



RiskIntelligence

Monthly Intelligence Report

May 2025

Risk Intelligence A/S
Strandvejen 100
2900 Hellerup
Denmark

Tel: +45 7026 6230
info@riskintelligence.eu
www.riskintelligence.eu

Table of contents

Monthly focus:	4
Irregular migration in the Mediterranean	4
Background.....	4
Migration routes and figures	5
Potential impact on shipping.....	7
Update: Maritime dimensions of the war in Ukraine	8
Situation on land.....	8
Black Sea situation.....	9
Summary and forecast.....	10
West Africa	12
Incidents	12
Assessment	13
Inner Gulf of Guinea (Togo to Cameroon)	13
Outer Gulf of Guinea (Côte d'Ivoire to Gabon)	15
Western Indian Ocean	16
Incidents	16
Assessment	17
Southern Red Sea – Gulf of Aden.....	17
Gulf of Oman – Persian Gulf.....	18
Somali Basin and wider Indian Ocean.....	19
South East Asia	21
Incidents	21
Assessment	22
Straits of Malacca and Singapore, South China Sea, Indonesian archipelago, Sulu / Celebes Seas	22
Definitions	27
Threat levels	27
Incident types	27

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.

Advice given and recommendations made do not constitute a warranty of future results by Risk Intelligence or an assurance against risk. Recommendations made are based on information available at the time of writing. No express or implied warranty is given in respect of any judgment made or to changes or any unforeseen escalation of any factors affecting any such judgement.

Documents are for the benefit of the client only and may not be disclosed to any third parties without the prior written consent of Risk Intelligence; such consent not to be withheld unreasonably. The client agrees to indemnify Risk Intelligence against any claims and any resulting damages that may be caused by any unauthorised disclosure of such documents.

Monthly focus:

Irregular migration in the Mediterranean

Background

As the summer season returns, the seasonal pattern of increased numbers of migrants crossing the Mediterranean to get to Europe has government authorities and private companies worried. Much has been said about the threat of migration to commercial shipping. Despite the extreme politicisation of the topic within Europe, however, little has changed in recent years.

Typically, migrants from across Africa and Asia gather along the North African coasts before seeking to reach Europe aboard a broad variety of vessels. These are often unseaworthy and cramped, provided by human trafficking networks.

Sea routes used by migrants pass through busy shipping lanes, potentially impacting merchant ships in transit. Seafarers are often called upon to assist in safety of life at sea (SOLAS, from the 1974 Convention of the same name) operations, presenting specific challenges to the crews on those ships.

Southern European countries are the most affected destinations. The use of the Mediterranean as a gateway into Europe continues to be a contentious political issue within virtually all European countries. A lack of unified solutions and continued instability in the Middle East and Africa means that migrants will continue using these sea routes in large numbers, regardless of repressive policies implemented on both sides of the Mediterranean.



Rescue operation for migrants on an overcrowded rubber boat around 34 nautical miles off Libya (Source: Anthony Jean / SOS Mediterranee)

