



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: Current situation in the Red Sea / Gulf of Aden

Background

Shipping traffic in the Red Sea and the Gulf of Aden has markedly declined since Houthi forces started to attack commercial ships. The seizure of the GALAXY LEADER on 19 November 2023 was the beginning of the ongoing Houthi campaign, although it is noteworthy that maritime traffic only started to decrease in mid-December (see Figure 1).

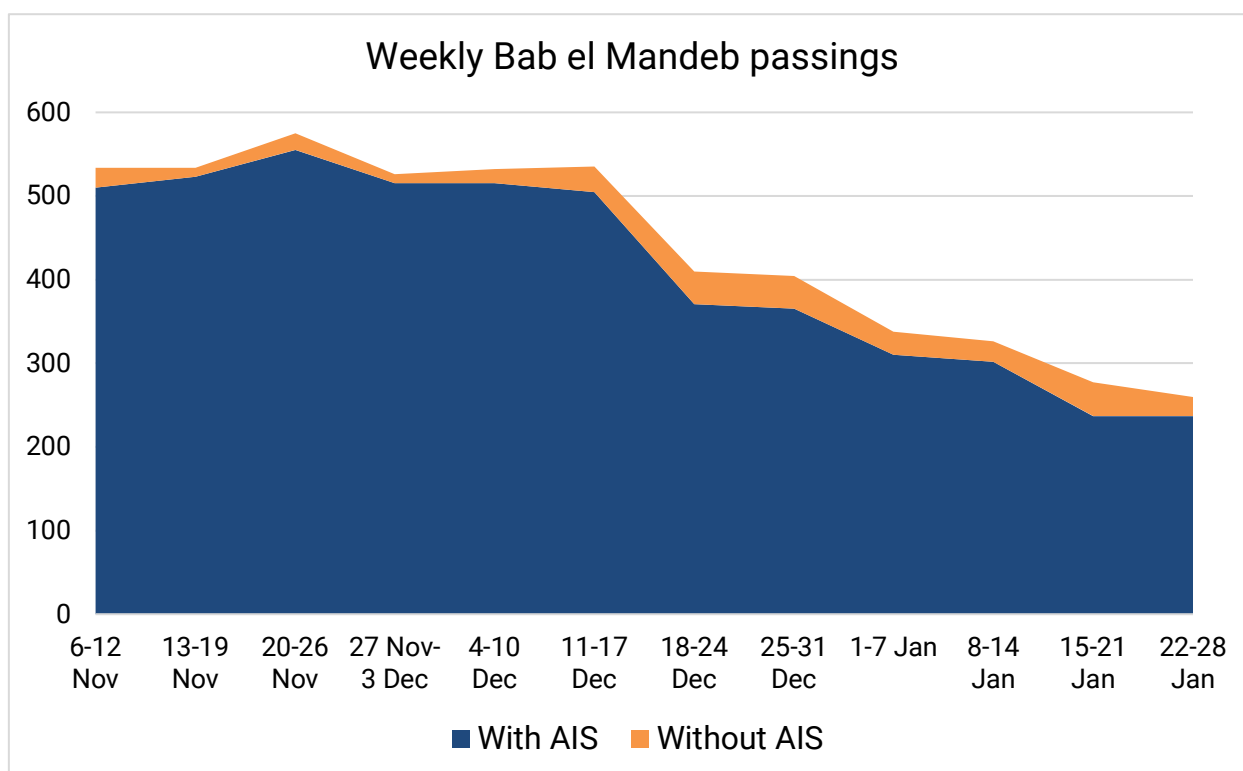


Figure 1: Number of merchant ships above 10,000 dwt passing the Bab el Mandeb per week between 6 November 2023 and 28 January 2024 (Source: Lloyd's List Intelligence / Seasearcher; data analysis by Bridget Diakun)

The fact that the number of ships passing the Bab el Mandeb has decreased by about 50% between November and late January is no surprise, considering various widely reported announcements from ship owners and operators. An interesting aspect, however, is the percentage of ships passing the Bab el Mandeb without broadcasting an AIS signal. While that number has increased slightly in recent weeks, only around 10% of Bab el Mandeb passings by merchant ships in international trade are 'dark' transits.

Switching off the AIS signal has been recommended by naval forces, yet there is currently no evidence to support that this is an effective mitigation measure. Several ships have been struck with the AIS off, suggesting that the Houthis have other means of identifying and tracking their targets.

Splitting up shipping traffic by different types of merchant ships highlights some other notable differences (see Figure 2).

