RiskIntelligence

Security Threat Update: Red Sea / Gulf of Aden

2 January 2025

Table of contents

Security Threat Update: Red Sea / Gulf of Aden

This report provides an overview of the situation in the southern Red Sea and the Gulf of Aden including an assessments of threat levels for attacks against different types of merchant ships operating in these areas.

Time of latest intelligence included in this report: 2 January 2025, 08:00 UTC.

Recent incidents (Red Sea / Gulf of Aden)

Below is a short overview of incidents directly affecting merchant ships in the southern Red Sea, the Bab el Mandeb and the Gulf of Aden which have been recorded on the Risk Intelligence System during the past 30 days.

Comprehensive descriptions for these and previous incidents can be found on the Risk Intelligence System. Detailed statistics of attacks against commercial shipping which have been carried out by Houthi forces since November 2023 are also available on the Risk Intelligence System.

1 December	09:32 UTC	Container ship MAERSK SARATOGA reports explosion

6 December	Unknown	Merchant ship reports attack

Current situation

The situation across the Middle East remains unchanged. Israeli military operations in Gaza and Syria continue, along with reports of Israeli strikes in Yemen, which reportedly knocked Hudaydah port out of commission.

There is increasing speculation that Israel may ramp up its offensive actions against the Houthis, as the Israeli government adopts a harsher rhetorical stance against the Houthis and engages in significant strikes against Yemeni targets, in retaliation for a recent wave of Houthi attacks.

US forces have carried out military strikes against targets in Houthi-controlled areas of Yemen since January, both unilaterally and as joint strikes with the UK military, supported by several other countries. The overall rate of these strikes has been limited in recent weeks. Israeli forces have also carried out retaliatory air strikes in Houthi-controlled areas on at least two occasions.

US-coordinated offensive military actions are conducted under Operation Poseidon Archer. For political reasons, these are separate from the US-led Operation Prosperity Guardian which is merely aimed at protecting commercial shipping.

Since the beginning of the Houthi campaign in November 2023, Houthi forces have largely stuck to publicly announced targeting criteria. While some attacks apparently relied on outdated information about individual ships, such incidents have not been reported in recent months. Based on available evidence, Houthi attacks against merchant ships have not been 'indiscriminate' as often claimed by the US and other Western governments.

The Houthis have publicly committed to continue attacks against merchant ships at least as long as Israel would conduct military operations in Gaza and Lebanon. It is assessed that they intend to continue these attacks as long as it is politically profitable to them.

In recent weeks, the enmity between Israel and the Houthis has intensified. The Houthis engaged in a wave of attacks against Israel, prompting Israel to respond with significant strikes across Houthi-controlled Yemen. These Israeli strikes notably included an attack on Sana'a airport while the head of the World Health Organisation was in the building, leading to further condemnations in the diplomatic field of both the Houthis' and the Israelis' behaviour.

Diplomatic activity, including a mediatised intervention by Israeli Ambassador to the UN Danny Danon, suggests that Israel may intend to pivot attention towards the Houthi issue, potentially exploiting a Trump presidency to obtain more freedom of manoeuvre in that regard. While recent evolutions in the Levant certainly allow for Israel to reallocate some firepower towards Yemen, geography and domestic political concerns still place a limit on how much damage Israel can do against the Houthi regime. Finally, it should be mentioned that articles and news mentions on the topic could be part of opinion-shaping operations prior to larger-scale operations against the Houthis.

Threat levels

In the Red Sea and the Gulf of Aden, Houthi forces have expanded their list of potential targets several times since November 2023. Some attacks were likely carried out based on outdated information in publicly available databases, underlining the threat level for collateral damage.

Potential targets	Threat type	Threat level
Merchant ships specifically linked to Israel through ownership, port calls, trade with and/or commercial relationship between Israeli companies and owners/operators	Kinetic attack (missile, aerial/waterborne drone), possibly seizure and detention	**Severe**
Merchant ships linked to the United States, United Kingdom and other countries involved in Operation Poseidon Archer	Kinetic attack (missile, aerial/waterborne drone), possibly seizure and detention	**Severe**
Merchant ships linked to countries participating in or supporting Operation Prosperity Guardian or Operation Aspides	Kinetic attack (missile, aerial/waterborne drone), possibly seizure and detention	**Elevated**
Other merchant ships in transit through the Red Sea/Gulf of Aden	Kinetic attack due to misidentification, potential proximity to the above threats ('collateral damage')	**Elevated**

Military operations against the Houthis have resulted in a severe threat level for merchant ships linked to the US and the UK through ownership. Based on Houthi announcements, the group will also target vessels which are owned by companies that are trading with Israel, leading to a severe threat level for these ships as well.

