



RiskIntelligence

Monthly Intelligence Report

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Monthly Intelligence Report

This report includes an overview of attacks against merchant vessels over the past month in three focus regions (West Africa, the western part of the Indian Ocean and South East Asia) as well as assessments of different types of threats in these regions. These areas are currently considered to be the global regions where the threat of such attacks is most significant.

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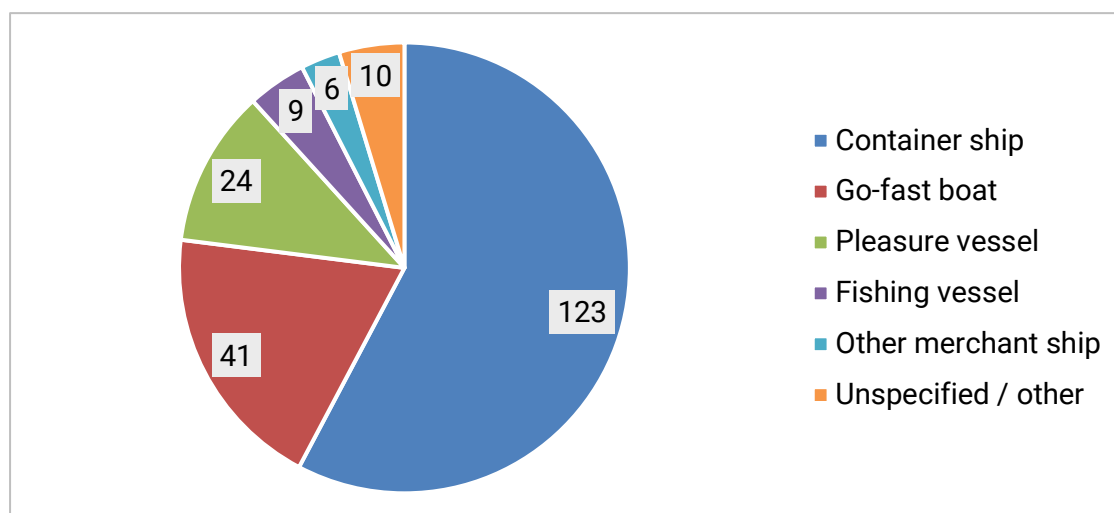
Monthly focus: Cocaine smuggling on merchant ships

Introduction

Cocaine trafficking has developed into a major concern for the shipping industry and public authorities. Every stage of the supply chain is susceptible to being affected, infiltrated, or influenced by drug traffickers, exposing a large number of stakeholders to the threat. As cocaine production and demand have surged in recent years, drug traffickers have discovered new platforms and routes to expand their operations.

The latest data gathered by Risk Intelligence confirms trends observed by several organisations in recent years and provides an in-depth look at the day-to-day implications for merchant ship operators. Detailed information can be found in Risk Intelligence's new quarterly report on cocaine smuggling patterns with the first issue being released this month.

By and large, container ships are the most frequently targeted vessels due to their size and the logistical advantages of containers. Put simply, it is easier to trace and identify a container in which drugs are hidden than other types of cargoes.



Number of cocaine seizures worldwide on different types of vessel between May and August 2023 (Data collected by Risk Intelligence)

While go-fasts are also a highly publicized means of transporting drugs, they are used for shorter journeys, mainly to transport cocaine to North America within the Caribbean arc, or to a transit zone such as Panama, where the drugs are then transferred to larger vessels or to other locations in the Caribbean. However, prior to a transshipment, this modus operandi will not have a direct impact on merchant ship operations.

In addition to the types of targeted vessels, drug traffickers are constantly innovating and adapting to hide their illegal cargo. Many different methods are used, such as concealing illegal substances in containers without the shipper knowing or using certain parts of the ship to hide the drugs (in the hull, on the deck, under the bow as well as inside air vents and below the waterline), often in cooperation with one or more crew members.

The routes to Europe

The size and high freeboard of container ships and bulk carriers make them ideal vehicles as they offer numerous opportunities for concealment, both in the cargo and in the ship itself. These vessels are mainly used for the transatlantic route to major European ports, led by Rotterdam, Antwerp, and Hamburg, while smaller, more agile vessels are more often used for routes between the Americas. In addition, yachts and fishing vessels are used to transport cocaine from South America to the Azores, Cape Verde, the Canary Islands, and West Africa.



Around eight tons of cocaine were seized in a banana shipment by the Dutch police in August 2023 (Photo: Netherlands Public Prosecution Service)

At the same time, as indicated in the latest Europol report published in March 2023 and confirmed by our statistical analysis, medium-sized ports in Europe are increasingly used, including ports like Helsingborg (Sweden), Vlissingen (Netherlands), Zeebrugge (Belgium), or Algeciras and Valencia in Spain. Tanker and container vessels calling at these ports are on average smaller than in the main European hubs. Due to the inclusion of these alternative destinations, vessels chosen by cocaine traffickers are therefore likely to include virtually all sizes.

Departure points

As far as the main production and departure areas are concerned, Brazil is a major hub for drug smuggling to Europe. Cocaine from Brazil is mainly transported in containers, but fishing boats and bulk carriers are also used, particularly for transfers at sea close to territorial waters. The ports of Santos, Paranaguá and Navegantes are used most often. Corrupt port officials as well as links between cartels and these officials play an important role.

Colombia remains the world's largest cocaine producer, responsible for around 60% of global production. Drug trafficking mainly affects ports such as Santa Maria, Cartagena, and Barranquilla. In addition, semi-submersibles are increasingly being used to transport cocaine from the Colombian coast to Central and North America.