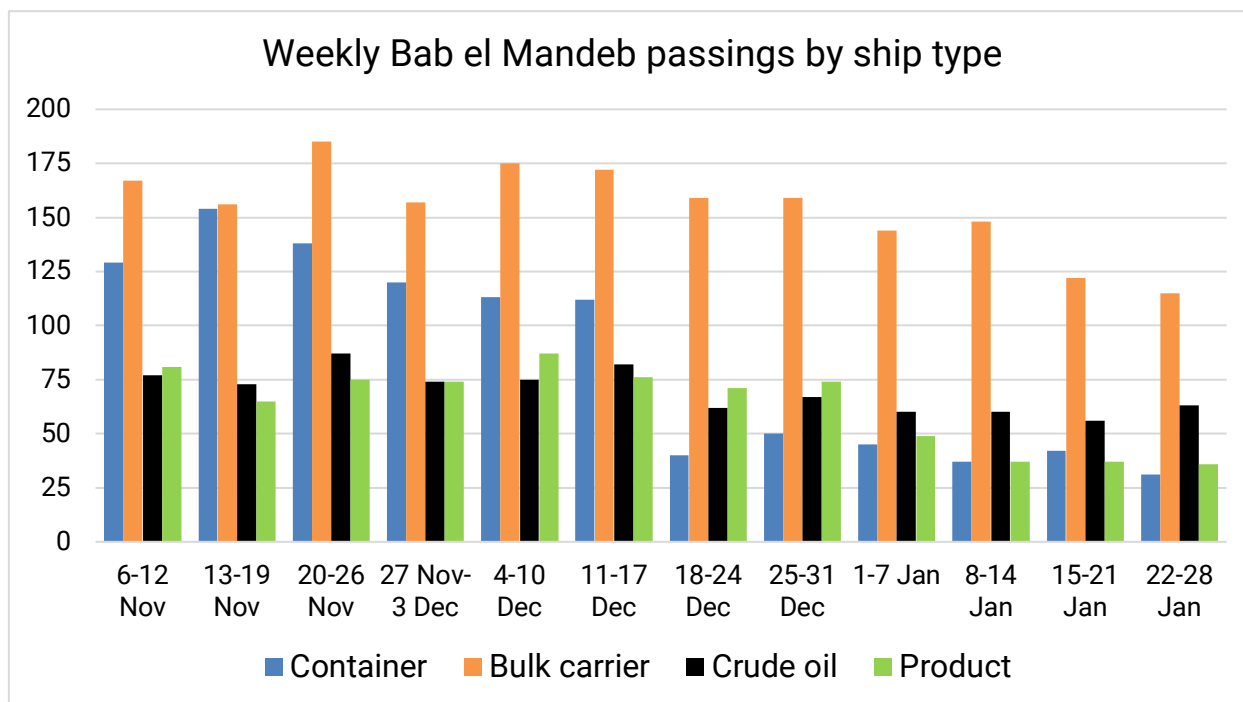


Figure 2: Number of different types of merchant ships above 10,000 dwt passing the Bab el Mandeb per week between 6 November 2023 and 28 January 2024 (Source: Lloyd's List Intelligence / Seasearcher; data analysis by Bridget Diakun)

Container lines generally decided in mid-December to re-route their ships on routes between Europe and Asia. Virtually all container ships that are still passing the Bab el Mandeb are relatively small vessels which are engaged in feeder services across the region.

For other segments of the shipping industry, the drop in traffic has been a lot more gradual. Crude oil tankers have only been affected to a relatively small degree so far. For product tankers and bulk carriers, a significant drop in traffic has only been notable since early January and is unlikely to continue much further, unless the Houthis expand their targeting criteria even further in the coming weeks.

Switching off AIS as mitigation?

As mentioned above, the number of vessels transiting the southern Red Sea and the Gulf of Aden without broadcasting an AIS signal has not increased considerably in recent weeks. It is at least highly questionable whether it is a useful mitigation measure to simply switch off the AIS signal and accept the resulting trade-offs, ranging from increased collision risks to potential commercial implications.

The attack against the MARLIN LUANDA which caused a fire that could only be extinguished after several hours occurred while the ship was steaming eastbound through the Gulf of Aden with the AIS signal on. It was only switched off after the vessel had been struck.



Fire onboard the MARLIN LUANDA after the vessel was struck in the Gulf of Aden (Photo: French Navy)

In contrast, the attack against the bulk carrier GENCO PICARDY highlights that Houthi forces have the capability to successfully attack ships without tracking them on AIS.

The ship had been southbound in the Red Sea when it suddenly turned around east of Jizan in Saudi Arabia during the evening on 14 January. It then steamed at regular speed throughout the night on a north-westerly course before starting to drift during the morning on 15 January. The AIS signal was switched off during the early afternoon and the ship then proceeded through the Bab el Mandeb before being struck by a drone after nightfall in the Gulf of Aden.

Houthi capabilities and support from Iran

The Houthis have their own intelligence, surveillance and reconnaissance capabilities which involve commercial and military-grade drones as well as local traffic, which can easily navigate in the area and track targets. Moreover, they have exploited long-standing links among the regional Yemeni diaspora to acquire information without foreign support, including from Iran.

Iranian support for Houthi forces in Yemen has been widely discussed in recent weeks. The BEHSHAD in particular has been identified in this regard. This converted general cargo vessel, often described as a 'spy ship', has been located in the southern Red Sea since 2021. It replaced the SAVIZ, a similar ship which had been damaged in a limpet mine attack that was believed to have been carried out by Israeli forces.

In recent weeks, the BEHSHAD moved to a position off Djibouti. It is likely that the ship is still used for targeting and surveillance in support of Houthi forces. During most recent movements,

the BEHSHAD has largely remained at low speeds (2-3 knots), indicating either continued operation of surveillance equipment, or some level of damage from an unknown attack.

The BEHSHAD itself is not assessed to pose an acute threat to vessels close by as it is effectively a floating support base with intelligence collection capabilities. This is a significant difference from another vessel, the SHAHID MAHDAVI, a former container ship that has been converted into a drone carrier. It entered into service in early 2023 but at this stage it is unlikely to be deployed in the Red Sea or the Gulf of Aden.

It should also be noted that the effective range of Houthi missiles and drones expands into the Gulf of Aden, underlined by several recent attacks – including successful strikes – against US-owned merchant ships. In addition, identification of potential targets is possible in this area through various means, meaning that the threat level for attacks is the same as for the southern part of the Red Sea.

Houthi claims as to their missile ranges are often misleading. Roughly speaking, the ranges are estimated to vary from 80 to 800 kilometres, which places most of the Gulf of Aden well within their reach. While there are significant doubts regarding the Houthis' ability to precisely direct missiles up to that range, it is at least possible that ships will be attacked at a significant distance from Houthi-controlled areas in Yemen.

