



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 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:

Trump 2.0 - potential impacts on shipping and maritime security

Introduction

The second inauguration of Donald Trump as US president is scheduled for 20 January 2025. Ahead of this date, Trump has already made several claims about what he would do "on day one". While such claims may be dismissed as political bragging, the second Trump administration's foreign policy is indeed very likely to have significant impacts on the shipping industry and maritime security issues around the globe.



China's shipbuilding dominance has caught the attention of some members of the incoming Trump administration (Photo: CSSC Jiangnan Shipyard)

The administration's "America First" policy emphasizes offshore balancing and countering China's influence on trade, technology, and maritime strategy. One example is China's long-standing shipbuilding dominance. This issue has rarely been discussed in recent years but has now been flagged by some likely members of the new administration as a challenge to the US, particularly when it comes to maintaining US influence in crucial maritime areas like the South China Sea.

What are the impacts of "America First"?

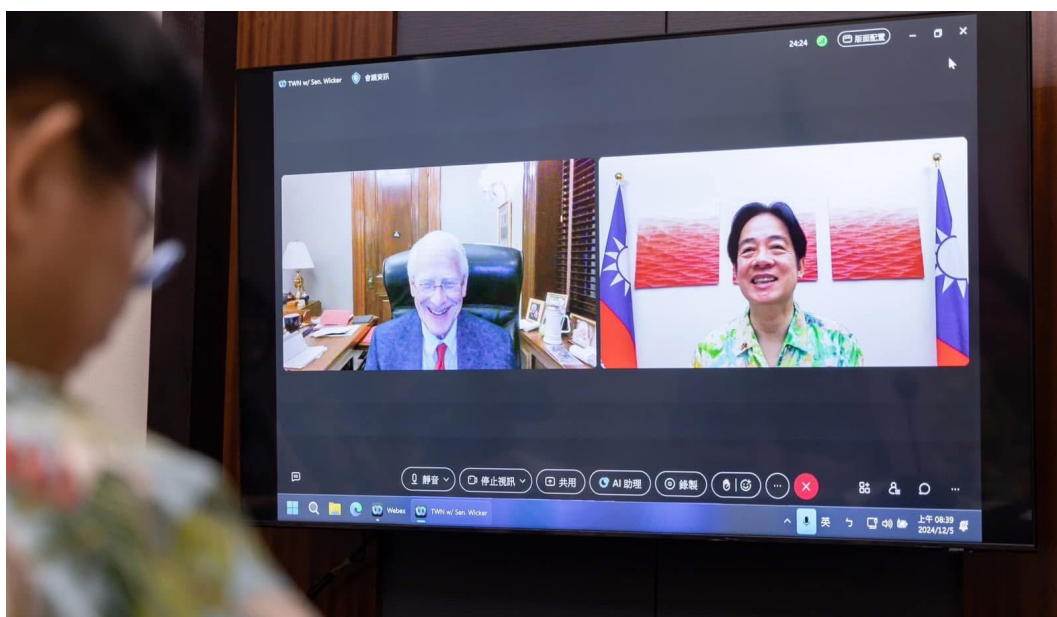
In short, Trump's "America First" policy prioritizes US interests in trade as well as foreign policy. It emphasizes reshoring efforts and countering China's influence, particularly in trade, technology, and maritime strategy.

This translates to initiatives like a four-year national reshoring plan and potential tariffs on all Chinese products imported into the US. Such policies aim to reduce dependency on foreign markets and could significantly disrupt existing global supply chains, impacting maritime trade routes and volumes.

Offshore balancing is another aspect of the "America First" policy. This translates to a foreign policy approach where the US strategically leverages partnerships and targeted power projection to assert its interests, while avoiding overextension. Some potential impacts include:

- Prioritising strategic partnerships: The US will focus on strengthening alliances with key partners, particularly those that share its concerns about China's growing influence.
- Targeted power projection: The US will be more selective in its use of military force and will focus on projecting power in areas that are strategically important to its interests, such as the South China Sea.
- Avoiding overextension: The US will be cautious about getting involved in protracted conflicts or commitments that do not directly serve its interests, e.g. in the Middle East.

In essence, offshore balancing is a more restrained and calculated approach to foreign policy, compared to the more interventionist approach favoured by some previous administrations. It seeks to maintain US global leadership by working through partners and using force judiciously. In addition, the actual partnerships are increasingly based on transactional relationships, highlighted by recent concerns in Taiwan about the future relationship with the United States.



Taiwan's president Lai Ching-te during a call with members of the US Congress in December 2023 (Photo: Taiwan Presidential Office)

Potential implications for shipping

As mentioned above, the Trump administration's policy choices could have major impacts on global supply chains. This would impact maritime trade routes and – by extension – various related issues, including maritime security challenges. The ramifications for the shipping industry, however, will be far from uniform. Potential scenarios across different sectors could look like this:

- Container shipping: Short-term gain, long-term pain – tariffs on imports may lead to a surge to beat tariff deadlines, resulting in higher freight rates in 2025. However, subsequent inventory overhang could result in declining rates in 2026 while overall trade volumes may be reduced in the long term due to tariffs.
- Tankers: Pro-fossil fuel policies in the US may be positive for oil and gas shipping. "Peak oil" may be pushed back which could benefit crude and product tankers. LNG shipping could get a long-term boost due to new project approvals.
- Bulk: Dry bulk faces a complex scenario. While Trump's policies might boost US coal exports, protectionist measures could lead to retaliatory tariffs, impacting agricultural exports. During Trump's first term, China shifted its soybean sourcing to Brazil, a trend that could benefit the dry bulk sector due to longer voyages.