Meanwhile, Ecuador offers fertile ground for international cartels because of its proximity to cocaine-producing countries and its fragile political and economic situation. Ecuador is the

world's largest banana producer. The modus operandi of drug trafficking in Ecuador is therefore largely based on cocaine, often concealed in banana shipments destined for Europe via the Panama Canal. In addition, the widening of the Panama Canal in 2016 has unintentionally affected drug trafficking routes, leading to an increase in seizures at major European ports. New smuggling routes from Colombia to Panama have also emerged, often involving go-fasts carrying cocaine to Panama, which is then smuggled onwards in containers.

Mexican cartels dominate cocaine distribution in the United States via maritime traffic along the Pacific coast. They use a variety of vessels, including go-fasts and semi-submersibles. Mexico also produces methamphetamine and other chemical drugs, most of which reach the United States by land. Recent developments also suggest an increase in drug smuggling via containerized cargo along the Gulf of Mexico. Mexico is a key transit and gateway country and has therefore joined international efforts to combat drug trafficking, particularly in containers.

Summary

Whatever the area under consideration for specific types of operations, the main threat for merchant ship operators lies in the ports where workers, service providers, brokers, handlers and other personnel are potential targets for organised criminal groups. In ports across Europe and South America, customs officers and dockworkers are being recruited by criminal groups, highlighting the growing influence of these networks.

For the European side in particular, Europol's latest report on the subject, published in April 2023, provides an interesting overview of the complex logistical organisation of ports and their infiltration by criminal networks. These concerns are further highlighted by data collected by Risk Intelligence. The new quarterly report containing the data will therefore be a valuable addition for efforts to mitigate risks linked to cocaine smuggling on merchant ships in international trade.

Additional services

The Risk Intelligence System provides clients with real-time intelligence and situational awareness that will assist in avoidance of threats for operations around the globe. Moreover, Risk Intelligence offers ship operators the possibility to purchase security intelligence for individual ports and terminals. Bespoke services such as vessel-specific or voyage-specific risk assessments can also help to determine and to mitigate persistent or emerging security threats and risks.

In addition, frequent webinars provide in-depth updates, mini masterclasses in situational awareness methodology, and analysis of current events. Schedules and registration forms can be found at riskintelligence.eu/webinars.

Update: Maritime dimensions of the war in Ukraine

Situation on land

The war in Ukraine continues to influence the security environment in the Black Sea region, with Russia continuing to target Ukrainian civilian infrastructure across the country. In September, Russian military continued the shelling of Ukrainian port facilities on the Black Sea coast and the Danube. The degree to which future port operations will be affected is difficult to verify – although ports facilities in Odessa seem to have been significantly damaged during recent attacks.

Ukrainian offensive operations continue to make progress in various locations, although verified details are sparse. Fighting remains concentrated mainly in the southern and eastern regions of Ukraine. The overall threat picture is volatile and is assessed to vary depending on locality.

Black Sea

In September, various Russian military operations targeting Ukrainian port infrastructure were reported, including Odessa and the Danube ports of Reni and Izmail. Further attacks are likely, which points towards a strategy of deliberately targeting port infrastructure relating to Ukrainian grain exports through the Black Sea. Russia's foreign minister Lavrov recently announced that the Black Sea Grain Initiative (BSGI) was no longer a viable option. This follows the Russian withdrawal in July. It is currently unlikely that any new incarnation of the BSGI would be agreed.



Bulk carrier BRAVE COMMANDER loading at the port of Pivdenny (Photo: Ministry of Infrastructure of Ukraine)

The corridor announced by Ukraine, initially for the departure of vessels in the ports of Odessa, Chornomorsk and Pivdenny, has been used for seven transits, five of which involved ships that had been stranded since the outbreak of the war. The circumstances of the voyages vary and it is currently impossible to establish a definite pattern in the voyages. It therefore remains too early to proclaim any proof of concept for universal safe passages through the corridor.

Warnings by Russia – and subsequently Ukraine – to merchant ships against transiting to Ukrainian and Russian Black Sea ports remain in place. Such vessels would be seen as parties to the war and potential military targets. It is unclear whether such warnings will be acted upon. However, the boarding of the SUKRU OKAN by Russian military personnel and other incidents indicate that an intervention of some kind cannot be ruled out. Furthermore, the continued targeting of Ukrainian Black Sea, Crimea and Kerch Strait infrastructure raises the likelihood of collateral damage for vessels at berth.

The ongoing presence of military assets in the north-western Black Sea underlines the threat from military operations. The north-western part of the Black Sea near the Ukrainian and Crimean coasts, including the Sea of Azov and the Kerch Strait, are still assessed as prohibited areas of navigation, as announced by Russian officials. Ukraine has announced that vessels operating at the Russia Black Sea ports Novorossiysk, Anapa, Gelendzhik, Tuapse, Sochi and Taman would be seen as aiding the Russian war effort.

Vessels transiting the Kerch Strait and Sea of Azov are assumed to have Russian permission. The operational status of the Ukrainian ports of Berdyansk and Mariupol remains disputed with Russian officials claiming both ports are open and operating. Ukrainian authorities have previously stated that they would remain closed until again under Ukrainian control. Nevertheless, the ports have seen some traffic which allegedly includes Russian-coordinated transports of stolen Ukrainian grain as well as seized metals and metallurgical products.

During the past month, Ukraine has intensified its military focus on the Crimean peninsula. This means that the immediate threat towards Russian Black Sea ports has increased. While direct targeting of civilian vessels must be taken into account, the escalation of attacks against Crimean maritime and port infrastructure is likely to drive more like-for-like targeting of ports and maritime infrastructure. It is therefore assessed that the general threat picture has become increasingly volatile, particularly regarding collateral damage or mistaken targeting of merchant ships.