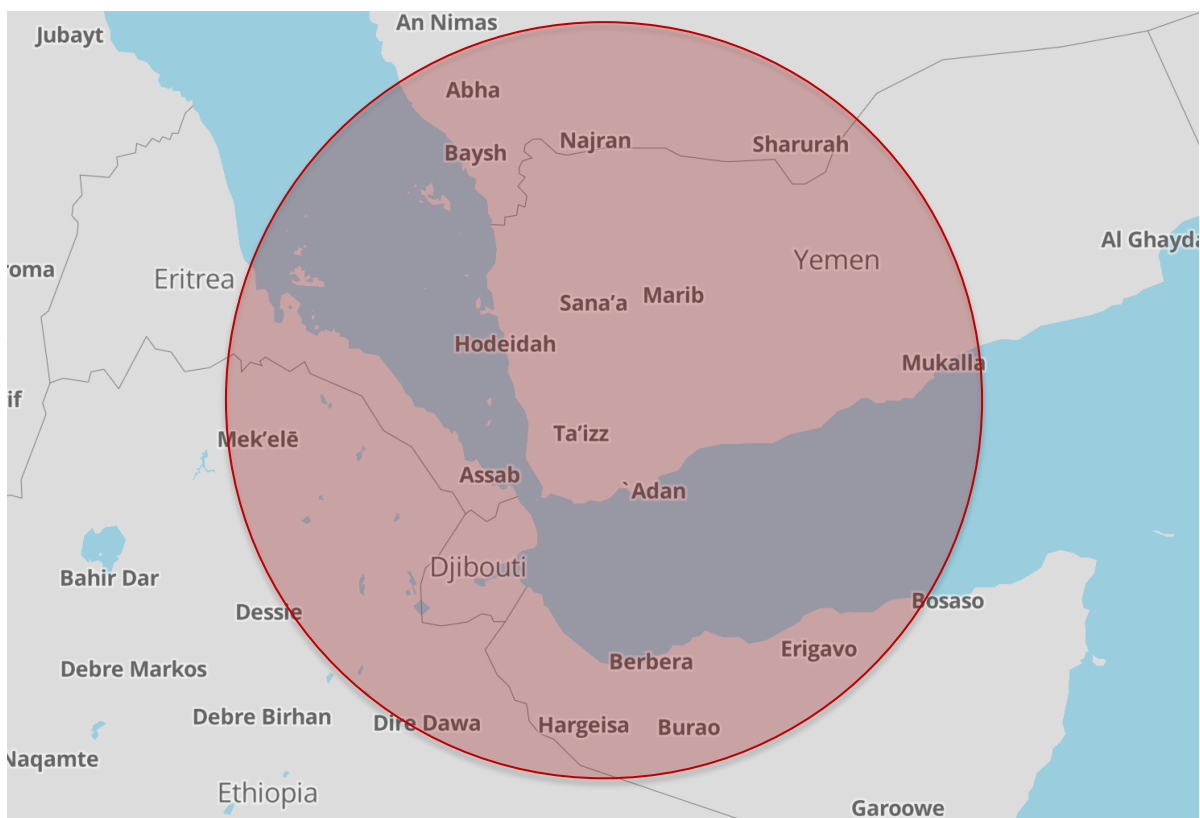


Illustration of effective Houthi targeting capabilities based on known and suspected missile and drone stocks (Graphic: Risk Intelligence)

Outlook

Ongoing military strikes against Houthi forces in Yemen, conducted by US and UK military forces and directly supported by four other countries are unlikely to be effective deterrents against future Houthi attacks on commercial shipping.

While it is likely that the Houthis' ability to launch missiles can be degraded over time, it will be impossible to assess whether this threat has been completely eradicated. Moreover, Houthi forces would still maintain the capability to launch drone attacks which require even less land-based equipment. Beyond their already significant drone stocks, Houthi forces have shown that drones can be produced domestically, virtually exclusively based on commercial components.

It is therefore likely that the Houthis will continue their campaign in the coming weeks, although there are now few potential targets that meet the stated Houthi criteria. Since the seizure of the GALAXY LEADER in November, Houthi attacks have been specifically targeted and not indiscriminate, although some were likely based on misidentification due to outdated information in publicly available databases. It is very unlikely that the Houthis will engage in indiscriminate attacks, potentially targeting all merchant ships transiting the Red Sea and the Gulf of Aden.

Decreasing the threat level for commercial operations requires a different solution beyond a purely military response. It is vital to note that major Arab powers like Saudi Arabia and Egypt are reluctant to be involved in any actions that could be interpreted as helping Israel. By and large, the Houthis' actions are supported by large parts of the population in Arab countries. As a result, governments are wary of sparking protest movements by supporting US-led military operations against the Houthis.

While the Houthi claim of attacking commercial ships in support of Palestinians in Gaza is not their main motivation, it has helped them to gain a significant degree of regional influence. As such, there are many political and propaganda reasons for the Houthis to continue their attacks. Any sustainable solution would therefore have to offer an off-ramp to the Houthis, allowing them to claim some form of – perceived – victory.

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

Local weather conditions continue to impact operations, both military and maritime. As the war in Ukraine moves into its third year, forces on both sides continue to focus on gaining an advantage and hold any hard-won ground. At the same time, the war continues to influence the general security environment, with ongoing targeting of Ukrainian civilian infrastructure by Russian forces across the country.

Although the number of maritime-related incidents has remained at a lower level compared with recent months, Russian forces continue to shell Ukrainian infrastructure including in Ukrainian Black Sea and Danube regions. In addition, there remains ongoing uncertainty regarding drifting mines. The Mine Countermeasures Naval Group in the Black Sea (MCM Black Sea) involving Bulgaria, Romania and Turkey was announced in a memorandum of understanding signalling the intention to clear sea mines. The document was signed on 11 January.

Any operational impact on individual ports as a result of military operations, will vary and remains difficult to determine as they will depend on individual circumstances. Some port operations are known to have been affected due to damage caused by attacks either directly against port facilities or indirectly as part of power cuts or similar. Some incidents have also directly involved merchant ships, though it is not assessed that the respective vessels were the intended targets.



Fire at the Tuapse oil refinery in Russia following an attack on 25 January (Photo: Social media)

Recent incidents due to military operations, include infrastructure damage in Odessa and damage to the Tuapse oil refinery in Russia. Fighting continues throughout Ukraine and any claimed outcome, by forces on both sides, remains uncertain. Fighting remains concentrated mainly in southern and eastern parts of Ukraine. Local winter weather will continue to influence the overall threat picture, which is very likely to remain volatile.

