claim status (13) and the uncertainties (13).
- Over the week the reported channels move from shipping risk to energy production and storage, and then to downstream products such as fertilizer.
- The budget ledger records 80 requests, 72 of which produced the records reported here, with 403,064 input and 52,964 output tokens in total: CNY 1.23 at peak list prices [3], against a budget of CNY 10.

Corpus and coverage

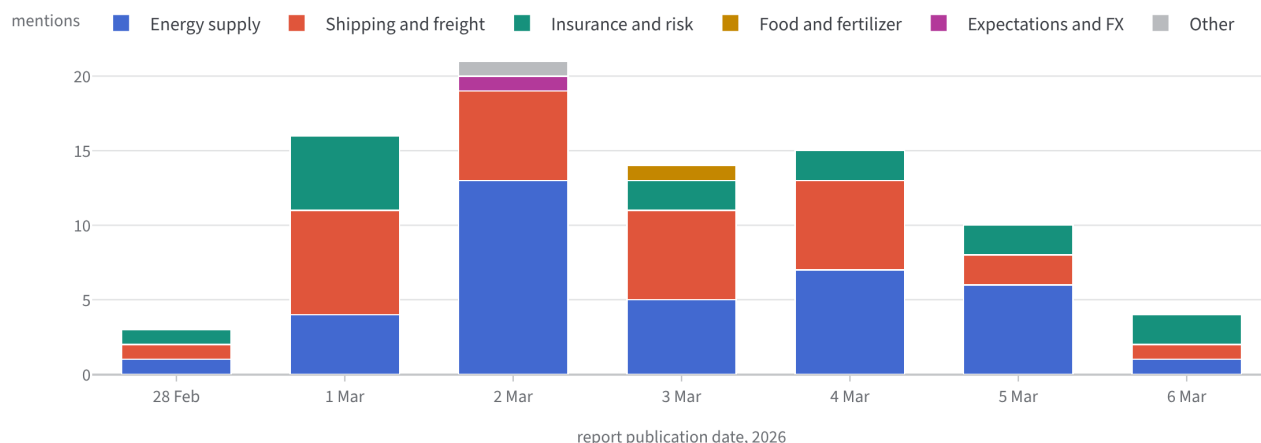
The 14 reports were saved from the official Critical Threats pages as rendered pages on 18 October 2026, each with its URL, retrieval time and SHA-256 hash (data/isw_sources/). The parser keeps headings, paragraphs and lists in their original order and stores the bibliography separately with its links; images and maps are kept as links.

Publication date	Reports	Paragraphs	Chunks	Mentions extracted	Mentions kept
2026-02-28	2	66	8	4	2
2026-03-01	2	68	11	11	7
2026-03-02	2	82	12	22	18
2026-03-03	2	94	11	14	10
2026-03-04	2	83	12	14	12
2026-03-05	2	78	9	9	8
2026-03-06	2	49	8	2	2

Method

The model was called with thinking disabled, JSON output mode, temperature 0 and the full JSON Schema in the system message [2]; every answer was validated in code against the Pydantic schema and the exact-quote check. The prompt keeps an event only when the passage gives a direct economic link: energy assets or supply, commercial shipping and ports, trade or sanctions, food or fertilizer, or a stated effect on prices or demand. Military events without such a link are left out, and threats, attacks, damage and stoppages are kept apart. Each mention was then reviewed against its cited paragraphs for relevance, quotation, attribution, event type, date and quantities, with LLM assistance; the decisions are in data/isw_live/review_decisions.json. Corrections are applied to an analysis copy, and the model's original output stays unchanged in the records.

How the reported channels changed



Kept mentions by transmission channel and report publication date.

2026-02-28. Ship-tracking data (MarineTraffic) show commercial traffic through the Strait of Hormuz down 70% after the US and Israeli strikes began, and an EU official reports an IRGC warning that no ship may pass. Iran had not yet attacked vessels and there was no evidence of an attempted blockade. Sources: [2026-02-28 evening](#).