The regional impact on maritime trade remains varied. Reports highlight ongoing threats from drifting sea mines in the Black Sea, although the actual extent is difficult to determine. The threats from drifting mines and wider concerns of collateral damage are likely to continue at least for the duration of the war.

Port operations / deal on grain exports

Aside from Ukrainian Black Sea ports, Ukrainian Danube ports are operating. However, delays and operational disruptions have been reported following Russian attacks and other operational disruptions such as weather and pilot shortages. Russian missile and drone attacks continue to target Ukrainian civilian infrastructure, future delays and disruptions cannot be ruled out. Local weather conditions also increased the possibility of drifting sea mines in the Black Sea.

The BSGI remains suspended and unlikely to be revived. Although Ukrainian Black Sea ports are understood to be closed to normal operations, Odessa, Chornomorsk and Yuzhny have all handled vessels which have used the 'Humanitarian Corridor' as announced by the Ukrainian Navy. The vessels in question, an announced total of seven, all appear to have been using the

corridor on a case-by-case basis. Therefore, at present, there appears to be no formal procedure for utilizing the announced corridor.

Summary

Throughout September, Russian attacks on Ukrainian Black Sea and Danube coastlines continued, as did Ukrainian efforts to target Russian Black Sea port infrastructure and more widely the Crimean peninsula. A similar focus by both sides is likely to continue as part of a wider strategy by both Ukrainian and Russian forces to limit the Black Sea trade by both countries. The continued targeting of Ukrainian port infrastructure is likely to complicate any export efforts.

The Ukrainian offensive is ongoing with some success, albeit at a slower pace than western backers had hoped for or perhaps expected. Both sides are attempting to position themselves ahead of the coming winter months. Future attacks against maritime infrastructure – similar to previous attacks on the Kerch Strait bridge – are therefore likely. It remains unclear to what degree Russia or Ukraine would enforce the announced threats of seeing vessels transiting to each other's Black Sea ports as potential military targets. However, circumstances are most likely to be individual rather than a blanket approach.

Diplomatic breakthroughs, ceasefire agreements or any return to the previous regional security situation in the Black Sea are unlikely in the near term. The volatile nature of the war means that the security situation can change on short notice. Any major successful offensive operations by both Ukrainian and Russian forces appear unlikely, but if they should occur will likely have a wider impact on the general security situation, including the maritime environment.

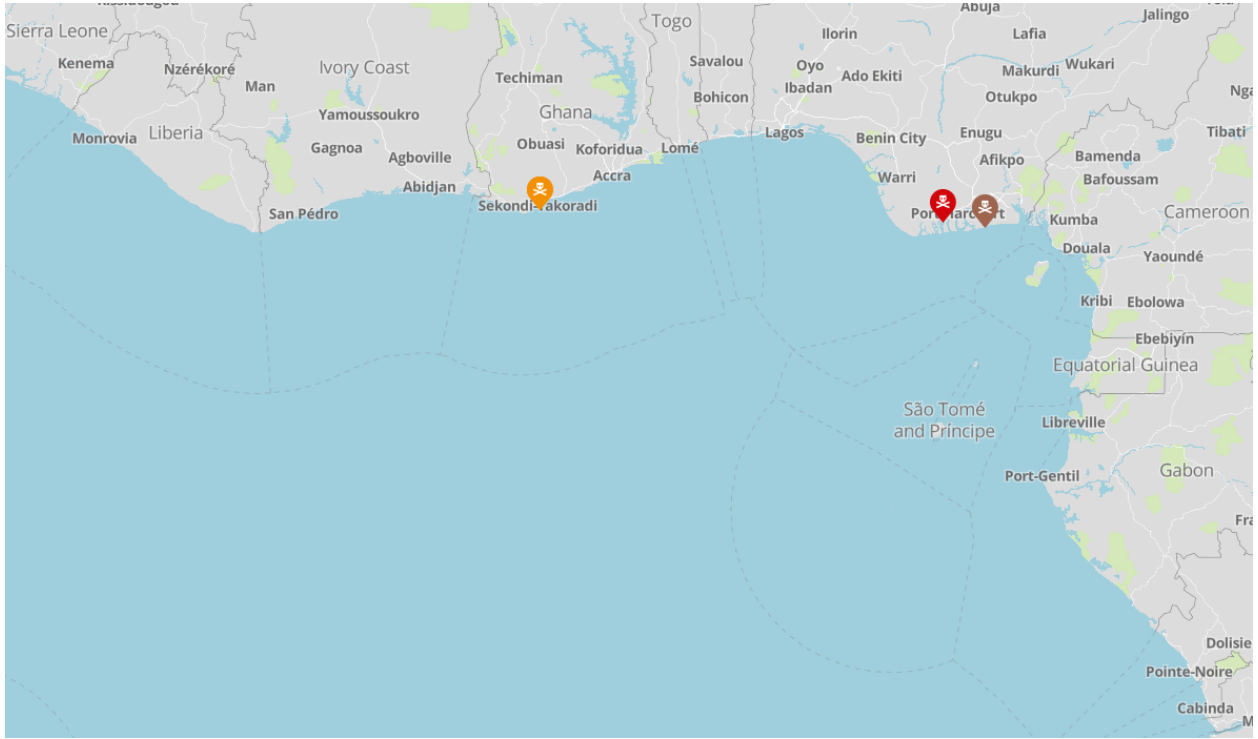
Merchant ship operations have to take the possibility of collateral damage into account. Potential hazards caused by sea mines and other forms of collateral damage should also be considered. The impact of future Ukrainian and Russian operations is uncertain and should be monitored closely. Risk Intelligence strongly recommends conducting thorough threat and risk assessments prior to any transit and to update contingency plans according to the current situation.