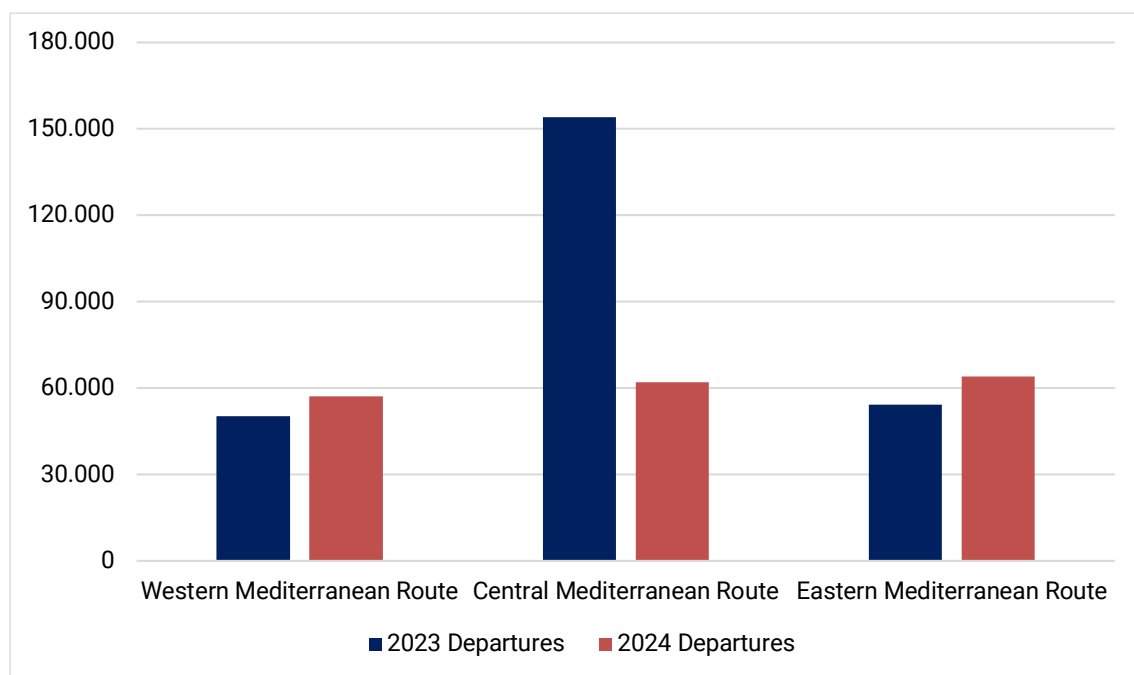
Migration routes and figures

Irregular migration often uses well-established routes. These routes will be quickly adapted in case of political and economic changes in the origin, transit, and destination countries. The most important migratory routes leading to Europe are the Atlantic route, the western Mediterranean route, the central Mediterranean route, the eastern Mediterranean route, and the Balkan route on land. This article focuses on the routes crossing the Mediterranean.

The central Mediterranean route remains the most active (and dangerous) route to Europe for migrants. Instability in Tunisia, where government mismanagement and foreign meddling have significantly worsened economic perspectives, led to a surge in departures from the country in 2023, which politicians claimed to have mitigated in 2024.

Numbers for 2024 show around 62,000 detected crossings, a 59% decrease compared to the previous year as well as a rise in claimed interceptions by the Tunisian coastguard. However, there are significant doubts about these official numbers.

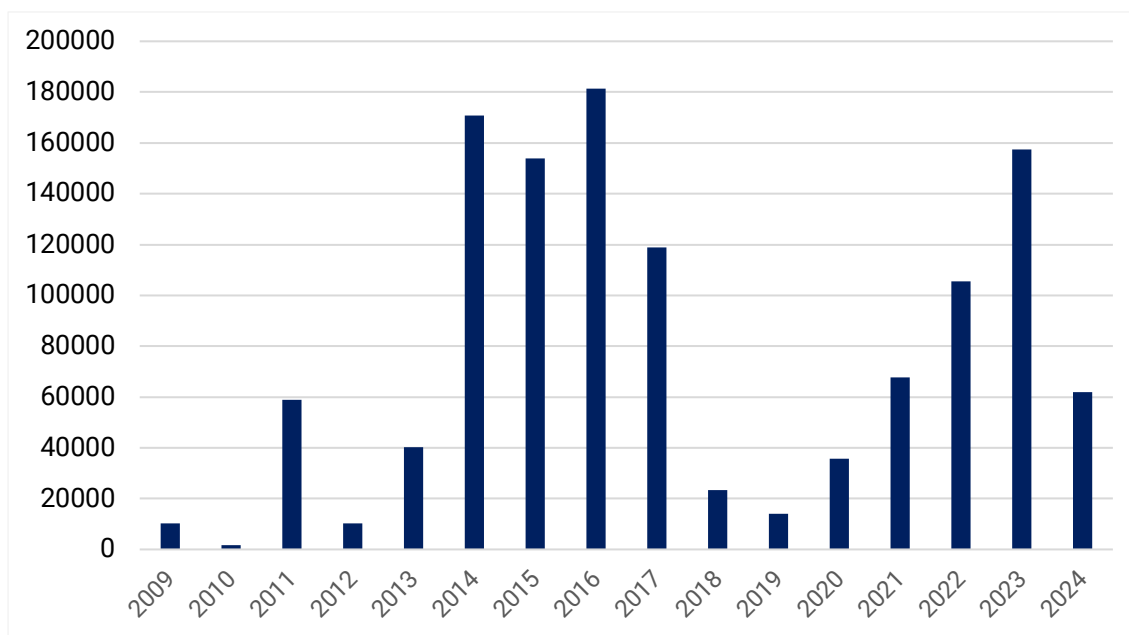
Simultaneously, the western Mediterranean route, covering departures from Morocco and western Algeria towards Europe, has experienced a growth in the number of arrivals, particularly from Mauritania. According to Frontex, around 42,000 migrants arrived to the Canary Islands in 2024 (19% more than in 2023 and a total growth of 14% on combined western routes).



