RiskIntelligence

Security Threat Update:
Red Sea / Gulf of Aden
12 March 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: 12 March 2025, 08:00 UTC.

Recent incidents (Red Sea / Gulf of Aden)

No incidents which have directly affected merchant ships in the southern Red Sea, the Bab el Mandeb or the Gulf of Aden have been recorded on the Risk Intelligence System during the past 30 days.

Comprehensive descriptions for 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.

Current situation

**On Wednesday 12 March 2025, the Houthis threatened to restart targeting
sailing through the Bab el Mandeb, officially in support of Gaza, where the entry of aid has been
suspended by Israel.** **new terms for the
ceasefire.**

**, and it is
uncertain whether the Houthis have expanded their definition to include vessels which would
not have been struck prior to yesterday. The ambiguity is highly likely voluntary so that the
. It is possible that the Houthis not take action, and that the
announce serve a domestic political purpose. It is possible, but less likely, that they conduct a
strike in the short to medium term.**

US forces have carried out military strikes against targets in Houthi-controlled areas of Yemen
between January 2024 and January 2025, both unilaterally and as joint strikes with the UK
military, supported by several other countries. The overall rate of these strikes has been limited
with spikes caused by retaliatory cycles of violence between the Houthis and Israel. These
attacks have ceased since the announcement of the Houthi ceasefire on 19 January 2025.

US-coordinated offensive military actions have been conducted under Operation Poseidon
Archer. For political reasons, these had to be 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. Some attacks during the early stages of the campaign
apparently relied on outdated information about individual ships. No such incidents have been
reported since Q2/2024. Overall, Houthi attacks against merchant ships have not been
'indiscr ioften claimed by theUS and other Western governments.

Red Sea campaign's status

On 12 March 2025, the Houthis announced vessets heat s" t
transiting in the Red Sea. They did not define what new criteria they would use to define Israeli
vessels. Indeed, upon suspending their campaign on 19 January 2025, the Houthis had
announced that their "ban" on Israeli It is uncertain which new vessels conti
are encompassed by this renewed threat.

It is possible that the Houthis will not act upon their new threat in the short to medium term, as it
only serves a domestic political purpose. It is possible, but less likely, that they will act upon their
threat, but in a limited manner, with a single vessel strike, or attacks on Israeli territory. A genuine
resumption of the campaign is unlikely. Interested readers will find the assessment explained in
depth below.

Houthi logic

The Houthis had set an ultimatum to Israel, giving it 4 days to resume the entry of aid into Gaza following Israel's decision to susp the hours before deli writing this report, causing the Houthis to issue the new threat.

This report previously stated that the Houthis are not currently assessed to have an intention to renew the attacks, and the assessment so far has held. It may evidently be proven wrong by a single attack, but there are no strong incentives to resume strikes (and few targets). The cessation of Western bombardments, as well as the successful outcome of their year-long campaign, means their political goals have been achieved. Their political goals were to legitimise their rule of Northern Yemen, and gain support among constituencies in the Arab world, increasing their acceptance as a state, and no longer as "mere" insurgents

The ambiguity in the Houthi threat made on Wednesday 12 March serves that purpose. It rhetorically complies with their promise to resume violence should the Gaza ceasefire collapse, yet gives the Houthis wiggle room to not resume the strikes, by claiming that their threats have simply scared off Israeli vessels (or even claiming untrue strikes). If aid returns to Gaza, Houthis can likewise claim that they again succeeded in cowing the West. Indeed, renewed strikes would provoke a Western retaliation, whereas the decrease in the Israeli operational tempo also means Israel is likely to have more assets available to strike Yemen. The Israelis' particular understanding of proportionality in its retaliations remains a deterrent to resuming strikes against their interests.

Furthermore, given the ballet around Iranian-US nuclear talks, the Iranians will likely seek to keep tensions manageable by encouraging their ally to limit their attacks. This adds a tempering factor to the threat, lasting while the Iranians assess talks with the US are possible or of some use to them and their policy goals, including rebuilding the Axis of Resistance.