2026-03-01. Warnings turn into attacks: UKMTO reports projectiles hitting or exploding near three vessels off the UAE and Oman, and the IRGC claims strikes on three US- and UK-linked tankers. Persian Gulf vessel traffic is reported down at least 33%, with large crude tankers diverting or stopping. Iran's foreign minister says Iran has no intention of closing the Strait at present. Sources: [2026-03-01 morning](#), [2026-03-01 evening](#).

2026-03-02. The disruption reaches energy production. QatarEnergy halts LNG output after drone attacks on Ras Laffan and Mesaieed (Qatar supplies about 20% of global LNG), Saudi Aramco shuts the Ras Tanura refinery as a precaution after an attempted drone strike, and oil companies in Iraqi Kurdistan stop production as a precaution. Sources: [2026-03-02 evening](#).

2026-03-03. Effects spread downstream and into storage. QatarEnergy halts urea, polymer, methanol and aluminium production, and Iraq stops output at the Rumaila field because storage is filling while tankers struggle to leave the Gulf. The US offers political-risk insurance and guarantees to shipping lines and may escort tankers. Sources: [2026-03-03 morning](#), [2026-03-03 evening](#).

2026-03-04. Logistics restrictions widen. Maersk suspends cargo bookings to and from seven Gulf states, except Salalah, Dammam and Jubail; Hormuz vessel traffic is reported down about 90%; Qatar has fully shut down liquefaction, and a return to normal LNG production and exports is expected to take at least a month. Sources: [2026-03-04 evening](#).

2026-03-05. Strikes cause fires at energy facilities: a drone hits a power generator at Iraq's Sarsang oil field and missiles hit Bahrain's BAPCO refinery. The tanker Sonangol Namibe is hit off Kuwait. Saudi Arabia moves crude exports to the Red Sea by pipeline, which only partly offsets the loss of Gulf routes, and Iranian cargo and crude loadings continue. Sources: [2026-03-05 evening](#).

2026-03-06. UKMTO reports a strike on a tug assisting the cargo ship Safeen Prestige in the Strait, the 13th maritime incident there since 28 February. Militia rockets and drones target an oil field and an oil company headquarters in Basra, with no reported damage to production. Sources: [2026-03-06 evening](#).

Track energy and fertilizer prices alongside freight and insurance rates. Mention counts measure how much the reports discuss a channel, not the size of a disruption; estimating the CPI effect also requires price data, CPI weights and pass-through assumptions.

Files and reproduction

Path	Content
data/isw_sources/	The 14 saved pages, their metadata and the source manifest
data/isw_live/records/	One record per report: article, every chunk with its attempts, token usage and events
data/isw_live/chunks/	Cache of accepted chunks, used to replay the run without model calls
data/isw_live/review_decisions.json	Review decision, annotation and field corrections for each mention
data/isw_live/reviewed_events.csv, daily_channels.csv	Analysis tables
data/isw_live/deepseek_budget.json	Budget ledger: every request with its reservation, usage and cost

```
python scripts/check_q4_offline.py # re-parse sources, validate records, replay from cache offline
python scripts/build_q4_analysis.py # apply the review decisions, rebuild the tables
python scripts/build_q4_timeline.py
python scripts/build_q4_report.py
```

Limitations

- The pages were saved in October 2026 and may include later edits; the dates used are publication dates.
- The review was LLM-assisted. Precision and recall need the labelled sample described in the design document.
- Each chunk is extracted without the rest of its report, so a summary paragraph and the body can describe the same incident: mentions are not independent incidents.

References

- [1] Critical Threats Project. Iran Updates. <https://www.criticalthreats.org/analysis/ctp-iran-updates>
- [2] DeepSeek. Chat Completions API. <https://api-docs.deepseek.com/api/create-chat-completion/>
- [3] DeepSeek. Models and pricing (CNY). https://api-docs.deepseek.com/zh-cn/quick_start/pricing/

Web sources accessed on 18 October 2026.