Despite ongoing military operations, Houthi forces remain capable of conducting attacks. These are not limited to the southern Red Sea where they control a large portion of coastline. Several ships have also been struck in the Gulf of Aden. Attacks by drone boats, however, are very likely limited to the southern Red Sea.

While t h e   H o u t h i es to launch missiles' have been likely degraded by military strikes, the strikes' actual impact cannot be assessed. Moreover, reports about military actions are solely based on military sources and not independently verified. Any meaningful and sustainable reduction of the threat posed by the Houthis would require a longer-term mission.

For merchant ships linked to countries solely supporting Operation Prosperity Guardian or the EU-led Operation Aspides which both have a defensive mandate, the threat level is assessed as lower compared to countries participating in offensive military actions against Houthi forces. For all other commercial ships, the same threat level applies.

For vessels related to countries taking part in Operation Prosperity Guardian or Operation Aspides, this is largely due to the potential for kinetic attacks in lieu of other potential targets for Houthi forces. However, considering their selection of targets, this is currently unlikely.

Vessels not related to countries taking part in Operation Prosperity Guardian or Operation Aspides may be targeted due to misidentification. Proximity to kinetic attacks or to interceptions of drones and missiles by military forces could also lead to collateral damage.

Finally, it is vital to consider that the situation remains dynamic and requires close monitoring. Updates regarding incidents as well as constantly updated assessments of current threat levels are available through the Risk Intelligence System.

Background

Starting with the seizure of the GALAXY LEADER on 19 November 2023, Risk Intelligence has identified dozens of attacks by Houthi forces in the Red Sea and the Gulf of Aden. The frequency of attacks against merchant ships has decreased in recent months, although this is very likely due to the limited number of potential targets and to the fact that the Houthis have firmly established the threat.

This analysis is supported by traffic figures which suggest that the shipping industry has adapted to the situation. Even when no attacks had been conducted by the Houthis for several weeks, maritime traffic did not increase. At the same time, clusters of attacks have not caused a further decrease in traffic either (see Figure 1).
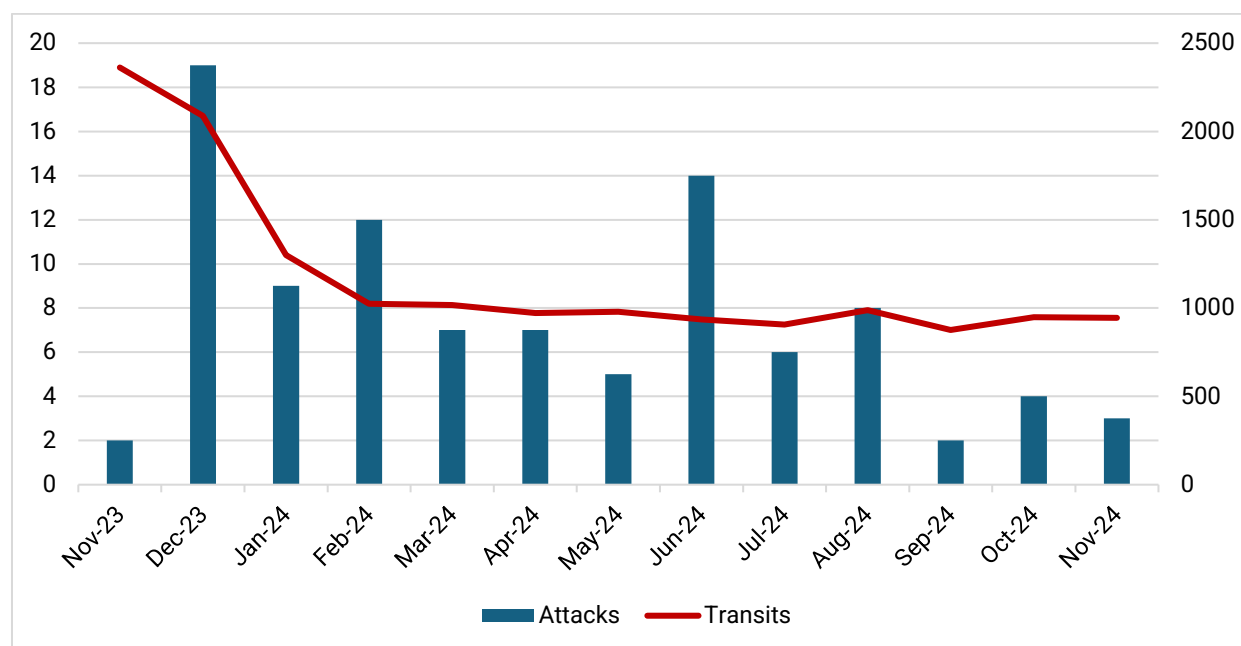