Further information

Risk Intelligence provides a weekly threat assessment for ports in the northern part of the Black Sea, covering both the operational and security situation. In addition, the report provides a concise overview of the current situation in Ukraine and the northern Black Sea, including constantly updated information regarding the status of exports of grain and other bulk cargoes from Ukrainian ports.

West Africa

Events included in this report occurred between 1 and 30 September 2023, shown on the map below (Source: Risk Intelligence System).



Incidents

04 September – Supply vessel MAERSK LOGGER boarded

Theft Luanda anchorage Angola 03:15 LT (02:15 UTC)

05 September – Ports hit by two-day industrial action

Activism Nigeria (various ports)

11 September – Supply vessel MAERSK LOGGER boarded

Armed robbery Port of Lagos Nigeria 00:35 LT (23:35 UTC on 10 September)

Assessment

Nigeria / Niger Delta

Attackers operating off the southern and eastern Niger Delta remain the most significant threat in the Gulf of Guinea. Relatively few security incidents have been reported over the past 24 months but the threat level was underlined by several high-profile incidents between March and May. Attacks against local vessels in or near the Niger Delta also remain frequent, highlighting the fragile security situation.

Crude oil theft and sales of illegally refined petroleum products reached record levels in 2022 and have remained in a similar range in 2023 to date. Such operations have provided constant revenues to organised criminal groups for years yet profit margins started to increase significantly in the wake of the Covid-19 pandemic. Nigerian oil production and export levels even fell to historic lows in April 2023 and remain depressed, resulting in revenue shortfalls for Nigeria's government.

In a bid to improve the security situation, Tinubu and several high-ranking government officials have shown an increasing interest in ongoing operations across the Niger Delta. However, this had led to frictions between the military and Tantita Security Services, a company which is ultimately controlled by a former Niger Delta militant leader. In late August, the Nigerian Navy even arrested five Tantita employees, claiming that they had been involved in crude oil theft.



Five staff members from an anti-oil-theft security firm after their arrest by the Nigerian Navy (Photo: Social Media / X)

In August 2022, Tantita had been awarded a controversial contract to combat oil-related illegal activities. The new government under President Bola Tinubu has not made any clear statements regarding the potential renewal of the contract. Any decision is likely to have important consequences for security in the Niger Delta where the situation is already fragile.

The overall situation in the region is closely linked to oil and gas revenues which are crucial for the federal and state-level budgets. Short-term improvements may be useful to boost crude oil

production and to finance additional expenditures, especially on the federal level. However, "paying off" criminal groups in the Niger Delta through security contracts has not been a successful long-term strategy in the past. Maritime operators should therefore monitor developments which may include an uptick in attacks against merchant ships at sea in the coming months.

Successful boardings of merchant ships remain most likely on "low and slow" types such as small bulk carriers or product tankers, offshore supply ships or fishing vessels. However, other vessels may also be targeted. Weather conditions during the dry season – which will last until about April – make it possible to operate small boats even deep offshore. Attacks may therefore take place at significant distances from the coastline.

For ongoing operations, crew vigilance and measures recommended in *BMP West Africa* remain important to mitigate risks. This may include the use of security escort vessels off Nigeria. These can be offered by several dozens of companies which have signed a memorandum of understanding (MoU) with the Nigerian Navy; the most recent version of this document was officially published in June 2021. The MoU remains the legal basis for additional security measures employed in the Nigerian maritime domain (territorial waters and EEZ). MoU signatories are authorised to provide escort vessels partly manned by naval personnel which cannot operate outside of Nigeria's EEZ.

In addition, it is vital to analyse security-related incidents. Several cases over the past 24 months involved vessels which are solely trading within the region. Such incidents are unlikely to be genuine pirate involving random targets. Overall, it is important to recognise piracy as merely one symptom of insecurity at sea which is closely linked to other organised criminal activities.

In Nigeria, attacks against local shipping or military patrols highlight that kidnappings and other criminal activities remain a security threat which may affect merchant ships again in the coming months. Two incidents in August highlighted the threat for local shipping. Main hotspots for organised crime are Delta, Bayelsa, Rivers and Akwa Ibom states.

Forecast

The threat level in the coming month remains severe off the Niger Delta, despite limited numbers of incidents in recent months. Attacks are possible at distances of up to 250 nm from the coastline, particularly under favourable weather conditions during the dry season which is set to last until about March. All ship types may be targeted.

Inshore attacks against local passenger and cargo vessels or against military detachments remain a threat across the Niger Delta, underlined by various incidents in recent months. Such attacks are not a direct concern for merchant ships in international trade, but crews must be vigilant during river transits in the Niger Delta.

Gulf of Guinea (Côte d'Ivoire to Gabon) / West Africa (Senegal to Angola)

Maritime incidents in September were limited to two incidents targeting vessels at the Luanda anchorage (Angola) and at berth in Lagos (Nigeria). Similar to most of these cases across the region, the perpetrators escaped when they were discovered by the crew, although they were successful in stealing some items. Violence against crew members is rare during such incidents which are usually aimed at stealing easily accessible items on deck.

Overall, the number of maritime security incidents in recent months remains low compared with previous years. Despite this improvement, limited naval and law enforcement capabilities as well as a lack of cooperation between different agencies on the national and regional level remain issues which have a negative impact on maritime security.

Limited financial and human resources will remain another concern for navies across the region in the coming years. Maritime operators should therefore not interpret a low number of incidents as a significant reduction of the threat level. Criminal activities at sea remain closely linked. Illegal fishing, smuggling as well as other illicit operations have even increased in the recent past. Alleged pirate attacks may also be a cover for other types of illicit activities.