In addition, an increasing number of sanctions could create more complexities. Over time, sanctions might disrupt established trade routes and patterns. Restrictions on the transportation of certain goods could affect specific sectors of the shipping industry.



A container ship off the Californian coast in the US (Photo: Sven Piper/Unsplash)

Moreover, shipping companies will face more pressure to invest in robust compliance measures, including due diligence checks on customers, vessel tracking systems, and meticulous record-keeping. Adherence to sanction regulations is set to become even more complicated over the coming years.

Geopolitical realignment

On the political level, Donald Trump's second term could be positive for US allies across Asia. Trump's focus on bilateral trade deals and his less rigid stance on issues like climate change compared to European nations could lead to increased US-Asia trade, potentially benefiting shipping through longer ton-miles and more two-way traffic.

At the same time, this shift would likely come at the expense of US-European trade relations. Europe's dependence on global trade and its interconnectedness with the US economy makes it particularly vulnerable to the potential negative consequences of a Trump presidency.

Increased trade barriers, weakened alliances, and a shift in focus away from Europe could leave the continent facing significant economic and security challenges. This could have a knock-on effect on European shipping, reducing demand and profitability, particularly in sectors heavily reliant on transatlantic trade.

Conclusion

A second Trump presidency is likely to bring significant changes to geopolitics in general and to the shipping industry as well as to maritime security in particular. While some shipping sectors stand to benefit from his likely policies, others face potential disruptions and uncertainties.

Geopolitical shifts and an additional focus on specific maritime security issues further add to the complexities. Close monitoring of policy developments and their subsequent impact on trade flows will therefore be crucial for stakeholders in the maritime industry.

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

Throughout December, Russian offensive moves have continued along the frontline with some Russian advances, but generally little change from November. Russian forces have continued to target Ukrainian energy infrastructure, with the apparent intention to weaken Ukrainian society's ability to protect itself against the winter.

Both Ukraine and Russia are attempting to position themselves as best as they see possible prior to the incoming Trump administration in the US. While it remains uncertain what the new administration will prioritize, statements and attacks during December by both Russia and Ukraine are likely attempts of positioning prior to potential peace or ceasefire negotiations.

Although this is likely to continue in 2025, the intensity of attacks and boldness in statements is likely to vary. During December, the outgoing Biden administration has continued to seek to shore up current and promised supplies of both financial and military support to Ukraine.



Ukrainian president Volodymyr Zelenskyy and US president-elect Donald Trump with French president Emmanuel Macron in Paris in December 2024 (Photo: Ukraine Presidential Office)

Russian forces launched an attack on Ukrainian energy infrastructure on 25 December. Ukrainian forces claim to have shot down most of the Russian missiles and drones, but some still damaged various local power networks, resulting in outages. Following previous attacks, especially on energy infrastructure, Ukrainian port authorities announced that they were better prepared to limit the operational impact. However, some disruptions cannot be ruled out.

The ability of Russia to threaten and attack Ukrainian energy infrastructure remains dependent on Ukrainian capabilities to protect these facilities. While the contact line continues to change, albeit marginally, the ongoing Ukrainian incursion into Russia also continues.

Localised scheduled power outages were often reported throughout Ukraine in December and are expected to continue in 2025, including scheduled power cuts. Russian forces are likely to continue to target Ukrainian civilian infrastructure including ports. Knock-on impacts for port operations are likely to differ even though at least some impact should be expected.

Risk Intelligence also offers a weekly report which includes an up-to-date situational picture for port calls and other types of commercial maritime operations in the northern part of the Black Sea.

Black Sea situation

Across the Black Sea, the regional security picture varies depending on the operational area. Impacts or disruptions caused by military operations are most likely in the northwestern part. Military operations also occur in the wider Black Sea, including with naval and aerial drones which are used for military operations in the eastern Black Sea. Military operations targeting Russian and Ukrainian coastal military infrastructure or related equipment have also included attacks against Russian and Ukrainian port infrastructure and port cities.

Incidents have been reported at Ukrainian Danube ports as well. Further attacks cannot be ruled out, but these are less likely than in Ukraine's larger ports. Direct targeting of merchant ships is unlikely, even though two vessels were apparently deliberately targeted in 2024. Collateral damage to ships in Ukrainian ports or in the vicinity is a greater concern. Vessels may be damaged when ports or surrounding cities are targeted by Russian missile and drone attacks during the ongoing war.

Warnings about and sightings of naval mines, particularly in the western and northwestern Black Sea, occur infrequently. Some incidents have impacted maritime operations, with demolitions and similar future incidents possible as far south as Turkey.

Power outages occur throughout Ukraine and can impact port operations on short notice. Further likely implications for maritime operations include complications with crew changes, with known cases of complications based on nationality and operational impact by sanctions targeting trade with Russia.

The Ukrainian Black Sea 'humanitarian' corridor and participating Ukrainian Black Sea ports, are operational in accordance with the IMO Circular Letter 4748. The corridor is relatively secure to use, although the general security situation in Ukraine is dictated by the ongoing war with Russia. The situation remains highly volatile, local operational differences and issues should be expected.