Ceasefire in Gaza holds despite violations, talks resume in Doha

Below is the status of the Gaza ceasefire. This is not an exhaustive description, and all aspects are subject to political and technical obstacles.

> First phase of the ceasefire expired on 1 March 2025. The ceasefire is holding with numerous violations reported.
> Israel has suspended aid delivery to Gaza in order to compel Hamas to accept a continuation of the ceasefire on Israeli terms.
> Negotiations have resumed in Doha in recent days, with some progress reported.

Gaza is in a limbo. The ceasefire has expired, but has not totally suspended. Israeli troops have not withdrawn and fighting continues sporadically in the strip. The next steps are unclear, but depend on Israeli and US politics.

The Israeli government has sought to renew a ceasefire on its terms, meaning without the perspective of a political settlement to end the fighting, and reneging on several aspects of the first ceasefire agreement. To compel Hamas to accept this change, it has suspended aid delivery, prompting renewed fears of humanitarian consequences on the Gazan population.

The Netanyahu government has delayed the withdrawal of Israeli troops from the Gaza strip, claiming concern for the assessed 59 Israeli hostages remaining (both alive and dead) in Gaza. Hamas remains faced with the dilemma, previously discussed, of losing its leverage if it does actually release the remaining hostages. Hamas has little expectation that Israel will keep its word on withdrawing totally from Gaza, and has little reason to expect that Western powers will seek to compel Israel to abide by any agreement.

Likewise, Israel has little reason to expect Hamas to disarm or dissolve if it withdraws from Gaza, and little reason to believe that any external entity will be able to ensure that the armed group does not rebuild its forces and again pose a threat to its security or population.

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.

The threat level towards vessels linked to Operation Poseidon Archer – shown in the table below – reflects the uncertainty about the peace proces ceasefire agreements, as well as restraint shown by all belligerents during the past weeks.

Though there have been no attacks in over two months by the Houthis, this is not indicative of a continued commitment to stop the attacks. The cessation in strikes is first and foremost dependent on the progress of the situation in Gaza, and the Houthis' politic

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	High
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 high threat level for merchant ships linked to the US and the UK through ownership. Based on Houthi announcements, the group will continue targeting vessels which are owned by companies that are trading with Israel, meaning a continued severe threat level for these ships.

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 e s 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. 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). This week has seen a slight increase in traffic through t h e   B a b   e l   M a n d e b ,   t h o u g h   i t   s t i l l   i s   w i t h i n   t h e
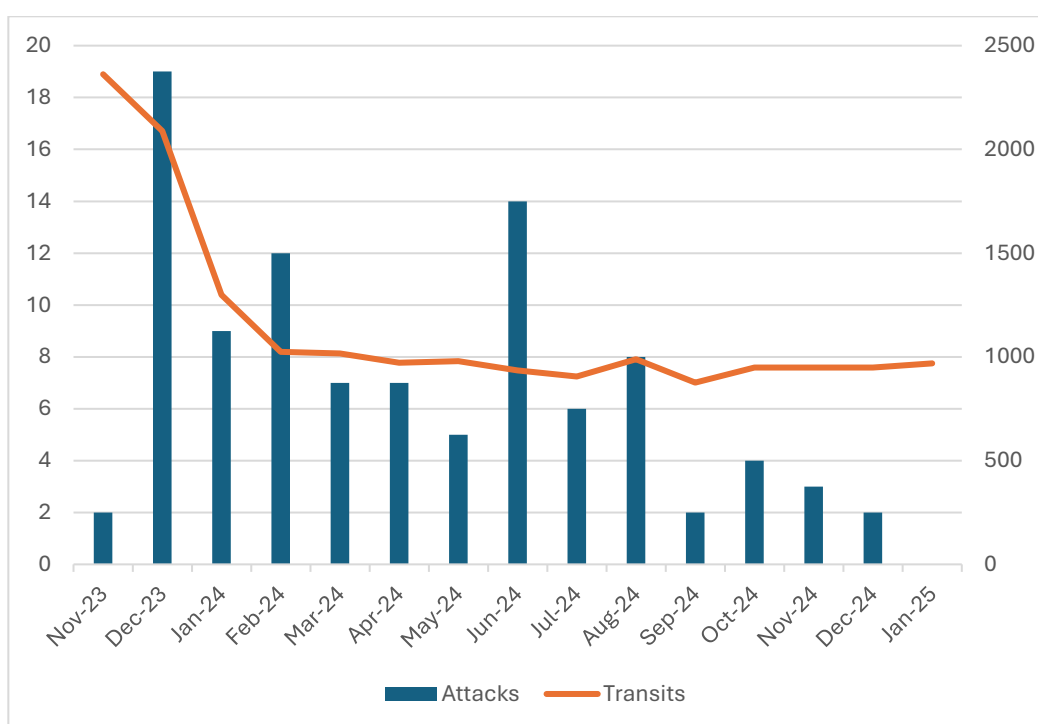
Figure 1: Attacks against merchant ships per month (blue columns) and number of monthly Bab el Mandeb transits by merchant ships >10,000 dwt (red line) (Source: Risk Intelligence System / L l o y d ' s List Intelligence/Seasearcher)