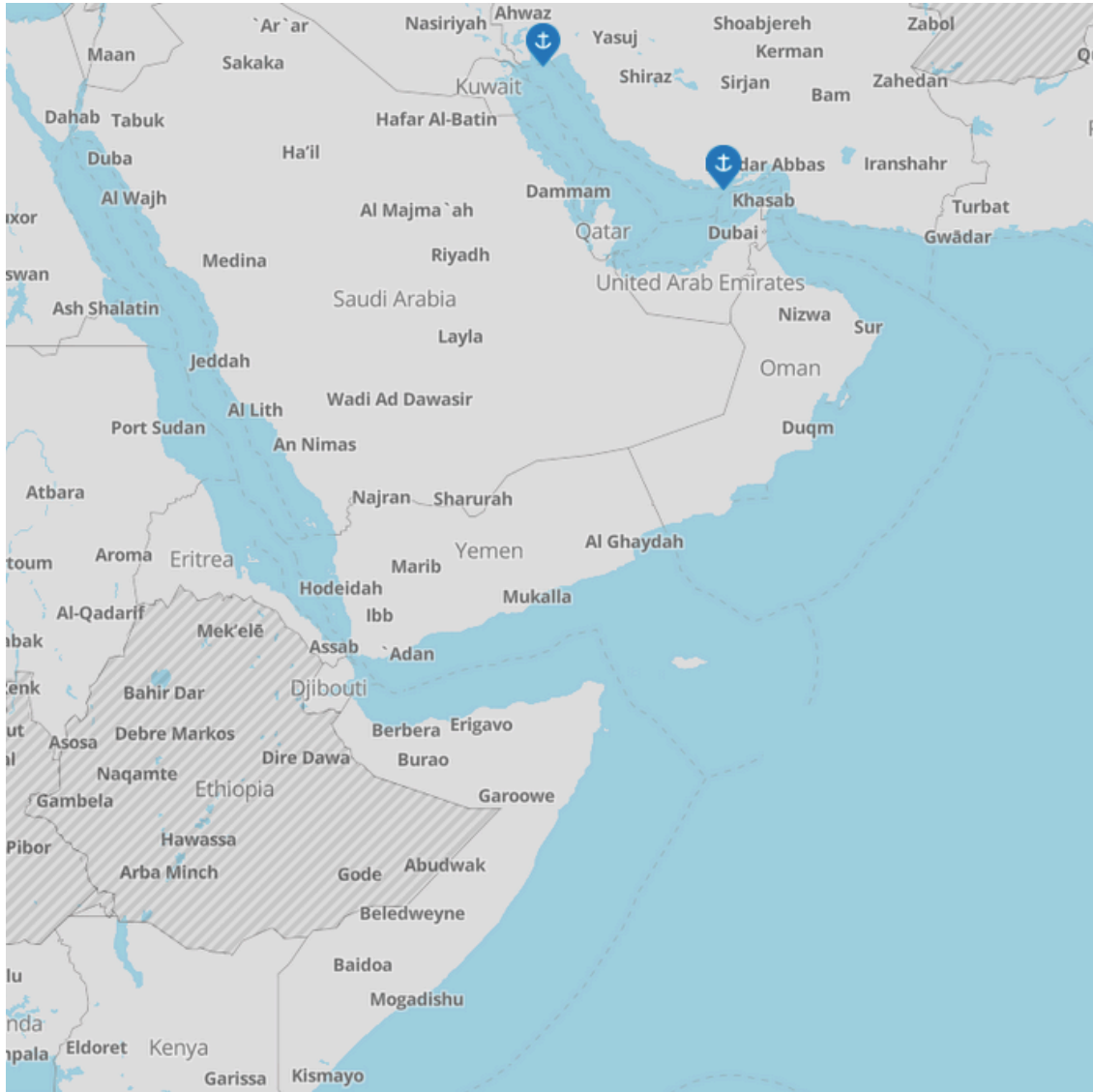
Forecast

Throughout the Gulf of Guinea, the threat of kidnap-for-ransom attacks is assessed as moderate to high for the coming month, depending on the distance from the Niger Delta coastline where perpetrators can protect hostages from security forces and rival gangs during ransom negotiations. The threat level for vessel hijackings is assessed as low.

In West and Central Africa as a whole, perpetrators may try to board berthed or anchored vessels. Around most anchorages, the amount of small boat traffic is virtually impossible to control for security agencies. Threat levels vary between different ports, but perpetrators will generally escape upon discovery.

Western Indian Ocean

Events included in this report occurred between 1 and 30 September 2023, shown on the map below (Source: Risk Intelligence System).



Incidents

02 September – Vessel reportedly seized for smuggling

Naval operation Persian Gulf

13 September – Iranian forces detain vessels for smuggling

Naval operation Persian Gulf

Assessment

Southern Red Sea – Gulf of Aden

This area covers shipping routes which are potentially affected by the conflict and political dynamics in Yemen. Threats for vessels in transit are generally low; piracy is highly unlikely in the southern Red Sea and unlikely in the Gulf of Aden. Vessels should expect encounters with local traffic, which might be fishermen, traders, or smugglers (or all three). Skiffs will often pass close to merchant ships with the crew likely to be armed.

Yemeni and Eritrean coastguard forces are active in this area, particularly around the Hanish Islands where the maritime borders of Yemen and Eritrea meet. These forces might not be immediately recognisable. There have been previous incidents involving private craft where Yemeni and Eritrean forces intercepted such craft which had not been immediately recognisable and were not following typical transit routes. Coastguard craft might shadow merchant vessels as part of their regular operations.