Two incidents involving vessels in 2024 underlined that Russia is prepared to deliberately target commercial ships en route to or from Ukraine in specific cases. Given that Russia had previously announced that any ships travelling to Ukraine's Black Sea ports will be viewed as possibly carrying military cargo, similar incidents remain possible. The threat highlights the Russian focus to impact any traffic into Ukrainian Black Sea ports. Furthermore, Russia has not withdrawn the prohibition of navigation north of 45-21N, as announced at the start of the war in February 2022.

The Ukrainian defence ministry has also announced that Ukraine would consider all ships travelling to Russian Black Sea ports as potentially legitimate targets, likely in response to the Russian announcement. It is unclear to what degree Ukraine is prepared to act on this statement. The overall security situation can change at short notice.

Other threats in the Black Sea include GPS spoofing and jamming, fraud and corruption as well as smuggling. Politically charged demonstrations can also impact regular operations in various coastal countries, although these are not known to directly target the maritime sector.

Summary and forecast

It is very likely that events in 2025 will strongly resemble 2024, although some differences may impact how the war in Ukraine develops. Intensified Russian attacks on Ukrainian civilian infrastructure in 2024, particularly against power generation and energy distribution networks, resulted in countrywide power cuts throughout the year. These attacks are likely to continue.

There were also merchant ships targeted during 2024, based on Russian claims about these vessels transporting military equipment to Ukraine. In effect, Russia was merely acting upon a threat issued at the start of the full-scale invasion, stating that ships which they perceived as carrying military equipment would be seen as legitimate targets. Similar incidents cannot be ruled out in 2025.

While it is possible that some form of ceasefire will occur during 2025, it is more likely to happen during the second half as both Russian and Ukrainian forces and political powers seem willing to continue the war for the foreseeable future. While both Moscow and Kyiv have signalled interest in talking, there is no consensus on what the talks should be based on, let alone the objectives.

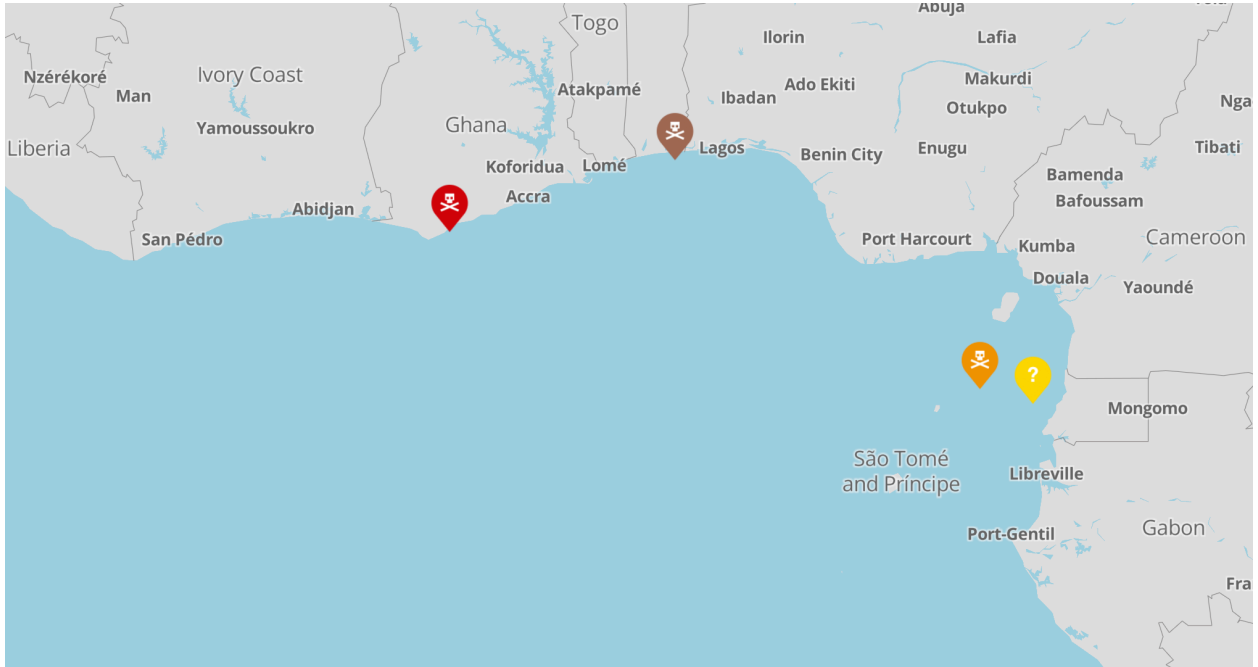
Further information

Risk Intelligence provides a weekly threat assessment specifically for ports in the northern part of the Black Sea. The report covers both the operational and the security situation for various ports.

In addition, the report provides an up-to-date overview of the current situation in Ukraine and the northern Black Sea, including concise information regarding the status of exports of grain and other types of cargoes from Ukrainian ports.

West Africa

Events included in this report occurred between 1 and 31 December 2024, shown on the map below. Further incident details are available on the Risk Intelligence System.



Incidents

5 December – Fishing vessel FAYALI 2 boarded

Kidnap/ransom, Cotonou anchorage (Benin)

5 December – Bulk carrier IRENE boarded

Armed robbery at sea, Takoradi anchorage (Ghana)

5 December – Container ship LETO approached

Suspicious activity, Gulf of Guinea

5 December – Offshore supply vessel BOURBON LIBERTY 234 attacked

Failed kidnap/ransom, Gulf of Guinea

Assessment

Nigeria / Niger Delta

Attackers operating off the southern and eastern Niger Delta remain the most significant potential threat for merchant ships in international trade operating in the Gulf of Guinea. Few

pirate attacks have been reported in 2024 but the threat was underlined by three incidents in December, described in detail in the next section.