Figure 1: Attacks against merchant ships per month (blue columns) and number of monthly Bab el Mandeb transits by merchant ships >10,000 dwt (red line) (Source: Risk Intelligence System / L l o y d ' s List Intelligence/Seasearcher)

Note: Detailed statistics about Houthi attacks against commercial ships in the Red Sea and the Gulf of Aden since November 2023 are also available on the Risk Intelligence System.

Figure 1 above also indicates that the Houthis have reached their goal and are more likely to be reacting to political events than to maritime activity in the Red Sea and the Gulf of Aden. The amount of maritime traffic in this area has remained steady since February 2024, regardless of attack levels. Following an adaptation phase in December 2023 and January 2024, the shipping industry settled on a "new normal" which involves re-routing merchant ships away from Red Sea transits.

It is unlikely that maritime traffic will decrease further. The current level has remained virtually unchanged since late January 2024. The decision to return to the Red Sea will very likely be determined by economic factors. e.g. insurance premiums or pressure from charterers, possibly supported by political declarations that would placate the Houthis.

Ongoing military missions have not lowered the threat level for commercial shipping substantively. Currently, there are no indications that either party involved, namely the Houthis, Israel or the US, intends to push for a resolution to the situation.

For transits through the Gulf of Aden and the Red Sea, it should be noted that naval recommendations to switch off AIS are not based on credible figures. Both the EU-led and the US-led military operations have published data about the targeting of merchant ships transiting the area with or without AIS on. These statistics, however, do not align with each other. At the same time, raw data used for the analysis has not been made public.

The results of the analysis are therefore at least questionable, underlined by debateable public statements from Operation Aspides officials which have claimed that no ship with AIS off has been successfully targeted by the Houthis.

Overall, there is no evidence to suggest that switching off AIS lowers the chances of vessels being targeted. It may limit the success rate for missile attacks in particular, but this does not necessarily apply to attacks conducted by aerial or naval drones. Moreover, not broadcasting AIS may complicate efforts to support a ship after an attack.

