

## The real risk of system breakdown

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There are mornings when I scan the news, reflect on what is happening in the world, and then come up with no connection between what the news is reporting and what I feel is going on. This morning is one such day.

Some of the issues that I think are significant, from Trump's delusions to Orbán's demise and the void between reality and what the far-right political agenda is trying to impose upon it, are in the news.

The Guardian makes its morning feature of the day the growth in absolute poverty in this country, highlighting reports that are already months old that note the difference between absolute and relative poverty, and pointing to the government's failure to address the issue.

As evidence of that last point, the Financial Times talks about how Rachel Reeves is considering changing the UK tax system to lower the potential taxes of those who are now fleeing Middle Eastern states but who wish to continue to have the opportunity to pay little or nothing to the jurisdictions that provide them with the opportunity to accumulate wealth at cost to others, and the planet, without making any contribution in return.

And, everywhere I look, there is a surreal lack of political reality about what is really happening in the world, and what its consequences will be.

The fact is that military tensions in the world are rising significantly. The US threat to block shipping seeking to pass through the Strait of Hormuz by agreeing to Iranian terms of trade is real and significant.

Trump may be trying to sanction Iran, but Iran is not the aggressor in this war. Trump is, and there are, quite reasonably, many countries that will not agree to be bound by sanctions imposed by Trump when they never agreed to partake in his war, which itself was always illegal, as his sanctions are under international maritime law.

China, Pakistan, India, and many Southeast Asian countries are critically dependent on

Iranian oil to keep their economies functioning. Without that oil, critical problems will develop in all these economies, and China in particular is not willing to suffer those consequences for the sake of Trump's vanity, delusion, aggression, Zionism and illegality.

If he persists with his actions, there is a very real risk of military conflict in the Gulf of Oman, spreading into the Indian Ocean and beyond. Look for mention of this in the media, however, and it is nearly absent. It is as if the West still cannot comprehend that it no longer sets the agenda, and that other countries have legitimate interests that the West must acknowledge. The conclusion is obvious: like Trump, the Western media is deluded as to the state of the world.

The same is true of economic commentary. The Financial Times reports that China had reduced exports in the last quarter, but did little to extrapolate that fact to what might happen now when the heavy diesel fuel used to drive the world's sea-borne trade, most especially from China, moves into very short supply, as it is already doing, a trend that will be exacerbated by what Trump is seeking to achieve with his blockade.

This is not just an issue for the Chinese economy. Our economy is heavily dependent on what happens in China. From cars to electronics to many of the small components that are absolutely critical in most manufacturing processes and can entirely disrupt them in a world built on just-in-time manufacturing, China is a major, and in many cases the sole, supplier of items on which the UK economy is utterly dependent. If these products cease to flow, the scale of disruption in the UK economy will be massive. Things will go wrong, and we will not be able to put them right. People will want to buy things, but they will not be there to have them. Those who make things will not have the components that they need.

I have focused to date on the massive and potentially catastrophic disruption to global food supply chains that I think this conflict will cause, and nothing has yet changed my mind on the priority of this issue. The absolute poverty that millions already suffer in the UK could get very much worse, very soon, as a result.

Yesterday, I saw a clip of the former Chancellor of the Exchequer, Jeremy Hunt, telling the media that we had better get used to the fact that, even if governments want to address the issues that arise as a result of this war, markets "will not let them". It is possible to suggest that any comment from any Tory is now utterly irrelevant, so discredited are they as a party, but what he said does probably reflect thinking in the UK Treasury, the City of London, and in Rachel Reeves' mind. That is precisely why I talk of a coming catastrophe, and even compare it with the great starvation that happened in Ireland in the late 1840s. That event was wholly unnecessary. There was enough food for everyone in Ireland at the time, but there was a lack of political will to ensure it reached those who needed it. That is the situation that I fear we will face again. The likes of Jeremy Hunt will deliver that outcome.

Simultaneously, I am suggesting that the likelihood of a major economic breakdown due to the collapse of many complex, long-distance component supply chains worldwide, many of which emanate from China, is now high, and Trump is trying to ensure that this is the case.

If Trump's actions continue for only another week or two, the world food catastrophe will almost certainly happen. The fertiliser required during planting seasons will not be in the right place at the right time, and the consequence is that either crops will not be planted or yields will tumble, partly as a result of sailing at reduced speeds, which will guarantee massive shortages.

Food is, of course, fundamental to life. That is why I will continue to talk about it. But, at the same time, the ships that departed China before this crisis really began to emerge will soon be arriving at their destinations, wherever they are heading in the world. The risk is that others will, quite literally, not be following in their wake, and if they do, they will arrive late as a result of sailing at reduced speeds to preserve fuel, creating delays that will also disrupt production processes.

To suggest that we are heading for a period of economic chaos is not, in that case, to be sensational, but to be realistic. Without a miracle (and, to be honest, I do not really believe in miracles, least of all those performed by Donald Trump with his own form of divine power), that disruption is now inevitable.

Is anyone, however, discussing this in the media this morning? I cannot see that they are. Rachel Reeves is, as I have noted, more interested in attracting exiles than in putting in place the measures required to ensure that people in this country have food and that the prospect of a functioning economy is maintained.

Quite literally, small-minded people like Reeves find it impossible to comprehend a system breakdown of the sort that we are likely to face as a consequence of the actions of Trump and Netanyahu. They sweat the small stuff instead. We are all going to pay a heavy price for that.