Black Sea

Weather conditions continue to impact operational manoeuvres, both commercial and military. Nevertheless, both the Ukrainian and Russian military continued to launch operations, although Ukraine has seen greater success and impact following the targeting of Russian port infrastructure. Similar attacks are assessed as likely to continue to occur.

The reported mine incident on 27 December involving a bulk carrier near the Sulina canal in the Black Sea underlined that the threat from mines remains a serious issue for merchant ships during voyages to and from Ukrainian ports. The tri-party MCM Black Sea – which was officially agreed in January as mentioned above – is therefore a positive development. However, various mine-clearance activities were understood to have been undertaken already and the new memorandum of understanding largely formalizes cooperation between the three countries.

Following December reports that Russia had no interest in returning to the UN-backed Black Sea Grain Initiative, explorative talks are ongoing in relation to a possible future incarnation of initiative. The Ukrainian ‘humanitarian corridor’, which initially was announced for the evacuation of vessels from the ports of Odessa, Chornomorsk and Pivdenny, is ongoing with a recent report of 18 million tons of cargo shipped, of which nearly 13 million were agricultural products.

It is a Ukrainian success but the insurance arrangement between Ukrainian banks and UK-based marine insurers is also noteworthy. Local winter weather conditions have raised fears of the possible impact from mines as the weather may disperse them over a greater area.

With an increase in the number of vessels using the ‘humanitarian corridor’, the threat of Russia to attempt to disrupt this trade by various means remains significant, including increasing the intensity of attacks on Ukrainian ports. Although it would be a significant escalation, both sides could still act on earlier warnings towards commercial vessels going to Russian and Ukrainian ports respectively as legitimate military targets. However, this is very likely dependent on specific and individual circumstances as well as military developments on land.

The ongoing Russian focus of targeting Ukrainian port infrastructure is likely to continue which results in a heightened likelihood of collateral damage for vessels at berth – as previous incidents have proven – or direct missile hits, though likely unintended. The north-western part of the Black Sea near the Ukrainian and Crimean coasts, including the Sea of Azov and the Kerch Strait, is still assessed as prohibited area of navigation by the Russian Navy.

Vessels transiting the Kerch Strait and Sea of Azov are assumed to have Russian permission. The operational status of Berdyansk and Mariupol remains disputed. Russian officials claim both ports are open and operating. Ukrainian authorities have previously stated that they would remain closed until again under Ukrainian control.

Port operations

Ukrainian Black Sea ports, which are not part of the ‘humanitarian corridor’, are still understood to be closed to normal operations. However, the ports of Odessa, Chornomorsk and Yuzhny all

handle vessels which have used the 'humanitarian corridor'. This is likely to continue but will be influenced by the overall security situation and political and diplomatic developments.

Ukrainian Danube ports are operating. However, delays and operational disruptions have occurred and continued in January, often due to weather conditions. Drifting mines, pilot shortages and disruptions due to Russian attacks remain likely. Future delays and disruptions cannot be ruled out.

Summary

The war in Ukraine remains unlikely to conclude in the foreseeable future. Attacks against civilian, including maritime, infrastructure are therefore likely to continue – possibly for the duration of 2024. It remains unclear to what degree Russia or Ukraine would enforce their threats against vessels transiting to each other's Black Sea ports as potential military targets. However, any such incidents are assessed as most likely to be individual rather than a blanket approach. Collateral damage is still assessed as the most likely threat for merchant ships.

Any diplomatic breakthroughs, ceasefire agreements or any return to the previous regional security situation in the Black Sea continue to be assessed as unlikely and the volatile nature of the war means that the security situation can change at short notice. Major successful offensive operations by both Ukrainian and Russian forces remain unlikely – in the near term. However, any such change in circumstances would likely have a wider impact on the general security situation, including the maritime environment.

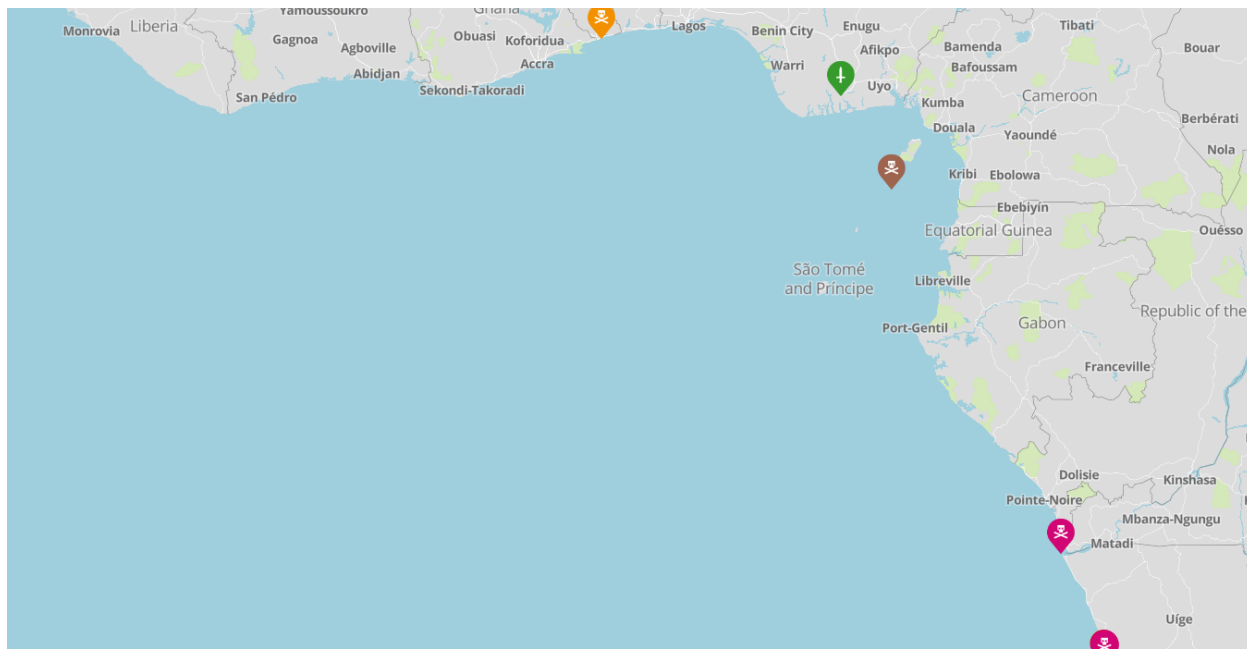
Merchant ship operations should take the possibility of collateral damage into account. The impact of future Ukrainian and Russian operations should be monitored closely. Risk Intelligence strongly recommends conducting thorough threat and risk assessments prior to any transit and to update contingency 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 31 January 2024, shown on the map below (Source: Risk Intelligence System).