It is noteworthy that less than 10% of merchant ships transiting through the Bab el Mandeb are conducting their voyages without AIS. This figure has not changed significantly over the past months, shown in Figure 2.
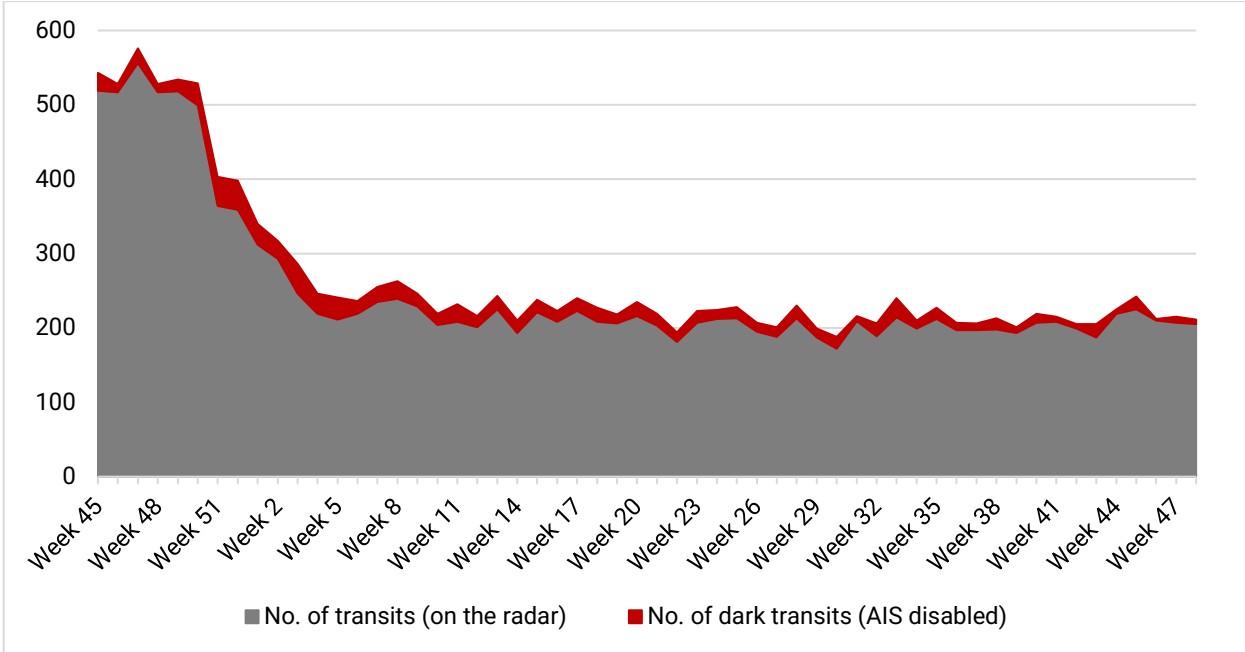

Figure 2: Number of weekly Bab el Mandeb transits by merchant ships with and without AIS (Source: Lloyd's List Intelligence/Seasearcher)

The current threats in the Red Sea and the Gulf of Aden have led to a noticeable increase in incidents that are perceived as suspicious by seafarers. Reporting such incidents is strongly encouraged. At the same time, all reports must be thoroughly assessed to identify particular areas of concern.

The background to the current situation is the civil war in Yemen. Since 2015, the Houthis in the northern part of the country have fought against the Saudi and UAE-backed government in southern Yemen. Iran has supported the Houthis during the conflict.

The Saudis and the Houthis are involved in difficult negotiations about a peace agreement. Neither side wants to jeopardise a potential deal. Saudi Arabia has refrained from criticising the Houthis during their current campaign which is a noticeable difference from Saudi rhetoric in the past. Moreover, attacks against commercial shipping have not interrupted the negotiations although it is impossible to assess when a final agreement will be signed.

Guidance on commercial operations

Ship transits

Several shipping industry organisations have published the "Interim Industry Transit Advice, Southern Red Sea and Gulf of Aden – September 2024". Among other information, the document includes considerations about routing and vessel hardening. The Joint Maritime Information Centre has also issued bridge emergency reference cards in October 2024.

Both documents are available via www.maritimeglobalsecurity.org.

Vessel registration and incident reporting

It is strongly recommended for all merchant ships transiting the Western Indian Ocean, the Somali Basin, the Gulf of Aden, Gulf of Oman and the Red Sea to register with UKMTO and the Maritime Security Centre Indian Ocean (MSCIO). Any incidents or suspicious activities should also be reported to UKMTO and MSCIO.

Contact details UKMTO

Email: watchkeepers@ukmto.org
Phone: +44 2393 222060
Website: www.ukmto.org

Contact details MSCIO

Email: postmaster@mscio.eu
Phone: +33 298 220 220 or +33 298 220 170
Website: www.mscio.eu

If a vessel is under attack, **US naval forces in Bahrain** are able to coordinate assistance.

Phone: +973 1785 3879
Email: m-ba-navcent-ncags@us.navy.mil

Combined Maritime Forces also recommend ignoring VHF calls by "Yemeni navy" with instructions to alter course to Hudaydah or other locations in Yemen. When merchant ships are contacted, masters are advised to continue the voyage and call for a coalition warship on VHF Channel 16, stating current location, situation and intentions.

In addition, vessel operators are advised to contact the respective flag state for additional guidance or requirements regarding incident reporting procedures.