Attacks against local vessels in or near the Niger Delta highlight the fragile security situation in this part of Nigeria. These attacks are often linked to other illicit activities, namely to oil-related crimes, or to conflicts between oil companies and local communities.

Overall, crude oil theft and smuggling of illegally refined oil products have long been major concerns for the Nigerian government. Such activities generate significant revenues for organised criminal groups across the Niger Delta. In recent years, profit margins have skyrocketed, leading to a drop in piracy as criminal groups have concentrated on these much more profitable operations.

As a consequence, Nigerian crude oil production and export levels remain suppressed. Monthly production figures show shortfalls of up to 20% to the target set in the annual government budget. Subsequent revenue shortfalls limit government efforts to boost economic growth and development in the Niger Delta as well as in other parts of the country.



Nigerian military personnel inspecting a destroyed illegal refining site in Abia state in the Niger Delta (Photo: Nigerian Ministry of Defence)

Security agencies carry out frequent operations to limit oil theft. In December, Nigerian security agencies once again announced the destruction of dozens of illegal refining sites in several Niger Delta states as well as seizures of stolen crude oil and illegally refined oil products. These efforts are part of Operation Delta Sanity, ongoing since January 2024. Similar military operations have been carried out in recent years, yet these have not led to sustainable improvements.

Despite efforts by the military and other security agencies, the security situation in the Niger Delta remains fragile. For years, the Nigerian government has attempted to "pay off" criminal or militant groups in the region through security contracts. Meanwhile, underlying economic conditions have not been addressed.

Initiatives to combat crude oil theft and illegal refining will therefore remain largely window-dressing, although short-term improvements of the situation are possible. Maritime operators should monitor developments as an uptick in attacks against merchant ships is possible anytime.

Successful boardings of merchant ships are 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 upcoming dry season which will last until about March enable operations deep offshore with small boats. 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 dozens of companies which have signed a memorandum of understanding (MoU) with the Nigerian Navy.

The MoU is the only 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 reported as piracy involve ships solely trading within the region. Such incidents are unlikely to be genuine piracy 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.

Forecast

The threat level in the coming month remains high off the Niger Delta, despite limited numbers of incidents in recent months. Pirate attacks are possible at distances of up to 250 nm from the coastline, particularly during the current dry season which will 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)

There were four maritime security incidents in December, highlighting different types of threats in this region.

In early December, the Chinese master was kidnapped when his fishing vessel was attacked by armed men at the Cotonou anchorage off Benin. He was released after three weeks, reportedly after a ransom had been paid. Nevertheless, it is likely that this incident was related to other illicit

activities at sea rather than a typical attack with the aim to kidnap seafarers in an attempt to obtain a ransom payment.

On 21 December, two incidents then took place on the same day. The first involved a container ship which was approached and shot at during the night around 35 nautical miles off Bata (Equatorial Guinea). During the late evening on the same day, an offshore supply ship was then boarded around 60 nautical miles away from the first incident. All crew members had been able to assemble in the citadel and the perpetrators were unable to break into the room. The attackers then escaped after damaging onboard equipment.

Given the location of both incidents and the description of the perpetrators, it is likely that the same group was responsible. It is at least possible that the men were engaged in other illicit activities and were trying to kidnap seafarers during their return to the Niger Delta. Similar opportunistic attacks have been carried out in this area in previous years as well.

Finally, a bulk carrier was boarded at the Takoradi anchorage off Ghana. Similar incidents are frequently reported but perpetrators usually escape upon discovery by the crew. In this case, however, crew members were threatened at knifepoint, highlighting that there is a potential for violence when intruders are directly confronted.

Overall, the security situation at sea has improved in recent years. However, limited capabilities of naval and law enforcement agencies as well as a lack of cooperation between these agencies on the national and regional level remain ongoing issues. These aspects have a negative impact on maritime security, manifested in a range of issues, e.g. illegal fishing and an increasing amount of cocaine smuggling particularly through West Africa.

Limited financial and human resources will remain a concern for maritime security agencies 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 are closely linked. Illicit operations in general have remained stable or even increased in the recent past. Alleged pirate attacks may also be a cover for other types of illicit activities.