Migrant departures in 2023 and 2024 (Source: Frontex)

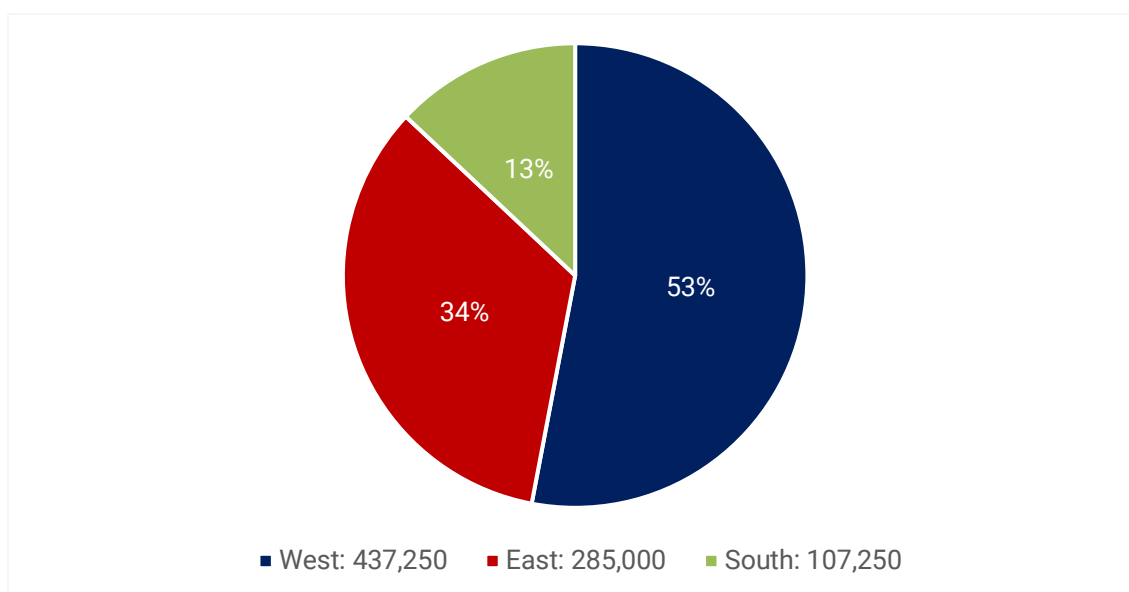
Around 68,000 migrants arrived in Europe via the eastern Mediterranean route (18% increase from 2023). This confirms the traditional pattern of growth along one route when authorities clamp down on another, although the situation appears to have been stabilised for this year.

While the western and eastern routes pose less of a challenge to shipping, they still expose crew and vessels to SOLAS incidents and may impose significant delays to operations.



Number of illegal border crossings on the central Mediterranean route between 2009 and 2024 (Source: Statista, Frontex)

An estimated 825,000 migrants are currently present in Libya, roughly 175,000 more than two years ago. These migrants are waiting for their chance to cross the Mediterranean and reach Europe.



Migrant distribution in Libya (Source: International Organization for Migration)

The majority of migrants in Libya are sub-Saharan Africans, but there are solid North African contingents, especially from Egypt. In addition, there is a significant presence of people from the Indian subcontinent. Tunisia has likewise regained its place as a prominent country of departure towards Italy.

In 2023, over 154,000 migrants reached Italy via the sea, close to the 2016 peak of around 180,000 arrivals, underscoring the intensity of traffic and the failure of previous initiatives. The externalisation of European border control, led by Italy's far-right prime minister Giorgia Meloni, has led to some claimed successes. However, it is too early to definitively attribute a decrease in numbers to externalisation policies.