There have been no further Houthi drone attacks after oil facilities in southern Yemen were targeted in October and November 2022. Peace talks are ongoing between the factions in Yemen. While there has been no breakthrough, there is a high degree of optimism among the parties regarding a potential breakthrough. In this climate, it is unlikely that there will be a widespread resumption of Houthi attacks against maritime targets or oil facilities.

Due to recent tensions in the wider Middle East, the US has increased its naval deployments, including in the Red Sea. This has prompted a warning from Houthi command, cautioning US forces against entering Yemeni territorial waters. This is unlikely to take place but underscores that there is an ongoing conflict in Yemen – with wider implications – that remains unresolved.

The political and security situation in Sudan remains precarious with various ceasefires being announced but no permanent resolution between the warring parties. There are potential security implications for port calls, although the main area of Port Sudan is mostly secure, and the situation should be assessed ongoing. Fighting is unlikely to affect transits in the Red Sea.

Forecast

The likelihood of Houthi attacks on ports or shipping is still limited due to ongoing peace talks. The absence of attacks since November 2022 is indicative of the improving situation. For most vessels in transit, the threat level is low. Attacks against transiting vessels are currently not expected, particularly for ships that are using established transit corridors.

For transiting vessels, encounters with local traffic – that have armed crew on board – are likely to continue; such encounters are not a significant threat but can lead to cases of mistaken identity. Proximity to the Yemeni coast increases the possibility of such encounters. Pirate attacks are unlikely in this area.

Gulf of Oman – Persian Gulf

There were two incidents in this region in September, both seizures by Iranian forces of tankers suspected of smuggling refined oil products. Details of these seizures are often not made clear made by Iran, but these incidents are almost certainly related to Iran's enforcement of its waters to prevent maritime smuggling. This smuggling takes advantage of local price differentials and involved locally-trading vessels, often small tankers or other vessels.



Iranian patrol boats in the Persian Gulf (Source: Islamic Republic News Agency)

These operations by Iran are separate to other vessel seizure operations, such as Iran's ongoing dispute with the US over the seized crude oil cargo on the SUEZ RAJAN. Iran continues to detain the crude oil tanker ADVANTAGE SWEET, seized in April with a cargo bound for Houston. A US court found against the operator of the SUEZ RAJAN, the cargo of Iranian crude has now been forfeited, transferred to a new vessel and sent to Rotterdam. The US government will receive the proceeds of the sale. It is likely that there will be further operations by Iran linked to this dispute, or at least prolonged negotiations for the release of the ADVANTAGE SWEET. Vessels with US connections, through flag, ownership/management, or cargo, currently face a higher threat.

Seizing vessels has been a successful strategy for Iran as it is typically able to secure concessions in return for the vessel's release. Civilian agencies are also involved in the detentions and crew are typically well-treated. The release of seafarers is secured before that of the vessel, although the timing can vary. It is not unusual for vessels to be held for several months before a political compromise is reached and the vessels can be released as well.

Forecast

There are various permutations that might increase (or decrease) the threat to certain vessel profiles, such as port calls, cargo, flag, or ownership/management. The current threat remains higher for vessels linked to Israel, although there have been no incidents in last six months. Limited operations against vessels are a tactic that Iran can use in response to actions taken by Israel or other states in the region. Operations linked to Iran have included the use of limpet mines and drones/missiles to target vessels.

There is also a threat of potential vessel boardings and seizures as Iran has an extended record of such operations to resolve political and commercial disputes. The frequency of these incidents is difficult to predict but further cases are expected ongoing, particularly targeting US-linked vessels.

Somali Basin and wider Indian Ocean

Merchant ships in transit should expect encounters with local traffic, which might be fishermen, traders, or smugglers (or all three). Skiffs will often pass close to merchant ships and the crew are likely to be armed, even if they are not showing weapons to avoid attracting attention from armed guards that might provoke an incident.

There have been no confirmed pirate attacks since 2019 and piracy incidents are unlikely. Opportunistic approaches are possible, in an area out to around 300 nm from the Somali coast, but the overall threat continues to decline. Naval forces remain in the area, focusing on a range of maritime threats – including piracy and smuggling – which is an important deterrent to attacks on merchant ships. Somalia is continuing to develop its maritime policies to improve further the security situation in the Somali Basin.