Incidents

1 January – Product tanker HANA I boarded

Kidnap/ransom, 45 nm south of Bioko Island (Equatorial Guinea), 20:45 LT (19:45 UTC)

3 January – Offshore supply vessel BOURBON EXPLORER 519 boarded

Theft, Luanda anchorage (Angola), 01:00 LT (00:00 UTC)

8 January – Product tanker RATHBONE boarded

Armed robbery, Luanda anchorage (Angola), 00:30 LT (23:30 UTC on 7 January)

9 January – Crude oil tanker boarded

Theft, Luanda anchorage (Angola), 03:35 LT (02:35 UTC)

14/15 January – Offshore supply vessel BOURBON TOPAZ boarded

Theft, Soyo anchorage (Angola), Nighttime

22 January – Suspected pirates arrested, one killed

Military operation, Rivers state (Nigeria)

24 January – Container ship MAERSK CALABAR reports boarding attempt

Failed theft, Lome anchorage (Togo), 23:40 LT/UTC

25 January – Offshore supply vessel AURORA DIAMOND boarded

Theft, Luanda anchorage (Angola), 01:30 LT (00:30 UTC)

Assessment

Nigeria / Niger Delta

Attackers operating off the southern and eastern Niger Delta remain the most significant potential threat in the Gulf of Guinea. While few security incidents involving merchant ships have been reported in 2023, the threat level was underlined by several high-profile incidents in the first half of the year as well as the kidnapping of nine crew members from the product tanker HANA I on 1 January.



The product tanker HANA I which was attacked south of Bioko Island on 1 January with nine crew kidnapped (Photo: MarineTraffic / Mike Grieve)

While the incident took place in Equatorial Guinea's EEZ, the hostages were later released in the Niger Delta, indicating that the attack was carried out by a Nigerian group. The tanker, however, is suspected to have been involved in illicit operations, meaning that it is at least possible that the ship was not a random target for the perpetrators.

Attacks against local vessels in or near the Niger Delta are also frequent, further highlighting the fragile security situation.

Crude oil theft and sales of illegally refined petroleum products have remained a significant concern throughout 2023. Such operations have long provided constant revenues to organised criminal groups yet profit margins began to skyrocket in early 2021. Nigerian crude oil production and export levels remain significantly below the quota set by OPEC as well as below the level projected in the federal budget. Any shortfalls will likely have to be financed by additional debt.

While Nigeria's government has tried to improve the security situation, an ongoing political crisis in Rivers state threatens to derail these efforts. Port Harcourt, the state's capital, is considered to be Nigeria's 'oil capital'. Lingering tensions in the state have led to fears over ethnic clashes which could spread to other Niger Delta states.

The overall situation in the Niger Delta is closely linked to oil and gas revenues which are crucial for budgets on all levels of government. Various short-term measures have been implemented by

President Bola Tinubu since his inauguration in May to boost crude oil production which would provide a boost to his ambitious infrastructure plans. Most importantly, however, the new government has continued to "pay off" criminal or militant groups in the Niger Delta through security contracts.

Similar efforts in the past have not been successful in the longer term as underlying challenges have not been tackled. Maritime operators should therefore monitor developments in the Niger Delta as an uptick in attacks against merchant ships at sea is possible on short notice.

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 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 carefully analyse all security-related incidents. Many cases which are simply reported as piracy involve vessels which are solely trading within the region. Such incidents are unlikely to be genuine pirate attacks aimed at 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.

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 April. 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)

There were several maritime security incidents reported in January, notably four cases at the Luanda anchorage in Angola. Two other incidents were reported at the Soyo anchorage in Angola and the Lome anchorage in Togo respectively.

In one of the incidents off Luanda, the perpetrators subdued a crew member. Even in this case, however, they escaped when they were discovered by the other crew and no injuries to any seafarer were reported. In all other incidents, the perpetrators also escaped upon discovery by the crew.

Overall, the number of maritime security incidents in 2023 has been low compared with previous years. While the number of incidents in January was an outlier, it is noteworthy that all cases were low-profile incidents which did not result in any confrontations with the perpetrators.

While the situation has improved significantly in recent years, 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 general threat level. Criminal activities at sea remain closely linked. Illegal fishing, smuggling as well as other illicit operations have remained stable or 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.

Across countries in West and Central Africa, 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 31 January 2024, shown on the map below (Source: Risk Intelligence System).



Incidents

A complete list of incidents related to Houthi attacks in the Red Sea and the Gulf of Aden can be found on the Risk Intelligence System as well as in Risk Intelligence's "Security Threat Update: Red Sea/Gulf of Aden" which is issued on a weekly basis.