Overall data suggests that migrant flows are independent of efforts by European or African states to control population movements. Repressive measures may stem the tide for a certain period but migrant flows ultimately evolve independently of governments' wishes. Interceptions rise and fall with the tide of migrant departure numbers.

Whether the externalisation policies can hold under domestic pressures in southern Mediterranean countries is another matter. The political price to pay for such policies is high and poses significant social risks to the more fragile countries.

Potential impact on shipping

The overall impact of irregular migration on commercial shipping in the Mediterranean is hard to quantify. While the majority of ship will not be involved in encounters with migrant vessels, individual cases can have significant implications. Political complexities, for example, could delay the disembarkation of rescued migrants, creating a knock-on impact on the respective ships and crews.

By and large, it is very likely that the shipping sector will remain vulnerable to upheavals throughout the African continent as these may lead to increased numbers of migrants. The sheer number of migrants currently located in Libya underlines the potential pressure on migrant routes across the Mediterranean. As the situation may change on short notice, operators should monitor ongoing developments and maintain a high degree of situational awareness.

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

Diplomatic activity increased during April, including two new announcements of ceasefires and ceasefire proposals by Russia, following previous proposals by Ukraine and the United States. Russia announced a ceasefire to coincide with the Orthodox Easter on 20 April. Although there were reports of fewer attacks, especially fewer missile and drone attacks, by Russian forces in Ukraine, there were still a significant number of ceasefire violations. Ukrainian forces retaliated, undermining any actual ceasefire, regardless of the announcement by Russia.

The ceasefire announced by Russia during the Orthodox Easter was announced too late to have any real effect. It was the third announced ceasefire which did not live up to its purpose. The first was a 30-day ceasefire proposed by the US earlier this year, which Ukraine agreed to while Russia did not. It was followed by the Black Sea ceasefire proposal in March, which Russia was keener on, but this never materialised either.

While there have been so far no reports of Russian attacks damaging Ukrainian port infrastructure or vessels in port since early March, such attacks remain probable as Russia still has the capability to undertake targeted strikes.



Ukrainian president Volodymyr Zelenskyy meeting US President Donald Trump at the Vatican in April 2025 (Photo: Ukraine Presidential Office)

Military developments during April, with reports of Russian forces making incremental gains, have not significantly changed the overall outlook of the Russian offensive campaign in Ukraine or Ukrainian defensive operations. However, there were some further reports of Russian forces

retaking the Kursk Oblast in Russia, forcing a possible Ukrainian retreat. Russian forces also continued to target Ukrainian energy and other civilian infrastructure.

Risk Intelligence also offers a weekly report which provides 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 security picture varies. Impacts or disruptions caused by military operations are most likely in the northwestern part. Military operations remain likely 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 included attacks against Russian and Ukrainian port infrastructure and port cities.

Incidents have also been reported at Ukrainian Danube ports. 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 merchant ships were apparently deliberately targeted on some occasions in the past. 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 subject to Russian missile and drone attacks.

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. Ukrainian forces are reported to continuously patrol Ukrainian waters as part of mine countermeasures to mitigate the threat from drifting mines to ships transiting to participating ports of the Ukrainian Black Sea corridor. Romanian, Bulgarian and Turkish forces are operating similar countermeasures in their waters as part of a tri-party agreement. Based on the number of vessel transits, both in the Ukrainian Black Sea corridor and the general Black Sea, and the reported number of mine-related incidents, the threat level in relation to mines is moderate.

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 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 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 expected local operational differences and issues.

Incidents involving merchant ships were reported in 2024 and 2025, underlining that Russia is prepared to deliberately target commercial ships en route to or from Ukraine in specific cases. Russia has previously announced that any ships travelling to Ukraine's Black Sea ports will be viewed as possibly carrying military cargo, and such unsubstantiated claims have been made by

Russia, seemingly to justify the attacks. Similar incidents remain possible. Furthermore, Russia has not withdrawn the prohibition of navigation north of 45-21N, 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, although it is less likely that Ukraine would deliberately and overtly target merchant vessels.

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 coastal countries, although these are not known to directly target the maritime sector. Irregular migration crossing the Black Sea is a lesser threat than for the Mediterranean. However, a small number of migrants have previously been intercepted attempting to cross the Black Sea, often trying to reach Bulgaria or Romania. It is unlikely that the threat level will increase under current circumstances.