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 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.

It is unlikely that maritime traffic will decrease further. 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.

Figure 2 below indicates that the industry is still adopting it wait and see attitude, as uncertainty about the

Figure 2: Suez Transits Year on Year comparison, indicating a sustained decrease to the new normal, even with several months without a t t a c k s   b y   t h e   H o u t h i s .   (S *Intelligence/Seasearcher)*
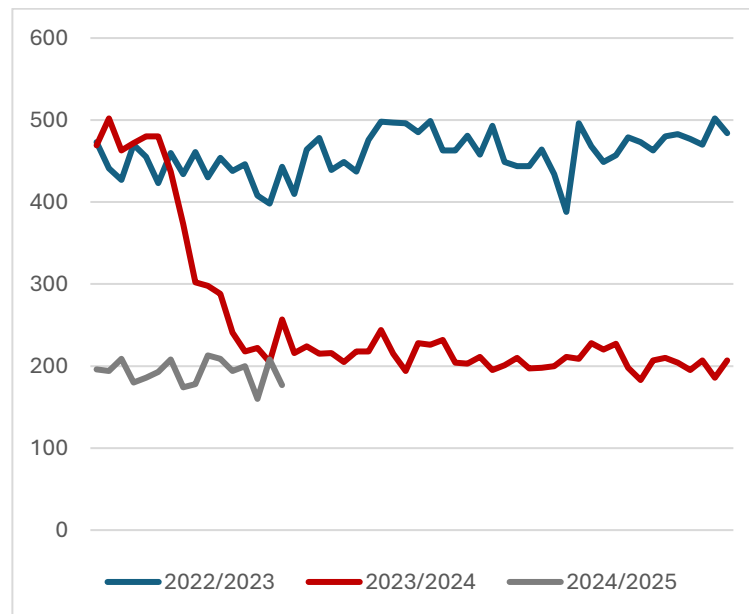
Ongoing military missions have not lowered the threat level for commercial shipping substantively. For transits through the Gulf of Aden and the Red Sea, it should be noted that naval recommendations to switch off AIS are not based on credible figures. Both the EU-led and the US-led military operations 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. Raw data used for the analysis has not been made public. The results are therefore at least questionable, underlined by misleading 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 during the Houthi campaign.

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)

On 19 January 2025 the Houthis have announced a pause in their Red Sea campaign, positively acknowledging the ceasefire deal in Gaza. In their announcement, the Houthis stated that trade through the Red Sea would re-open for all categories except Israeli-flagged vessels or vessels directly owned by Israeli entities. The campaign's pause is largely contingent on the Houthis' perception of Israel's behaviour in the upcoming days and weeks, as well as the political benefit Houthis expect to gain from exploiting the Gaza crisis. There have been no maritime attacks since before the cessation of the campaign was announced on 19 January 2025. This has been the case despite numerous allegations of ceasefire violations by Israel, indicating that the Houthis currently have little intention of resuming maritime strikes.