5 January – Bulk carrier LILA NORFOLK boarded

Hijacking, Somali Basin, 17:19 LT (14:19 UTC)

11 January – Crude oil tanker ST NIKOLAS boarded

Naval operation, Gulf of Oman, 07:30 LT (03:30 UTC)

12 January – Fishing vessels hijacked

Hijacking, Off Mareeyo (Somalia), Nighttime

27 January – Bulk carrier WAIMEA reports attack

Failed attack, Indian Ocean, 13:05 LT (08:05 UTC)

27 January – Fishing vessel LORENZO PUTHA 4 hijacked

Hijacking, Indian Ocean, 07:30 LT (03:30 UTC)

28 January – Merchant vessel seized for fuel smuggling

Naval operation, Persian Gulf

29 January – Indian navy frees hijacked dhow

Naval operation, Gulf of Aden

Assessment

Southern Red Sea – Gulf of Aden

This area covers shipping routes which are affected by the conflict and political dynamics in Yemen, including operations by Houthi forces to target shipping linked to Israel as well as the US and the UK. Overall, the threat level to vessels directly owned by Israeli companies had been severe since the beginning of the Houthi campaign. Such vessels therefore largely stopped transiting the Red Sea. Houthi forces have expanded their potential targets and have justified them in some cases with only remote links to Israel.



Damage on the bulk carrier ZOGRAFIA which was struck by a missile in the southern Red Sea on 16 January (Photo: Social media)

Attacks on merchant vessels continued in January, including highly visible incidents such as video footage showing a significant explosion on the bulk carrier ZOGRAFIA which was struck by a missile in the Red Sea. Adding in naval activities, suspicious approaches and military strikes against Houthi targets, there were 34 separate incidents in the southern Red Sea in January, highlighting the significant level of activity.

Of note for January when compared to December, there was a cluster of attacks in the Gulf of Aden including the product tankers MARLIN LUANDA and CHEM RANGER and the bulk carriers

GENCO PICARDY and GIBRALTAR EAGLE. All were targeted by missiles or drones, showing the range at which Houthi forces are able to operate.

The US-flagged container ship MAERSK DETROIT was attacked while northbound approaching the Bab el Mandeb. The USS GRAVELY responded and a statement issued by the US military indicated that three anti-ship ballistic missiles from Houthi-controlled areas of Yemen were fired towards the ship. One missile impacted in the sea close to the container vessel, the two other missiles were intercepted.

Military action by the US and the UK with strikes against targets in Houthi-controlled areas of Yemen has led to another expansion of the Houthis' target pool, underlined by widely publicised threats. This has resulted in a severe threat level for vessels directly linked to the US and UK as well as the four other countries directly supporting military strikes under Operation Poseidon Archer. Several attempted and successful attacks in recent weeks have underlined the threat level and shown that Houthi forces retain the capability to strike merchant ships.

Several suspicious approaches have been reported throughout January in western areas of the southern Red Sea. These generally involved small craft that were likely part of the Eritrean coastguard. These forces are active in the area, particularly due to boundary disputes with Yemen. Merchant vessels diverting to areas close to Eritrean territorial waters are likely to encounter coastguard vessels that might be mistaken for threatening, even if they are engaged in regular constabulary tasks.

Forecast

There has been an increased naval presence in the area, which is having some impact, but ongoing attacks show the challenge of providing area defence to all merchant ships. Attacks in the Gulf of Aden, as seen in January, show that the area affected by the Houthi campaign has expanded and affects the southern Red Sea and the Gulf of Aden.

It is difficult to forecast the duration of current Houthi operations, which are intended to put economic pressure on Israel. It is also symbolic for the Houthi government as part of its public campaign against Israeli military operations in Gaza. If there is a breakthrough in this conflict, the Houthis might conclude that they 'have done enough' and scale back operations. For now, however, additional attacks should be expected.

To date, the Houthis have not incurred significant costs, particularly in their normalisation talks with Saudi Arabia, to deter them from continuing. Military action has likely degraded some capabilities of the Houthis, but they retain numerous drones that can be used to attack vessels and these are easier to deploy and to launch undetected than more traditional platforms such as anti-ship missiles.

Gulf of Oman – Persian Gulf

Of the three sub-areas of the Western Indian Ocean, the Gulf of Oman and the Persian Gulf recorded the fewest incidents. Iran has reinvigorated its campaign against Israeli shipping interests after the start of the war in Gaza. There have been no additional attacks since the Liberia-flagged product tanker CHEM PLUTO was attacked by at least one drone while underway in the Arabian Sea around 200 nautical miles off India on 23 December.

Although Iran has land-based options through its proxy forces for putting pressure on Israel, it is likely that Iran wants to demonstrate ongoing intentions and capabilities in carrying out maritime attacks. The threat to vessels directly linked to Israel is therefore high throughout this area, even though the volume of attacks is much lower than in the Red Sea.



The tanker SUEZ RAJAN, now ST NIKOLAS (Photo: Vesselfinder)

There was also a suspicious approach reported. The exact nature of the small craft involved has not been confirmed. Local traffic is the most likely explanation as there is plenty of legal and illegal traffic in this area, as well as small patrol craft from Iran. There is currently an understandable level of heightened vigilance by crew and armed guards on merchant vessels, and local craft can be hard to accurately identify.

Iranian forces boarded and seized the Marshall Islands-flagged ST NIKOLAS in the Gulf of Oman on 11 January. This case is directly related to Iran's oil exports to China. The ST NIKOLAS was previously the SUEZ RAJAN, which the US seized in Asia before forcing the owners to take the vessel to the US where the cargo was forfeited. It is likely that Iran is seeking some compensation for its lost oil cargo and might also be seeking to punish the owners.

Related to this situation, Iran continues to detain the crude oil tanker ADVANTAGE SWEET, seized in April with a cargo bound for Houston. 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 ship. Vessels with US connections – through flag, ownership/management or cargo – currently face a higher threat level compared with other ships.

Seizing vessels has been a successful strategy for Iran as it is typically able to secure concessions in return for the vessel's release. It is not unusual for ships to be held for months

before a political compromise is reached. Iran also has ongoing operations against fuel smuggling, as seen by an incident this month, unrelated to political disputes over oil trading.