Mitigation measures

Risk Intelligence strongly recommends merchant ship operators to assess whether the respective vessel has been owned or managed by Israel-affiliated companies in the past. Such information may not have been updated in publicly available databases and could lead to misidentification of current commercial links with Israel.

Prior to voyages through the Red Sea and the Gulf of Aden, ship operators should conduct a thorough ship and voyage-specific threat and risk assessment in line with shipping industry best practices. In addition, the following measures should be considered:

- Constant monitoring of the security situation, enabling vessels to avoid locations with recent or ongoing incidents.
- Introduction/update of contingency plans on the company level to address the possibility of seafarers being injured, killed or kidnapped during a security incident. The plan should include contingency and emergency plans; appropriate drills should be completed.
- Crew briefings and scenario drills based on a valid and relevant anti-attack plan to ensure that incidents are reported and alarm is raised without delay when required. Drills should include scenarios with major damage and casualties.
- Enhancement of firefighting, evacuation and damage control procedures, taking into account the possibility of significant damage as a result of direct targeting or collateral damage.
- Enhancement of medical equipment to deal with multiple casualties.
- Emergency contacts placed readily available on the bridge.
- Bridge team briefing regarding hailing/harassment via VHF, prepared responses and immediate contact with naval forces in the respective area. (Local authorities' calls on VHF may be an act of spoofing or even targeting, underlined by several incidents in recent days which involved self-proclaimed 'Yemeni authorities' or the 'Yemeni navy' ordering merchant ships to alter course.)
- Preparation of citadel with emergency provisions and functioning satellite phone.
- Depending on individual circumstances, embarkation of armed guards may be useful to mitigate specific risks, specifically in relation to the threat of boardings from small boats (e.g. Houthi forces, Somali piracy). However, the threat of direct targeting by missiles, aerial or naval drones used by Houthi forces in Yemen (southern Red Sea / Gulf of Aden) cannot be mitigated by embarkation of armed guards.

In general, existing BMP5 recommendations have been developed to deter piracy. While the guidance included in BMP5 is relevant to deter illegal boardings, it offers virtually no mitigation against current threats such as attacks by missiles, drones or – potentially – waterborne IEDs ('drone boats').

Ship operators should also consider developing adapted procedures for transits through the Red Sea and/or the Gulf of Aden. This guidance should consider specific scenarios (e.g. aerial or waterborne threats, hailing on VHF) and include actions by the crew to minimise the impact of any security incidents.

Red Sea – threat assessment (summary)

Following the incidents in the southern Red Sea and the Gulf of Aden related primarily to Houthi forces, there is now a significant threat to merchant ships linked to Israel through a variety of commercial relationships. Although threats will vary on a case-by-case basis, the overall threat level for these vessels is assessed as severe for vessels linked to Israel through ownership and severe for vessels linked through other commercial relationships, including port calls by other ships owned by the same company. Threats against merchant ships linked to the US and UK and other countries involved in direct military strikes against Houthi forces are also severe. The threat level for all other ships is elevated.

This reflects the escalation in violence since November 2023, which has progressively expanded the scope of vessels considered as "legitimate targets" by the Houthis. It is likely that the US and UK strikes are impacting the Houthis' missile launch capabilities, though the extent is impossible to assess. Since mid-2024, the frequency of Houthi strikes has decreased. It is likely that Houthi strikes will become more separated in time and more reactive to regional events, such as the war in Lebanon. The Houthis have likewise tied the cessation of their maritime campaign to the end of the wars in Lebanon and Gaza. The 26 November 2024 ceasefire in Lebanon between Israel and Hezbollah is not expected to immediately impact the Red Sea campaign or the threat level in the region.

Naval vessels have intercepted a number of drones and missiles intended for Israeli targets, or against the naval ships themselves. The Houthis have also threatened to strike ships in the Mediterranean and in the Indian Ocean, even if they are transiting around the Cape of Good Hope. It is very unlikely, however, that Houthi forces are able to conduct such strikes autonomously.

The situation is evolving as the list of publicly announced targets has expanded over time. While the threat level to vessels which are directly owned by Israeli companies is assessed as even higher, it should be noted that virtually no such vessels are currently transiting the Red Sea. What the Houthis consider to constitute a link strong enough to warrant a strike is variable and an internal decision. They have conducted strikes against vessels with aerial and naval drones, missiles of different types and occasionally personnel aboard skiffs.