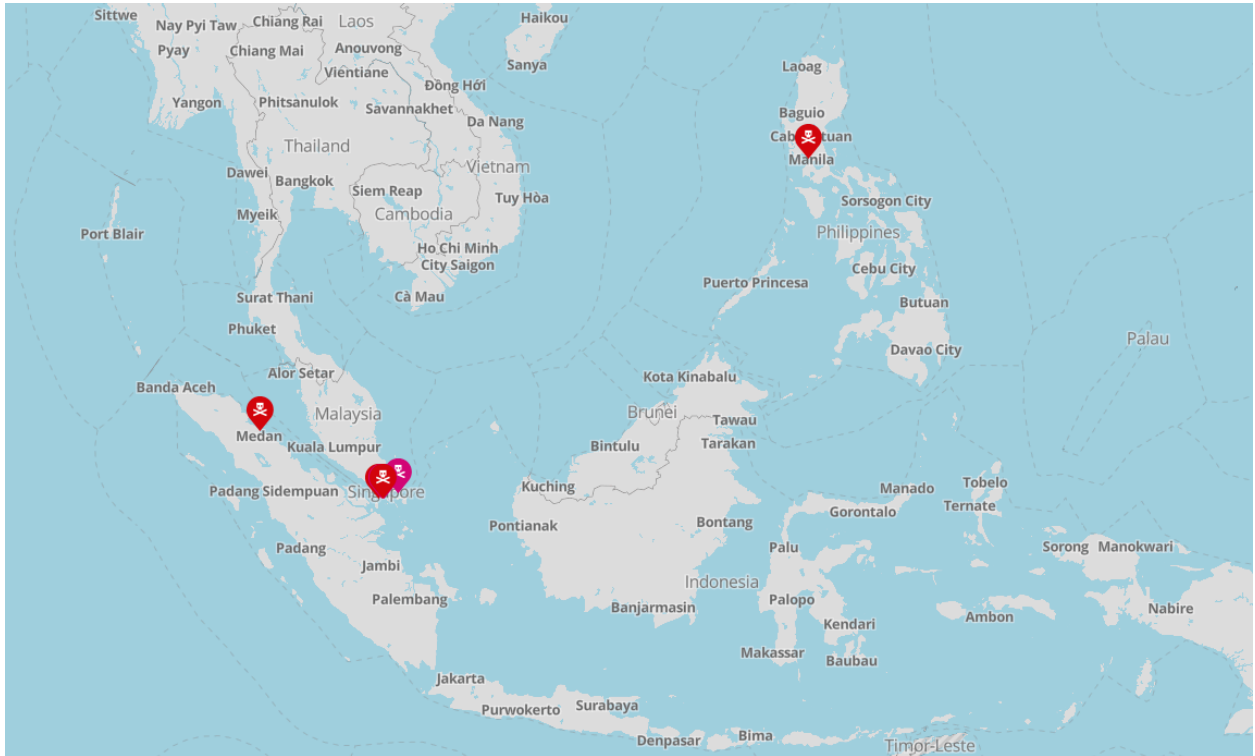
Forecast

Local craft of various kinds are very likely to be encountered in this area and are potentially difficult to identify in some cases. Most vessels in transit are unlikely to be affected. Pirate attacks are unlikely.

Proximity to the Somali coast can also lead to encounters with local militias or criminal operations but the threat level is low. Military operations continue in Somalia against militant/terrorist group al-Shabab. However, there is only a limited maritime dimension to this conflict which is not expected to affect merchant ships in transit.

South East Asia

Events included in this report occurred between 1 and 30 September 2023, shown on the map below (Source: Risk Intelligence System).



Incidents

1 September – Bulk carrier YANGZE 8 boarded

Armed robbery Singapore Strait TSS 01:35 LT (17:35 UTC on 31 August)

7 September – Barge AZAMARA 5 boarded

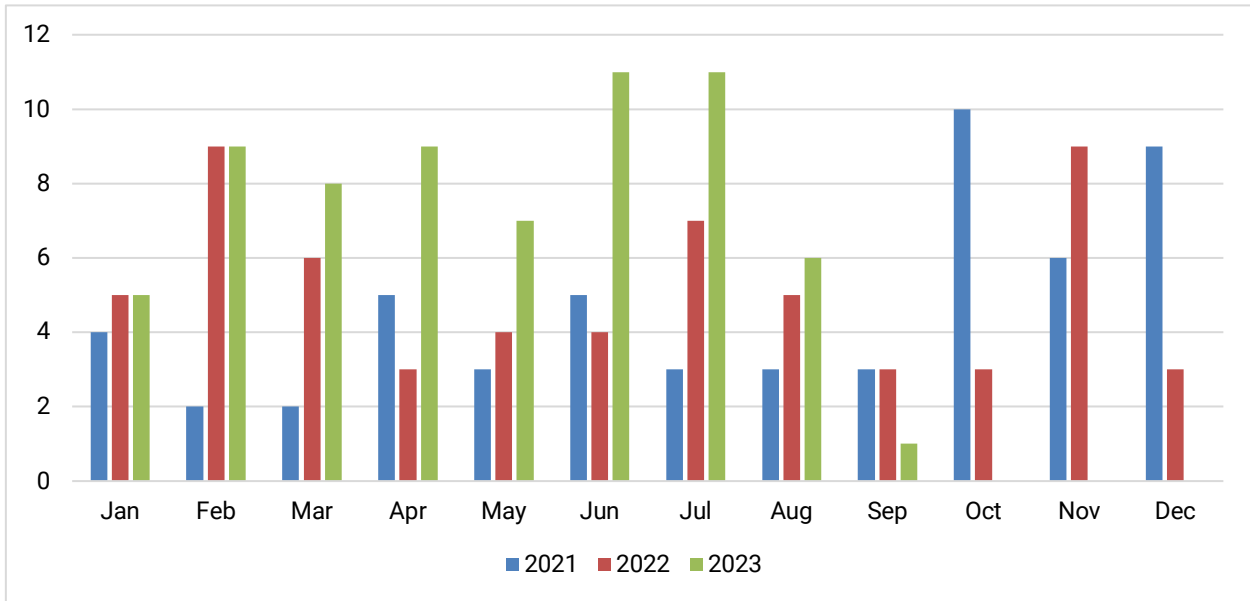
Theft Port of Cilicap Indonesia 16:00 LT (09:00 UTC)

Assessment

Singapore and Malacca Straits, South China Sea, Indonesian archipelago, Sulu / Celebes Seas

Thieves and armed robbers operating in the Singapore Strait remain the most significant threat for merchant vessels within these areas. Two incidents were recorded in South East Asia during September, including an armed robbery in the Singapore Strait. A notable decline of recorded incidents during September follows a trend seen since 2019 in which fewer incidents have been reported following August, followed by a return of such activity during the fourth quarter.