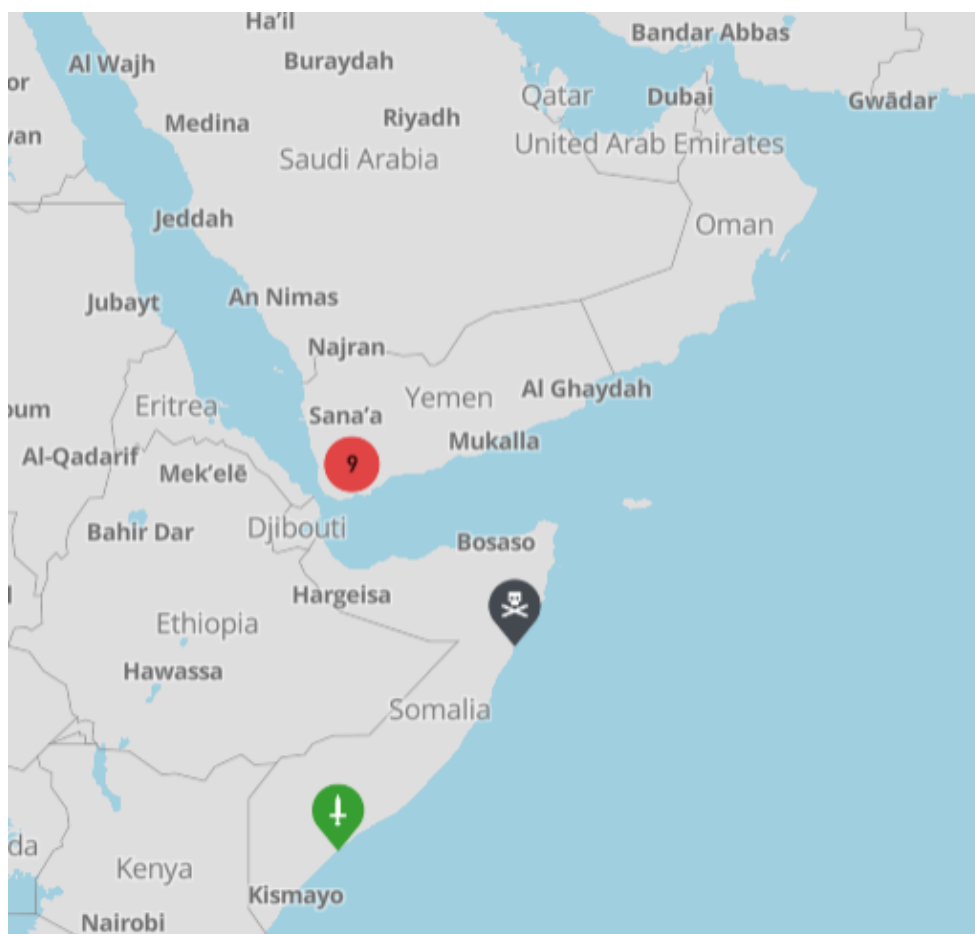
Forecast

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 ship hijackings for the purpose of cargo theft is 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 December 2024, shown on the map below. Further incident details are available on the Risk Intelligence System.



Incidents

1 December – Fishing vessel hijacked

Hijacking at sea, Somali Basin

24 December – US AFRICOM reports airstrikes on al-Shabab targets

Counter-insurgency operation, Somalia

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

There were nine incidents in the Red Sea and western Gulf of Aden in November, including two attacks on merchant ships in the Gulf of Aden and two incidents where Houthi attacks were reportedly intercepted by naval forces. The other five incidents were military strikes against targets in Yemen by US or Israeli forces.

Assessment

Southern Red Sea – Gulf of Aden

This area covers shipping routes which are affected by the conflict in Yemen, including operations by Houthi forces to target shipping linked to Israel as well as the US and the UK.

Attacks against merchant ships by Houthi forces remained at a low level in December with just two attacks reported. The attacks took place in the western Gulf of Aden, where there were also two incidents of Houthi attacks which were reportedly intercepted by US naval forces. No incidents affecting merchant ships were reported in the Red Sea.

The number of monthly attacks has been below ten since July. The Houthis have likely concluded that their campaign of reducing Israel-linked traffic in the region has been successful and requires only limited numbers of attacks to maintain deterrence.



Oil storage tanks on fire in Hudaydah following an Israeli strike (Photo: Almasirah Television)

US forces reported that they carried out several strikes against Houthi targets. Israeli forces also carried out strikes on 19 and 26 December, targeting the Ras Isa terminal on the former and various coastal and inland targets on the latter. Israel's actions were in response to an increasing number of attacks by the Houthis against Israel, with at least ten incidents reported during December. That was the highest monthly total in the conflict so far.

The Israeli strikes marked an escalation in Israel's response with more extensive targeting intended to disrupt Houthi port operations. Israeli defence minister Israel Katz issued a direct threat to the group's leaders, saying: "Israel's long hand will reach you too. Whoever harms us will be harmed sevenfold". Supreme Political Council member Mohammad Al-Houthi said, "the Israeli and American attacks on civilian objects in Yemen are war crimes that must be condemned", but they "will not halt our military operations."

The fall of the Assad regime in Syria is not expected to have an immediate impact on the Red Sea crisis. It is possible that the successive failures of Iran's protégés, namely Hezbollah and Bashar al-Assad, will lead to a recalibration of Iran's strategy. This might push Iran to reconsider the nature of its support to entities who have proven unable to resist or hold territory on their own, but it might also shift attention to the Houthi campaign and its future.

In addition to Houthi-related activity, other forces operate in the area as well, notably the Eritrean coastguard. Merchant ships 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

Additional attacks should be expected at a tempo where the Houthis can continue to pressure Israel and the international community. The threat level is expected to remain severe for vessels linked to Israel, the US, and the UK, and elevated for all other ships. This will remain the case even as the number of attacks continues to be relatively low. The naval presence is providing some support to merchant traffic but is not a sufficient deterrent to prevent all Houthi attacks.

Military action has likely degraded some Houthi capabilities, but the Houthis retain numerous drones which are easier to deploy than anti-ship missiles. The focus is expected to remain on the Red Sea and the Gulf of Aden where ships can be easily identified and targeted. If the Houthis continue to target Israel directly, further Israeli strikes on Houthi territory should be expected, possibly affecting port operations.