On 12 March 2025, the Houthis threatened to resu Sea, whereas these were already "blais undelr"which nder new vessels are encompassed by the threat, and the Houthis have rhetorically allowed themselves the space not to attack. It is uncertain that the Houthis will strike vessels in the short to medium term under the current circumstances. It is possible that a Houthi strike, if it should materialise, take place against Israeli soil

Overall, while the conditions for a return of shipping have begun to appear, there is still some way to go before a return to the pre-campaign normal. The shipping industry must be convinced that the current lull in attacks is not just temporary. The Houthis, Israel and Hamas must exercise restraint long enough for this to happen, and political considerations in Yemen must favour a continued cessation of Houthi strikes at sea. None of these conditions will be easily met, and the latest progress may easily be inverted, particularly given political pressure in Israel to resume the fighting in Gaza.

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 departure 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 drone threat to merchant ships in the Somali Basin, Gulf of Oman and the Arabian Sea.

The drone threat is now reduced to moderate following the Houthi announcement on 19 January that trade through the Red Sea and the Gulf of Aden would re-open for all categories except Israeli-flagged vessels or vessels directly owned by Israeli entities. This pause in the wider Houthi campaign is largely contingent on the Houthis' perception of Israel's behaviour in the upcoming days and weeks, however, so there is potential for the threat to be revised upwards should there be a change in that perception.

The threat of pirate operations in the Somali Basin and the Gulf of Aden is elevated. Recent cases show that pirates retain boarding capabilities at significant distances offshore, as far as 800 nautical miles from Somalia. The hijacked bulk carrier 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. A second ransom, reportedly $2 million, was secured following the hijacking of the Chinese fishing trawler LIAO DONG YU 578 in November 2024.

Pirate activity declined in mid-2024, with monsoon weather likely a contributing factor as it made operations far offshore more difficult. Nevertheless, since then, pirate activity has been reported infrequently in recent months. This might be due to a perception by the pirates that the risk vs reward calculation for targeting merchant vessels has changed. As such, the threat trend is downward.

There have been several reported boardings of fishing dhows off Somalia since November 2023, which continued 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. The LIAO DONG YU 578 hijacking suggests that illegal fishing is more of a motivating factor for piracy actions than targeting merchant vessels. The successful ransom for the LIAO DONG YU 578 will likely motivate similar operations.

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. Such craft might manoeuvre close to merchant ships while not presenting a threat.

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 operation of such forces in Yemen is primarily a consideration for operations close to the Yemeni coast or for port calls in the country where local political disputes might include limited actions against merchant ships.

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 (now renamed as Maritime Security Centre Indian Ocean, MSCIO) 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.
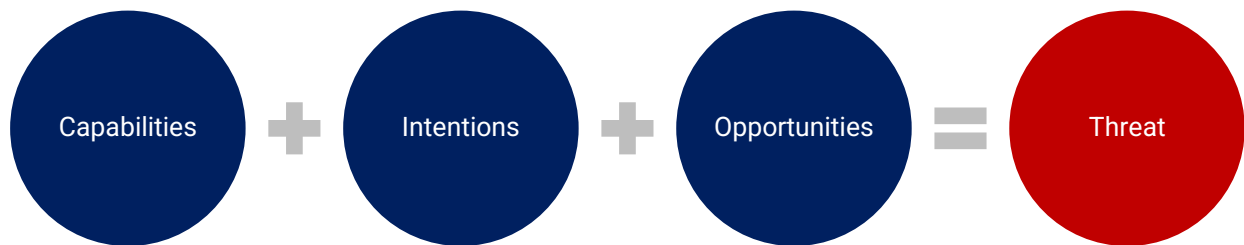
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Methodology / Definitions

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.