It is also important to highlight the threat of collateral damage, particularly in the southern Red Sea with still dense maritime traffic. It is very likely that Houthi forces have missed their intended targets on several occasions, increasing the potential for unintended strikes against other merchant ships. Moreover, this is a highly dynamic and evolving threat which must be monitored closely in light of ongoing incidents.

Maritime security in the southern Red Sea is also affected by the conflict in Yemen as some fighting between the Houthis and the rival government supported by the Saudi-led coalition continues. The maritime dimension to this conflict is limited. Ceasefire talks in 2022 saw a substantial fall in cross-border attacks in Saudi Arabia, as well as an improved threat environment during transits through the Bab el Mandeb. Attacks have not taken place since, likely due to ongoing in negotiations between the Houthis and the Saudi-led coalition.

Both sides are unlikely to jeopardise a potential deal. The threat level for direct attacks against port and oil facilities in Saudi Arabia and the UAE is therefore lower while talks continue. In addition, Saudi Arabia has so far refrained from criticising the Houthis during their current campaign which is a significant difference from Saudi announcements about alleged interceptions of waterborne drones off Saudi port facilities in the past.

There is a dispute between Yemen and Eritrea in the Hanish Islands area, primarily due to fishing. In an incident in June 2021, there was a clash between coastguard/naval forces. In August 2021, several fishing vessels and three Yemeni crew were detained by the Eritrean coastguard near the Hanish Islands. Due to the irregular nature of Yemeni coastguard forces, or the difficulty in identifying Eritrean craft (which are small speedboats), there are problems with merchant vessels misidentifying small patrol craft from Yemen and Eritrea as pirate vessels.

Aggressive enforcement by coastguard vessels, or local craft attempting to warn away merchant vessels, are possible threats in the area. The piracy threat is minimal, even in southern areas, as this area is now considered to be outside the operational range of Somali pirates. The fighting in Sudan is not expected to affect threat levels in the Red Sea.

Threat levels

Refer to the section "Methodology / Definitions" for a definition of threat levels. A concise assessment of all threats listed in the table can be found on the Risk Intelligence System.

Threat type	Threat level
Terrorism	Moderate
Piracy	Low
Insurgency and Military Operations	High
Cargo Theft	Moderate
Smuggling	Elevated
Stowaways and human trafficking	Low
Fraud and corruption	Low
Activism	Low

Indian Ocean – threat assessment (summary)

This area covers the western Indian Ocean (north of Madagascar, east towards India), including the Somali Basin, Gulf of Aden, and western Arabian Sea. Houthi operations targeting merchant ships in transit can take place in the western Gulf of Aden where threat levels are similar to the southern Red Sea. In the Indian Ocean, there is an elevated threat of piracy off Somalia and a moderate to elevated drone threat to merchant ships in the Somali Basin, Gulf of Oman and the Arabian Sea.

There is still a potential for pirate operations in the Somali Basin and the Gulf of Aden, the threat is elevated. Recent cases show that pirates retain boarding capabilities at significant distances offshore, as far as 800 nautical miles from Somalia. The hijacked ABDULLAH was released on 14 April 2024 after a claimed $5 million ransom was paid. The successful ransom has demonstrated that the piracy model still functions and that pirates can hold ships off the Somali coast to receive ransom payments.

Pirate activity declined in mid-2024, with monsoon weather a contributing factor for operations far offshore. Nevertheless, pirate activity has been reported infrequently in recent months. The threat trend is downward.

There have been several reported boardings of fishing dhows off Somalia since November 2023. The level of activity has varied through 2024. These boardings were likely linked to illegal fishing activity in the area, which is an ongoing issue and has been a focus for Somalia in expanding its maritime enforcement capabilities.

In general, merchant ships in transit should be aware of the potential to encounter small armed craft in this area, particularly the Gulf of Aden. These might be fishermen, traders, smugglers, militia or irregular military forces, or military or coastguard patrols operating out of southern Yemen or northern Somalia.