Summary and forecast

The flurry of diplomatic activity and engagement in April was largely due to the US administration aiming at obtaining some form of settlement or ceasefire, permanent or otherwise, before 29 April which marked President Trump's first 100 days in office. However, despite the increase in focus and engagement by the US, Trump and his team have not been able to establish common ground on which both Ukraine and Russia could begin negotiations.



Ukrainian president Volodymyr Zelenskyy during a visit to South Africa in April 2025 (Photo: Ukraine Presidential Office)

This led to the Trump administration stating that if a mutual basis for negotiations was not established soon, the US would withdraw its efforts. The statement was likely intended to put pressure on the parties before 29 April. Overall, the Trump administration is unlikely to risk being seen as having failed in their efforts and unable to be a force for peace between the warring parties.

The Easter ceasefire announced by Russia was generally considered largely symbolic, as is the upcoming three-day ceasefire to coincide with the annual Russian Victory Day celebrations from 8 to 11 May. Ceasefires generally require prior negotiations to establish what they include. At the moment, there are no known negotiations taking place about what the ceasefire will cover or not.

Diplomatic and political efforts are likely to continue in May, the present situation and the resulting threat picture are also likely to continue. Although there were no attacks against ports in April, future attacks cannot be ruled out. The intensity and focus of attacks will vary, and Russian forces are likely to continue to target Ukrainian infrastructure and to attempt to occupy greater areas of Ukraine.

The ability of Russia to threaten and successfully attack Ukrainian energy infrastructure remains dependent on Ukrainian capabilities to protect these facilities. The effectiveness of Ukrainian military operations will remain dependent on its ability to maintain its own arms production and the ongoing support from its partners.

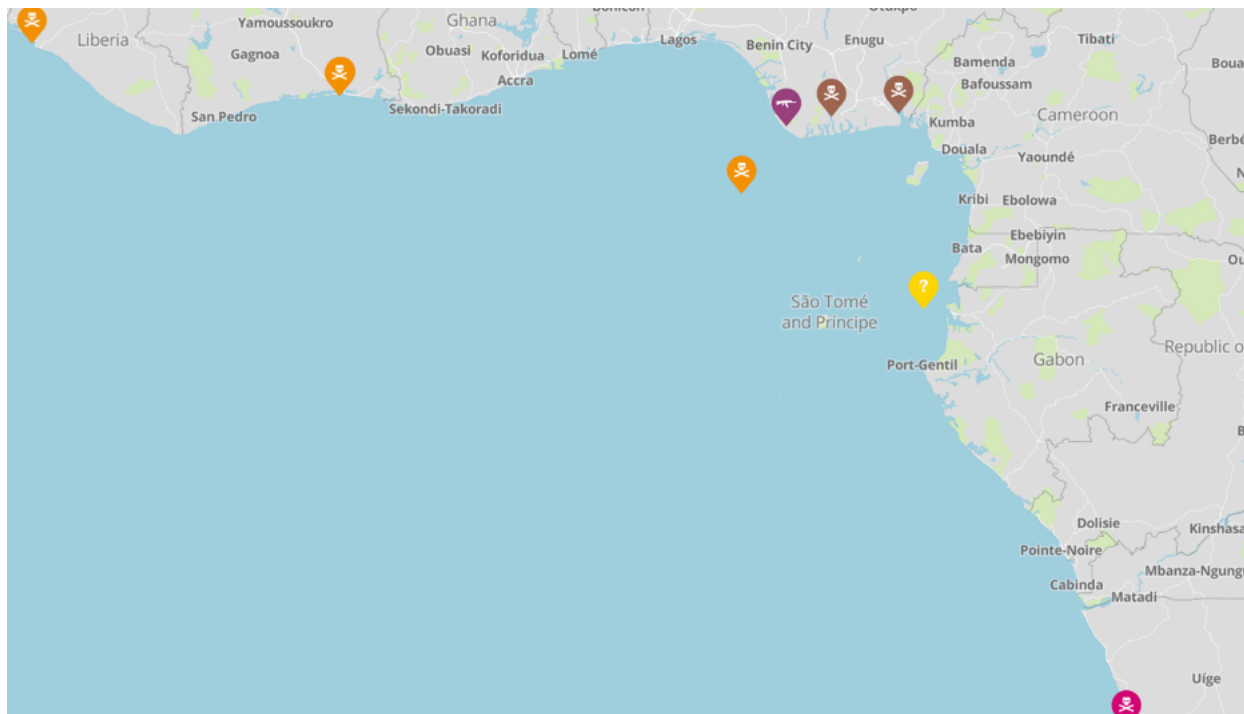
Further information

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 30 April 2025, shown on the map below. Further incident details are available on the Risk Intelligence System.