Over the past 12 months 69% percent of all reported incidents in the region have taken place in the Singapore Strait. Of these, 36% involved perpetrators that were reported as armed. It is likely that most perpetrators are actually carrying knives, even though these weapons may not be observed by crew during incidents. As the borders of Indonesia, Malaysia and Singapore intersect in the Singapore Strait, perpetrators appear to take advantage of jurisdictional challenges there, improving their ability to escape.



Number of maritime security incidents in the Straits of Malacca and Singapore per month in 2021, 2022 and 2023 to date (Source: Risk Intelligence System)

During the past twelve months there have been 82 incidents in the straits of Malacca and Singapore (SOMS). Of these, 73 occurred in the Singapore Strait and nine in the Malacca Strait. Of the total, 49 involved bulk carriers, 12 involved tankers, while 17 involved barges and other craft in tow. The outliers involved OSVs, a rig and a pipe-laying barge (attacked two times). No incidents in the straits have involved container ships or passenger vessels.

Overall, during this period 89% of all SOMS incidents targeted vessels underway, all but three in the Singapore Strait. The remaining incidents took place at the Batu Ampar, Belawan and Dumai anchorages and on the rig. During the past twelve months, 67% of the Singapore Strait incidents have taken place in the western part between Karimun and Batam. As coastal authorities have

increased patrols, response times are generally quick when incidents are reported. While most perpetrators are armed with knives or machetes, they will rarely attack the crew unless provoked.

For the wider region, incidents typically encountered are non-violent boardings at anchorages and while alongside, as illustrated by the boarding at Cilicap listed above.

A notable incident in 2022 was the hijacking of a bunker barge and the theft of its fuel cargo off Sulawesi. That incident, together with the unsolved theft of cargo from the OCEAN PRIDE in October 2021, illustrates that locally-trading tankers are vulnerable to hijackings, whilst larger tankers in international trade have not been targeted in recent years. These incidents, together with the illegal sale of fuel from a tug in the Johor Strait in March and regular law enforcement interventions in the region, further show that the black market trading of fuel at sea continues.

Armed robbers and thieves usually board vessels at night and target supplies and engine spares while avoiding crew. Areas with the highest frequency of criminal activity during the past twelve months include the Singapore Strait, the ports of Batangas, Belawan, Manila, Sandakan and Tanjung Priok. Boardings of vessels alongside are less frequent.

Aside from the Singapore Strait, boardings of vessels underway have also occurred in the Natuna Sea and the southern South China Sea, although at a lower frequency. Most incidents in the region involve bulk carriers and tankers, with very few involving container vessels. Boardings of oil rigs are infrequent and generally involve the theft of equipment and supplies.

Moreover, some incidents during the past 12 months illustrate that crew members may be injured during attacks. In addition to the most recent incident in June in which a seafarer suffered a head injury, in July 2022 perpetrators tied up and threatened a seafarer at gunpoint while stealing engine spares during an incident in the Singapore Strait. Crew alertness is an important deterrent.

The March 2023 hijacking of a tug during which palm seed batches were stolen from the barge in tow and a similar incident off Sulawesi in January are the only confirmed hijackings for cargo theft in the region since 2017. In 2018, there was one failed incident which had the markings of a product theft attempt involving the LEE BO off Mersing, Malaysia in the South China Sea.

The arrests of gang leaders behind hijackings had effectively suppressed such crimes, despite occasional incidents involving small tankers and barges which are locally owned, managed and trading solely in the region. As prices remain relatively high, it is possible that illegal fuel sales in the South China Sea, Sulu/Celebes Seas and the Singapore Strait will increase. This increases the vulnerability of smaller tankers to potential hijackings, similar to the period from 2011 to 2017.

As a result of intensified military operations in the southern Philippines and eastern Malaysia, kidnap for ransom activity of the Abu Sayyaf Group and its affiliates has been significantly suppressed. No cargo vessels have been targeted in the Sulu/Celebes Seas since February 2017. Tugs and fishing trawlers have also not been attacked since January 2020.

Forecast

In the coming month, the threat of boardings of vessels that are underway or anchored for the purposes of theft or armed robbery is moderate. Higher threat locations include the Singapore Strait and anchorages at Batangas, Belawan, Manila, Sandakan and Tanjung Priok. Lower threat levels are present in the southern South China Sea off the Malaysian peninsula, and the Natuna Sea off Pulau Mapur, Indonesia.

The threat of hijacking for product theft is moderate for locally trading small tankers. Hijackings in the region are infrequent due to effective law enforcement. The threat that internationally-trading tankers will be hijacked for cargo theft is assessed as low.

The threat of kidnappings of crew from merchant ships in the Sulu and Celebes Seas is low, particularly within the designated transit corridors. Fishing trawlers remain the most vulnerable craft with respect to ASG-related kidnapping operations, although other small craft, tugs, ferries and locally-trading vessels may also be vulnerable.

Definitions

Threat levels

The threat levels used in this report are as per the Risk Intelligence System and are assessed based on the likelihood and consequence of a particular threat type occurring. The threat levels are as follows:

- Low: Negligible impact on operations in the coming month due to the unlikely occurrence of threat-related activity.
- Moderate: Some potential for minimal impact on operations in the coming month due to occurrence of low- level threat-related activity.
- Elevated: Moderate impact on operations in the coming month is possible with some threat-related activity expected to occur.
- High: Potential for major impact on operations in the coming month due to the occurrence of significant threat- related activity.
- Severe: Potential for severe impact on operations in the coming month as significant threat-related activity is ongoing or expected to occur.

Incident types

The report covers the threats of piracy and armed robbery at sea in various forms but does not include other threats to merchant vessel operations such as stowaways or smuggling. All possible contingencies cannot be covered by any assessment and this report only includes an assessment of the threat for merchant vessels in general and not specific vessel types.

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