Forecast

There has been a heightened threat to merchant vessels in the Gulf of Oman and Persian Gulf for some time, due to Iran's selective targeting of certain vessels to make broader political statements. Iran is balancing two priorities: the need to show leadership in 'resistance' to Israeli military operations in Gaza and the need to avoid an escalation in the conflict with Israel.

Low-level operations – such as some degree of assistance to the current Houthi maritime campaign – help to show this leadership. Direct attacks on a limited scale, such as in November and December, likely serve to demonstrate ongoing capabilities and intentions without crossing escalation thresholds.

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, particularly targeting US-linked vessels or vessels related to Iran's oil trading under sanctions.

Somali Basin and wider Indian Ocean

Pirate activity in the Indian Ocean continued in January after the 'surge' in December. Operations took place at significant distances from the coast, more than 500 nautical miles from Somalia. The primary targets continue to be fishing vessels, but there were also two incidents targeting merchant vessels in apparent attempts to replicate the hijacking of the bulk carrier RUEN.

At the time of writing, there was no updated information on the RUEN. The vessel remains under control of the hijackers and is being held off the Somali coast between Bandarbeyla and Eyl, monitored by naval forces and Somali authorities.

The Liberia-flagged bulk carrier LILA NORFOLK was boarded on 4 January. UKMTO initially reported that five to six armed men had boarded the vessel. All 21 crew members were able to assemble in the citadel. The Indian navy then dispatched INS CHENNAI to assist while an Indian maritime patrol aircraft overflew the ship during the early morning (local time) on 5 January and established contact with the crew. Several hours later, the vessel was boarded by naval personnel, all crew were reported as safe. The perpetrators had escaped earlier.

The Liberia-flagged bulk carrier WAIMEA reported an attack in the Arabian Sea on 27 January. The ship was reportedly approached by a skiff with four to five armed men. The skiff came to around 300 metres and fired upon the vessel underway. The on-board armed security team returned fire, resulting in the skiff moving away.

Other incidents involved fishing vessels, including a Sri Lankan vessel around 600 nautical miles offshore that was boarded but subsequently rescued by the Seychelles coastguard. The Indian Navy also followed the reported hijacking of an Iranian dhow just off Puntland on 29 January where a boarding by naval forces was able to secure the ship. Overall, naval forces have so far been effective in disrupting pirate operations. However, other incidents this month targeting fishing vessels close to the coast underscore the focus on fishing activities.



Iranian dhow which was hijacked off Somalia and later freed during a naval operation (Photo: Indian Navy)

Recent incidents are a reminder that the capabilities of Somali ‘pirates’ have not diminished. Large-scale pirate structures in Somalia have been mostly demolished, a widespread return to piracy is therefore unlikely. However, as noted above, opportunistic hijackings can still take place and merchant ships may be targeted.

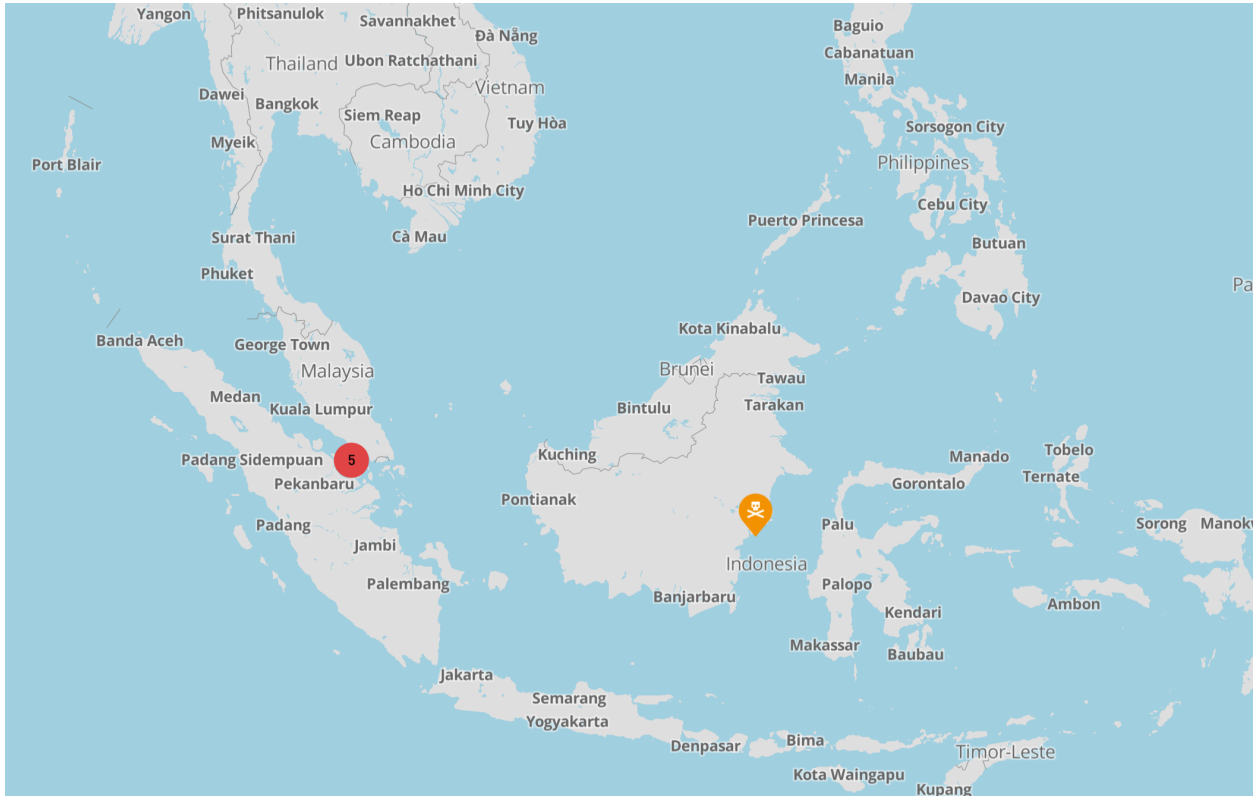
Forecast

Unless there is a resolution to the fishing disputes in Somalia, the hijacking of fishing vessels is likely to continue – but only with a limited impact on merchant ships. It is currently unclear if there is a revival of the pirate threat to vessels in transit. Some level of opportunistic boardings remains possible in this area, even beyond 500 nautical miles from the coast. This threat is still emerging and must be closely monitored.