Incidents

3 April – Merchant ship boarded

Theft, Luanda anchorage (Angola)

4 April – Local passenger craft attacked

Kidnap/ransom, Near Port Harcourt, Rivers state (Nigeria)

8 April – Container ship GH MAESTRO boarded

Failed theft, Abidjan anchorage (Côte d'Ivoire)

11 April – Patrol boat attacked

Insurgency, Koluama Creek, Bayelsa state (Nigeria)

14 April – Product tanker TORM ALEXANDRA boarded

Failed theft, Monrovia anchorage (Liberia)

21 April – Product tanker SEA PANTHER boarded underway

Failed kidnap/ransom, 113 nm south-west of Brass (Nigeria)

23 April – Container ship KOTA CARUM approached

Failed theft, Abidjan anchorage (Côte d'Ivoire)

Assessment

Inner Gulf of Guinea (Togo to Cameroon)

Attackers operating off the southern and eastern Niger Delta remain the most significant potential threat for merchant ships in international trade operating in the inner Gulf of Guinea. The boarding of a product tanker about 100 nautical miles off the Niger Delta coastline underlined the threat. However, the incident involved a ship that was solely trading in the region. At the time of the attack, the tanker was en route from Lome (Togo) to Douala (Cameroon). The overall circumstances suggest that this case was likely connected to other illicit maritime activities and that the ship was not targeted at random.

Several other attacks had previously been reported in the past twelve months, including several incidents between December and March. Most recently, ten crew members were kidnapped from a bitumen tanker off Equatorial Guinea in March. Similar to the incident described above, it is very likely that most recent incidents have been closely linked to other illicit activities at sea. Piracy should therefore not be analysed in isolation as the threat level for merchant ships is heavily influenced by such activities.

Attacks against local vessels in or near the Niger Delta frequently highlight the fragile security situation in this part of Nigeria, underlined by several cases in April. Such attacks are also often linked to other criminal operations, namely to oil-related crimes, or to conflicts between oil companies and local communities.



Nigerian military personnel inspect a destroyed illegal refining site in Rivers state (Photo: Nigerian Ministry of Defence)

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 across the Gulf of Guinea as organised criminal groups

have concentrated on these much more profitable operations. Virtually all high-profile pirate attacks in the past have been carried out by Niger Delta-based groups.

Nigerian security agencies carry out frequent operations to limit crude oil theft. In April, the military once again announced the destruction of dozens of illegal refining sites in several Niger Delta states. In addition, various boats transporting stolen crude oil and illegally refined oil products were seized. These efforts are part of Operation Delta Sanity which started in January 2024. Similar military operations in recent years have not led to sustainable improvements of the situation which only has a limited effect on neighbouring countries.

Overall, the security situation in the Niger Delta remains fragile. Initiatives to combat crude oil theft and illegal refining are likely to remain largely window-dressing. 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 dry season between October and March also 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 Maritime Security* 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 across the inner Gulf of Guinea, underlined by several recent incidents. Pirate attacks are possible at distances of up to 250 nm from the coastline, particularly during spells of good weather in the current rainy season which is set to last until September. All ship types may be targeted.

Inshore attacks against locally trading vessels or against military detachments remain a threat specifically across the Niger Delta, highlighted by various incidents in recent months. Such attacks are not a direct concern for merchant ships in international trade but crews should be vigilant during river transits to and from Nigerian ports.

Outer Gulf of Guinea (Côte d'Ivoire to Gabon)

There were four maritime security incidents in April, involving ships at the anchorages of Luanda (Angola), Monrovia (Liberia) and Abidjan (Côte d'Ivoire). All four cases were thefts or attempted thefts which did not involve any violence against seafarers. Similar to most such cases in the region, the perpetrators escaped when they were discovered and the crew sounded the alarm.

Overall, the security situation at sea has improved in recent years. Nevertheless, 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.