Gulf of Oman – Persian Gulf

There were no incidents reported in this area in December. Iran has not carried out additional strikes against Israel, in response to Israeli strikes on Iranian targets in October. Despite its rhetoric, Iran has been reluctant to escalate the conflict and now faces the challenge of trying to rebuild Hezbollah in Lebanon following Israel's military campaign. Moreover, Iran suffered a severe setback to its regional foreign policy with the collapse of the regime in Syria and the rapid shift to a new government in the country after 14 years of civil war.

Despite the absence of incidents in the past six months, Iran's approach has not fundamentally changed. Iran retains the option to carry out limited operations in its maritime backyard – particularly of the type seen in 2023 and prior: limited strikes against specific ships directly linked to Israel through ownership or management, or attacks against ships linked to a commercial dispute (including US-linked vessels). Iran has undertaken these operations to retaliate without substantial risks of escalation.

Iran has, however, suffered two significant setbacks with the degradation of Hezbollah in Lebanon and the defeat of its ally in Syria. Much of the analysis taking place is now focusing on what Iran will do next. There has also been a renewed focus on the future of the Houthis in Yemen,

particularly following the increased intensity of Israeli strikes. A Houthi spokesperson recently addressed calls by political factions within the Yemeni government for military action against the Houthis, similar to events in Syria. He said that the situation in Yemen is nothing like Syria and that any military escalation would translate into a full-blown land, air, and naval conflict.

Forecast

There has been a heightened threat to merchant ships in the Gulf of Oman and Persian Gulf for some time, due to Iran's targeting of certain ships to make broader political statements. Iran is balancing leadership in 'resistance' to Israeli operations in Gaza with avoiding an escalation in the conflict with Israel. Low-level operations – such as assistance to the Houthi campaign – help to show such leadership.

Iran is reluctant to escalate the conflict with Israel but has various asymmetric options to continue to pressure Israel, including in the maritime environment. Iran will, however, be cautious to avoid wider regional implications to its own security – particularly as Israel is increasingly taking military action throughout the region in Syria and Yemen.

There is also a threat of vessel boardings and seizures as Iran uses 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 ships or ships related to Iran's crude oil trade as well as Israel-linked ships.

Somali Basin and wider Indian Ocean

There was one maritime incident in this area during December. The China-flagged fishing vessel LIAONING DAPING 578 was hijacked off the Somali coast on 01 December. Analysis by EUNAVFOR and MSCHOA concluded that the vessel is being held as part of a dispute with local fishermen. Local authorities are working to resolve the matter, together with Chinese diplomats. According to media reporting quoting Somali officials, the men holding the vessel and crew are demanding a ransom of \$10 million. The vessel was issued with a fishing licence by Puntland in 2020, but the licence had expired.

EUNAVFOR subsequently confirmed in a press release that the fishing vessel remains under the control of the alleged pirates and in Somali territorial waters. A warship has been monitoring the situation and gathering information, including conditions of the crew on board, as well as on the perpetrators. The crew remains safe with no injuries reported.

There have been no other recent pirate attacks. Naval action has been particularly effective against pirate activity, led by the Indian Navy – responsible for freeing the RUEN and the LILA NORFOLK. One pirate group was able to hold the ABDULLAH off Somalia, however, and a ransom of a claimed \$5 million was paid for the ship's release in April.



A naval vessel monitors the hijacked LIAONING DAPING 578 (Photo: EUNAVFOR)

There might not be the shore-based infrastructure to support large-scale piracy activities similar to the situation a decade ago. Nevertheless, the ABDULLAH ransom shows that there are still financial incentives for opportunistic pirate attacks despite the deterrent factor of naval operations. The LIAONING DAPING 578 case also shows that fishing disputes – and the complicated politics surrounding fishing licences in the Somali Basin – might be the primary driver for piracy in the near future, rather than traditional hijackings of merchant ships.

Since the initial surge in pirate attacks in late 2023 and early 2024, related activity has moved back closer to the Somali coast and the Gulf of Aden as a result of the monsoon period but also likely a greater reluctance amongst perpetrators of operating farther out in the Indian Ocean where naval vessels are patrolling. EUNAVFOR estimates that there are no more than three pirate groups in operation.