The Houthis have announced their intentions to target merchant ships also in the Indian Ocean. These intentions have been in some cases communicated directly to operators from the so-called Humanitarian Operations Coordination Centre (HOCC). However, Houthi capabilities to target ships at such distances are highly limited without outside assistance. Nonetheless, there have been three drone attacks in proximity to vessels in the eastern Gulf of Aden. The threat is generally assessed to be moderate in this area, as the main area of Houthi operations remains the Red Sea and western Gulf of Aden but is elevated for vessels that have been specifically named as targets by the Houthis.

In Yemen, multiple political factions operate their own militias in addition to security forces from Saudi Arabia and the UAE. Terrorist groups have a limited presence. There have been no recent incidents, aside from those linked to Houthi operations. The general situation in Yemen is primarily a consideration for operations close to the Yemeni coast or for port calls in the country.

Naval patrols operate in the area, such as EUNAVFOR's Operation Atalanta. Naval mandates include maritime crimes (such as drugs and arms smuggling) as well as countering piracy. The

group transit scheme for the Gulf of Aden is still operational. National deployments are also ongoing, such as the Indian naval presence which has been effective in recent actions.

Shipping industry associations have published transit guidance for the Gulf of Aden and the Red Sea, emphasising the importance of thorough ship and voyage-specific threat and risk assessments before passing through the area. UKMTO operates the Voluntary Reporting Area for the Indian Ocean, specifically the Red Sea, Gulf of Aden, and Arabian Sea, administered by the Maritime Trade Information Centre (MTIC)/UKMTO (Dubai). UKMTO acts as primary point of contact for merchant vessels and liaison with military forces in the region. Merchant vessels are encouraged to report positions while operating in the area.

MSCHOA manages the EUNAVFOR (EU Naval Forces Somalia and Operation Atalanta) voluntary registration scheme for ships transiting the area and communicates EUNAVFOR counter-piracy guidance to the maritime industry.
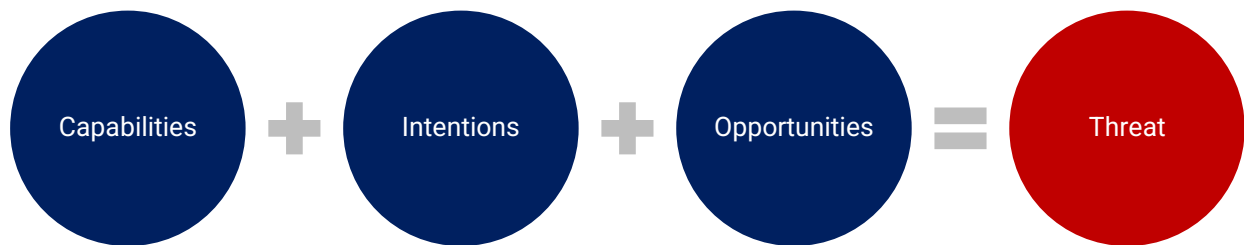
Threat levels

Refer to the section "Methodology / Definitions" for a definition of threat levels. A concise assessment of all threats listed in the table can be found on the Risk Intelligence System.

Threat type	Threat level
Terrorism	Moderate
Piracy	Elevated
Insurgency and Military Operations	Moderate
Cargo Theft	Low
Smuggling	Moderate
Stowaways and human trafficking	Low
Fraud and corruption	Low
Activism	Low

Methodology / Definitions

All threat levels are based on the likelihood of a threat type occurring, with generic consequences described in the relevant sections. All threat levels are based on an assessment of capabilities, intentions and opportunities of potential perpetrators, separated into different categories.

Maritime operators are typically unable to lower the threat level by influencing the underlying variables. However, all variables are subject to change over time, e.g. changes in the intentions or capabilities of potential perpetrators. They should therefore be re-assessed as required.

In an additional step, the threat levels assessed here can be used to identify the risk level for a particular type of operations. Determining the risk level also requires an assessment of the vulnerability and the potential consequence of a particular incident. Appropriate mitigation measures can then be implemented to lower the risk level.

Threat levels

All threat levels mentioned above are assessed based on the likelihood and consequence of a particular threat type occurring. The levels are:

- Low: Not expected in the operational area or in proximity.
- Moderate: Not expected in the operational area but possible in proximity.
- Elevated: Possible in the operational area or in proximity.
- High: Expected in the operational area or in proximity.
- Severe: Commonplace in the operational area or in proximity.