Limited financial and human resources will remain a concern for maritime security agencies across West and Central Africa 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 outer 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 30 April 2025, shown on the map below. Further incident details are available on the Risk Intelligence System.



Incidents

There were four incidents this month related to US military operations against the Houthis in the southern Red Sea. Additional information about Houthi threats can be found in Risk Intelligence's weekly *Security Threat Update: Red Sea/Gulf of Aden*.

16 April – Vessel reports UAV sightings

Suspicious activity, Red Sea

16 April – US forces strike suspected smuggling craft

Counter-insurgency operation, Somali Basin

22 April – Tanker reports suspicious approach

Suspicious activity, Gulf of Aden

26 April – Explosion at Port Bandar Shahid Rajae

Other maritime risk, Persian Gulf

Assessment

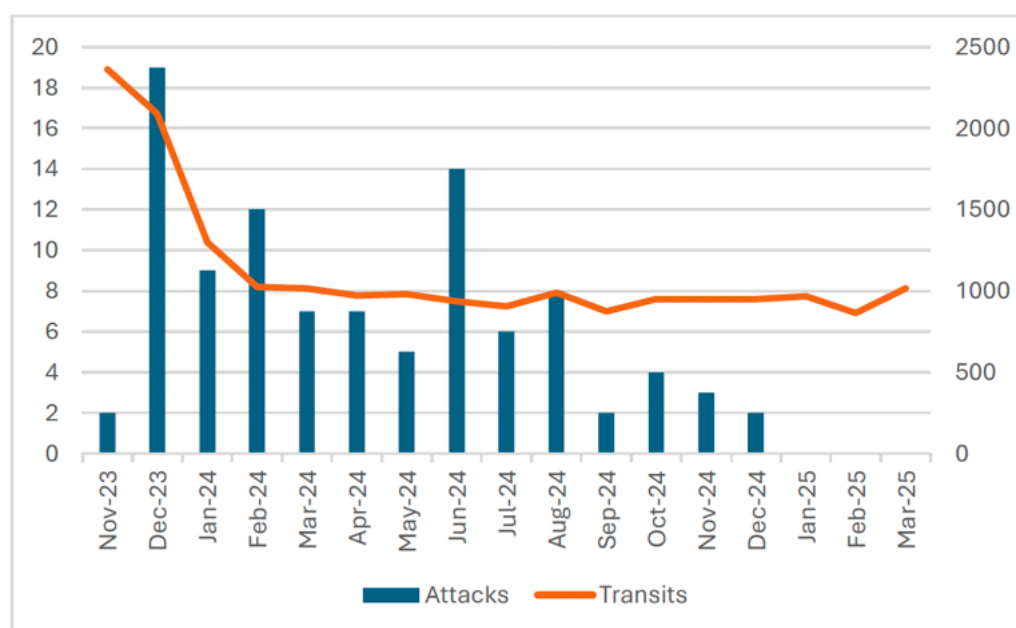
Southern Red Sea – Gulf of Aden

This area covers shipping routes which are affected by the conflict in Yemen, including operations by Houthi forces to target merchant ships transiting through the Red Sea. Incidents in this area during April were limited to US naval operations and bombing attacks on Houthi assets as a continuation of the campaign of US strikes against the Houthis.

The Red Sea campaign by the Houthis against international shipping is effectively paused. The Houthis have conducted no strikes against civilian targets since before announcing the campaign's suspension on 19 January 2025. Currently, the Houthis have banned "Israeli vessels" from transiting the Bab el Mandeb. They have not issued new threats to commercial shipping.

Drone activity is likely in the southern Red Sea. In the northern Red Sea, drone activity is also likely – such as the incident this month where a merchant vessel was approached. The identity of the drones in this incident were not confirmed. A number of law enforcement agencies and militaries in the region utilise UAVs as part of their maritime surveillance operations.

The Houthis have repeatedly signalled that they did not intend to relaunch the campaign. They will likely focus on targeting US naval assets in the short term, as well as occasionally attempting to strike Israel– such as the limited attacks carried out in April. The Houthis are likely to calculate that exchanging ordnance with the US Navy will have the same deterrent effect on commercial shipping as attacking merchant ships directly. This assessment does not preclude a resumption of strikes against civilian vessels, which remains subject to the Houthis' political goals. As shown below, the volume of merchant traffic has been relatively steady over the past 12 months.