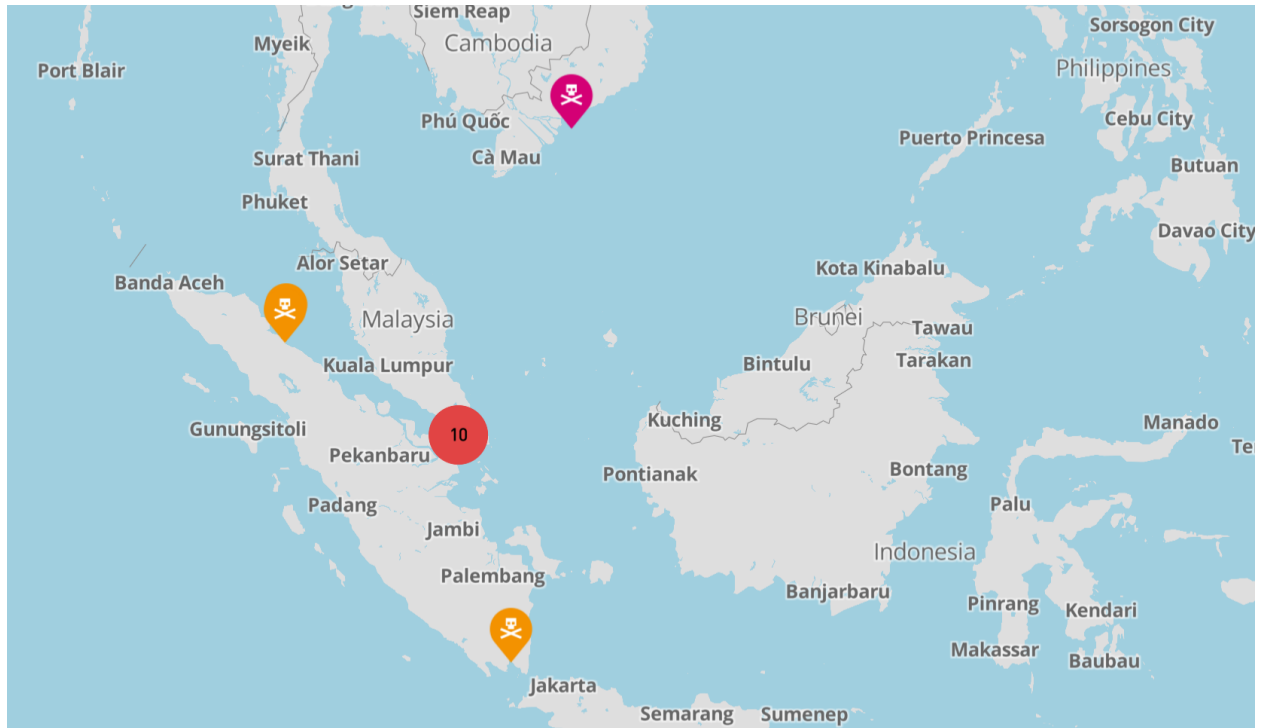
Forecast

Opportunistic boardings remain possible in this area, even beyond 500 nautical miles from the coast, but levels of activity are expected to vary based on local conditions and naval activity. The threat level is assessed to be elevated but trending downward.

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 militant Islamist group al-Shabab, including US airstrikes in December. There is only a limited maritime dimension to this conflict which is not expected to affect merchant ships over the next month.

South East Asia

Events included in this report occurred between 1 and 31 December 2024, shown on the map below. Further incident details are available on the Risk Intelligence System.



Incidents

2 December – Bulk carrier SAKIZAYA MIRACLE boarded underway

Armed robbery at sea, Singapore Strait

3 December – General cargo ship PAC ALNATH reports attempted boarding

Failed theft, Port of Belawan (Indonesia)

7 December – Bulk carrier GENCO AUGUSTUS boarded underway

Failed robbery, Singapore Strait

7 December – Bulk carrier KYZIKOS boarded underway

Theft, Singapore Strait

9 December – Crude oil tanker DALMA boarded underway

Theft, Singapore Strait

11 December – Crude oil tanker PROTEUS HARVONNE boarded underway

Failed robbery, Singapore Strait

11 December – Barge LKH 2882 boarded underway

Theft, South China Sea

14 December – Bulk carrier HONOR STAR boarded underway

Armed robbery at sea, Singapore Strait

14 December – Bulk carrier AM OCEAN PRIDE boarded at anchorage

Failed robbery, Tarahan anchorage (Indonesia)

17 December – Bulk carrier CAPE STAR boarded underway

Armed robbery at sea, Singapore Strait

19 December – Container ship NORDMAAS boarded underway

Theft, Port of Vung Tau (Vietnam)

22 December – Crude oil tanker FRONT EAGLE boarded at anchorage

Failed theft, Singapore Strait

28 December – Bulk carrier ROSTRUM HEDONIST boarded underway

Armed robbery at sea, Singapore Strait

29 December – Tanker prevents boarding

Failed theft, Belawan anchorage (Indonesia)

Assessment

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

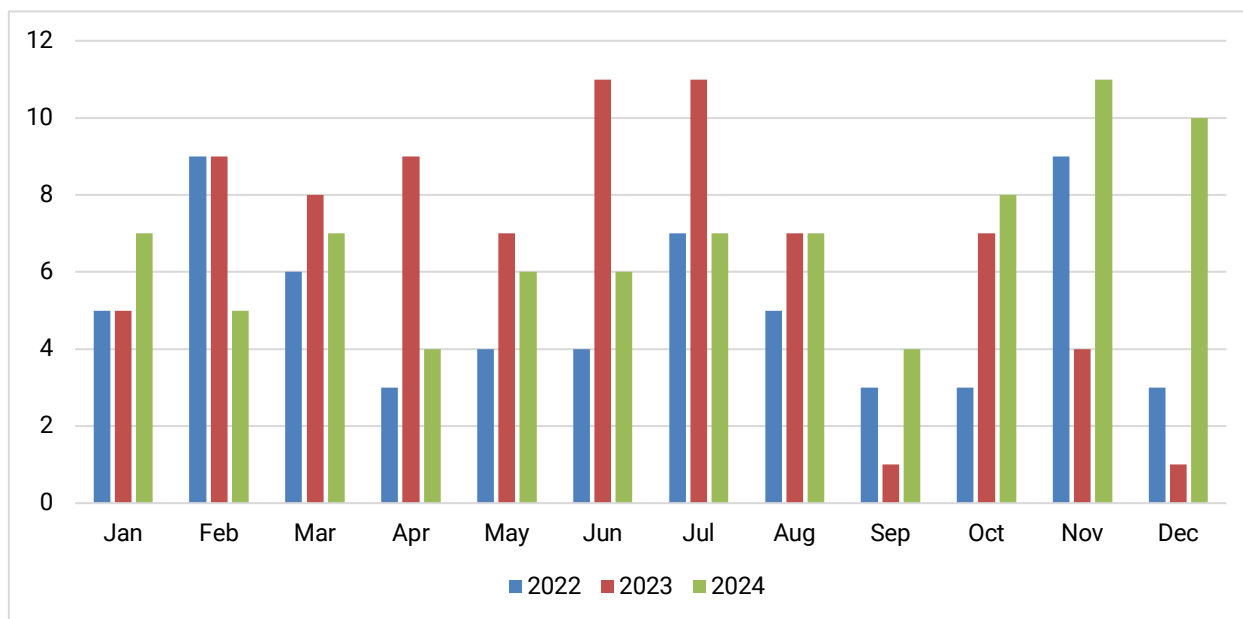
Boardings in the form of thefts and armed robberies remain the prevalent threat for merchant ships within these areas. Fourteen incidents were recorded in South East Asia in December. Of these, 50% involved armed perpetrators and 79% took place within the boundaries of the Singapore Strait (where all incidents involved bulk carriers and tankers in transit).