Proximity to the Somali coast can also lead to encounters with local militias or criminal operations although the threat level is low. Military operations continue in Somalia against the militant Islamist 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 31 January 2024, shown on the map below (Source: Risk Intelligence System).



Incidents

4 January – Bulk carrier HELGA OLDENDORFF boarded

Failed theft, Balikpapan anchorage (Indonesia), 00:50 LT (16:50 UTC on 3 January)

4 January – Bulk carrier CRIMSON QUEEN boarded

Armed robbery, Singapore Strait TSS, 02:40 LT (18:40 UTC on 3 January)

4 January – General cargo vessel boarded

Armed robbery, Dumai anchorage (Indonesia), 03:00 LT (20:00 UTC on 3 January)

4 January – Bulk carrier ARTIN boarded

Armed robbery, Singapore Strait TSS, 03:15 LT (19:15 UTC on 3 January)

10 January – Bulk carrier CMB CHIKAKO boarded

Armed robbery, Singapore Strait TSS, 02:40 LT (18:40 UTC on 9 January)

13 January – Product tanker SOLAR ROMA boarded

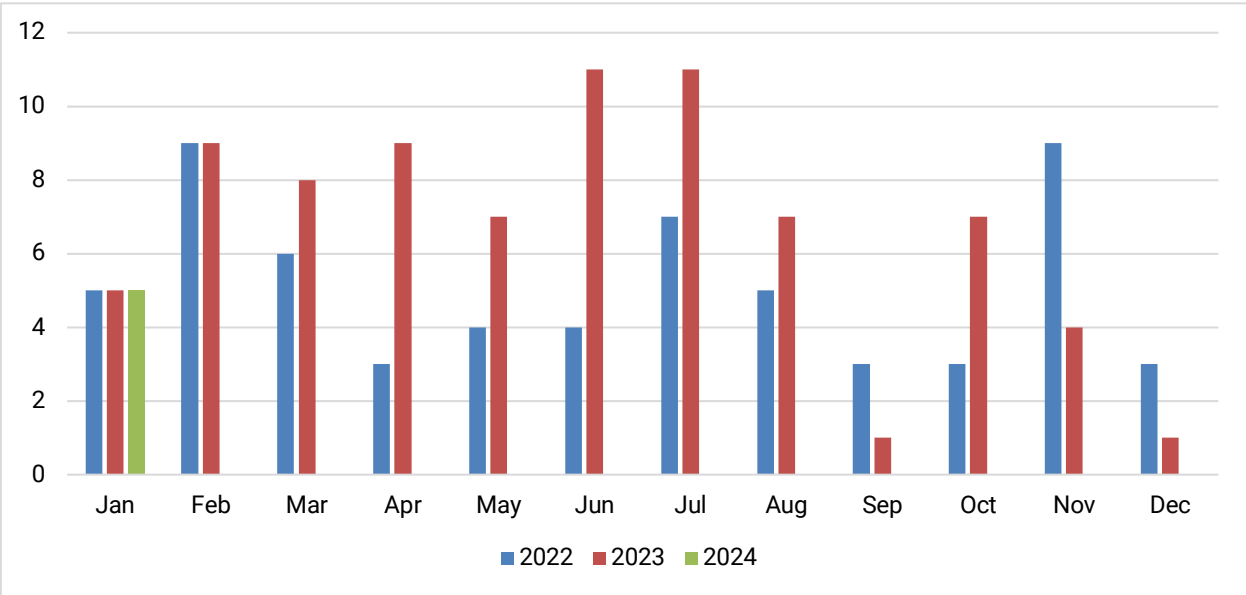
Failed theft, Dumai anchorage (Indonesia), 01:30 LT (18:30 UTC on 12 January)

Assessment

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

Statistically, thieves and armed robbers operating along the Singapore Strait remain the most significant threat for merchant vessels. Unfavourable weather conditions during December that followed the arrests of suspected perpetrators on Karimun Island at the end of October could have contributed to a reduction of reported incidents involving vessels underway in the strait at the end of 2023, however, a return of boardings in January illustrates the persistence of the perpetrators active in the area.

Over the past 12 months, 61% percent of all reported incidents in the region have taken place in the Singapore Strait. Of these, 43% involved perpetrators that were reported as armed. It is likely that most perpetrators are 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 2022, 2023 and 2024 to date (Source: Risk Intelligence System)

During the past twelve months there have been 80 incidents in the straits of Malacca and Singapore (SOMS). Of these, 63 occurred in the Singapore Strait and 17 in the Malacca Strait. Of the total, 46 involved bulk carriers, 19 involved tankers, while 9 involved barges and other craft in tow. The outliers involved general cargo vessels, 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 79% of all SOMS incidents targeted vessels underway, all but three in the Singapore Strait. During the past twelve months, 68% of the Singapore Strait incidents have taken place in the western zone 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.

Incidents in 2022 and 2021 involving hijackings and cargo theft from locally trading ships illustrated the continued vulnerability for smaller local vessels to hijackings and cargo theft, while larger and internationally trading tankers have not been targeted in recent years. These incidents, together with the illegal sale of fuel from tugs and regular related 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, Dumai, 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 Malacca Strait, 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 stabbing in October, an incident took place 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. 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 in turn 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 a failed attack in February 2018. Kidnappings of crew from tugs and fishing trawlers have not succeeded 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, Dumai, 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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