Beyond the incidents within the Singapore Strait, two were recorded at Belawan (one at anchorage and one alongside), one at Vung Tau anchorage, one at the anchorage off Bukit Asam Coal Terminal, and one barge boarding took place in the southern South China Sea.

While the activity recorded in December illustrates the typical nature of crimes in the region, the trend of perpetrators acting more aggressively towards crew members remains a cause for concern.

Over the past 12 months, 68% percent of reported incidents in the region have taken place in the Singapore Strait. Of these, 61% involved perpetrators reported as armed. Most perpetrators are likely carrying knives, even though weapons may not be observed during incidents. As the borders

of Indonesia, Malaysia and Singapore intersect in the Singapore Strait, perpetrators appear to take advantage of jurisdictional challenges, improving their ability to escape.



Number of maritime security incidents in the Straits of Malacca and Singapore per month in 2022, 2023 and 2024 (Source: Risk Intelligence System)

There have been 82 incidents in the Straits of Malacca and Singapore (SOMS) during the past 12 months. Of these, 67 occurred in the Singapore Strait and 15 in the Malacca Strait. Of the total, 51 involved bulk carriers, 13 involved tankers, while 8 involved barges and other craft in tow. The outliers involved general cargo vessels, heavy lift vessels and OSVs. No incidents in the SOMS have involved container ships or passenger vessels.

Overall, 78% of all SOMS incidents during this period targeted ships underway, all but one in the Singapore Strait. During the past twelve months, 82% 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 boardings at anchorages and while alongside.

Like the Java Sea tug hijackings in February and September this year, similar incidents in previous years that involved locally trading tugs and small tankers illustrate the vulnerability of regionally-trading vessels to hijackings for cargo theft. Larger and internationally trading tankers have not been targeted by hijackers in recent years. These incidents, together with the illegal sale of fuel from tugs and regular related law enforcement interventions in the region, further illustrate that black market trading of fuel at sea continues.

Armed robbers and thieves usually board vessels at night and target supplies, equipment and engine spares while avoiding crew. Areas with the highest frequency of criminal activity during the past twelve months include the Singapore Strait, and the ports of Balikpapan, Batangas, Batu Ampar, Belawan, Dumai, Manila, Sandakan and Vung Tau. A new location of incidents is Indonesia’s port of Kuala Tanjung on the Malacca Strait where bulk carriers have been boarded by armed robbers at the anchorage and alongside the terminal berth this year.

Although the majority of boardings involving vessels underway take place in the SOMS, during the previous 12 months in addition to the Java Sea tug hijackings, two barges in tow were boarded in the South China Sea. Most incidents in the region involve bulk carriers and tankers. Boardings of oil rigs are infrequent and generally involve the theft of equipment and supplies.

Incidents during the past 12 months illustrate that crew members may be tied up or injured during attacks, as illustrated by the PROTEUS HARVONNE incident during which one crew member suffered deep cuts to his hands and fingers and cuts to his shoulder, the severity of which required a one-week hospital stay. In October 2023, a master was stabbed and there have been other incidents during which seafarers have suffered head injuries. In July 2022, perpetrators tied up and threatened a seafarer at gunpoint while stealing engine spares.

The two aforementioned Java Sea tug hijackings, the hijacking of a tug in March 2023 during which palm seed batches were stolen from the barge in tow and a bunker barge hijacking off Sulawesi in January 2022 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 cargo 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. As fuel subsidies in the region are being withdrawn, price increases could drive sustained or increasing fuel smuggling and sales in the South China Sea, Sulu/Celebes Seas and the SOMS. Demand for bio-fuel products could be another driver motivating hijackings. In turn, 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 suppressed. No cargo vessels have been targeted in the Sulu/Celebes Seas since 2018.

Forecast

In the coming month, the threat of boardings of vessels underway or at anchor for theft or armed robbery is moderate. Higher threat locations include the Singapore Strait and the anchorages at Balikpapan, Batu Ampar, Batangas, Belawan, Dumai, Kuala Tanjung, Manila, Sandakan and Vung Tau. Threat levels are lower 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 and tugs. 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 high-profile threats such as piracy and armed robbery at sea as well as insurgency attacks. It does not include all other threats to merchant ship operations, e.g. 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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