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 / Lloyd's List Intelligence/Seasearcher)

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

The security situation in the Red Sea is largely contingent on the situation in Gaza and whether there will be a permanent cessation of hostilities that will satisfy Houthi conditions. The main focus of Houthi operations is expected to be exchanges with US Navy vessels as long as the US-led campaign against the Houthis continues.

Military action has likely degraded some Houthi capabilities, but they have been able to substantially reduce ship traffic in the Red Sea for a relatively low cost. There are therefore no significant barriers to resuming attacks against merchant ships should they determine that there has not been enough progress in the Gaza conflict.

Gulf of Oman – Persian Gulf

There have been no significant maritime incidents in this area for some months. On 26 April, a major explosion took place in the Iranian container port of Shahid Rajaei in the large southern port town of Bandar Abbas. It damaged infrastructure and led to a significant number of casualties. The cause is unknown but has tentatively been attributed to negligent treatment of chemicals used for rocket fuel. There are no specific security concerns although investigations are reportedly ongoing.

Talks have started between the US and Iran over Iran's nuclear programme, although without any substantial progress so far. With US President Trump having stated his reluctance to use force against Iran, the possibility of the status quo through stalled talks is in itself a positive outcome for Iran. This will further reinforce the argument within Iran that a strong military apparatus is necessary to deter aggression by foreign actors, especially without nuclear weapons.

The US has also bolstered its military presence in the region, likely to signal its intention towards Iran that it is serious about its maximum pressure policy. Iran has been cautious in responding to US demands and it is likely that Iran will draw out this pre-negotiation phase for as long as possible so that it can see how the positions of all players – particularly China – will develop. Iran still has the capability to launch limited operations in the Gulf of Oman but there has been no particular escalation in the threat so far.

Additional sanctions were announced in March by the US against Iran's oil exports. Despite the new sanctions, it is not clear how effective they will be. Trade between Iran and China – which includes the vast majority of Iran's exports – takes place outside the US financial system, limiting the ability of the US to levy penalties. It is likely that the US will look for avenues to apply more

sanctions, as part of its 'maximum pressure' policy. These sanctions are becoming increasingly targeted, directed against specific companies and entities involved in Iran's oil exports.

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 reluctant to escalate its conflict with Israel but has 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 the Trump administration would likely provide more support to Israel.

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. These operations are often on a case-by-case basis and linked to specific disputes. If there is aggressive enforcement of sanctions, Iran might be tempted to retaliate on a limited basis.

Somali Basin and wider Indian Ocean

Two incidents were reported in this area in April: a suspicious approach in the Gulf of Aden and a US operation against a suspected smuggling craft.

Recent piracy cases in the area reinforce the current assessment that pirate activities are directed mainly at fishing and locally trading vessels close to the coast. There have been no recent reports of pirate activity far from the coast, as seen in late 2023 and early 2024. It is likely that vessels might be used as 'mother ships', although naval activity is more prevalent farther out in the Indian Ocean and is likely to be acting as a deterrent to pirate activity.

Local traffic is active in the region, particularly in areas close to the Somali coast and in the Gulf of Aden. Proximity of small craft to merchant vessels should be expected and might be mistaken for potential threats. In the incident with the tanker this month, there were no aggressive approaches by the small craft and the distance of the approaches under one nautical mile are typical. The craft were likely to have been local fishing or trading vessels. Nonetheless, it is also expected that pirate groups are monitoring merchant ships in the region.

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 in April 2024 shows that there are still financial incentives for opportunistic pirate attacks despite the deterrent factor of naval operations. The LIAONING DAPING 578 case in December 2024 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 hijackings of merchant ships.



Naval patrolling in the Indian Ocean (Photo: EUNAVFOR)

The militant group al-Shabab remains active in Somalia, despite military efforts by the Somali government with regional and international support to eradicate the group. The US has provided limited but ongoing support, primarily drone strikes against al-Shabab leadership targets. The incident reported this month is consistent with what is known about al-Shabab's maritime operations, which are primarily smuggling.

It is currently not clear whether the US aerial operation against the suspected smuggling craft was a one-off opportunity or shows that the US is increasing the scope and frequency of its military operations to support the Somali government.

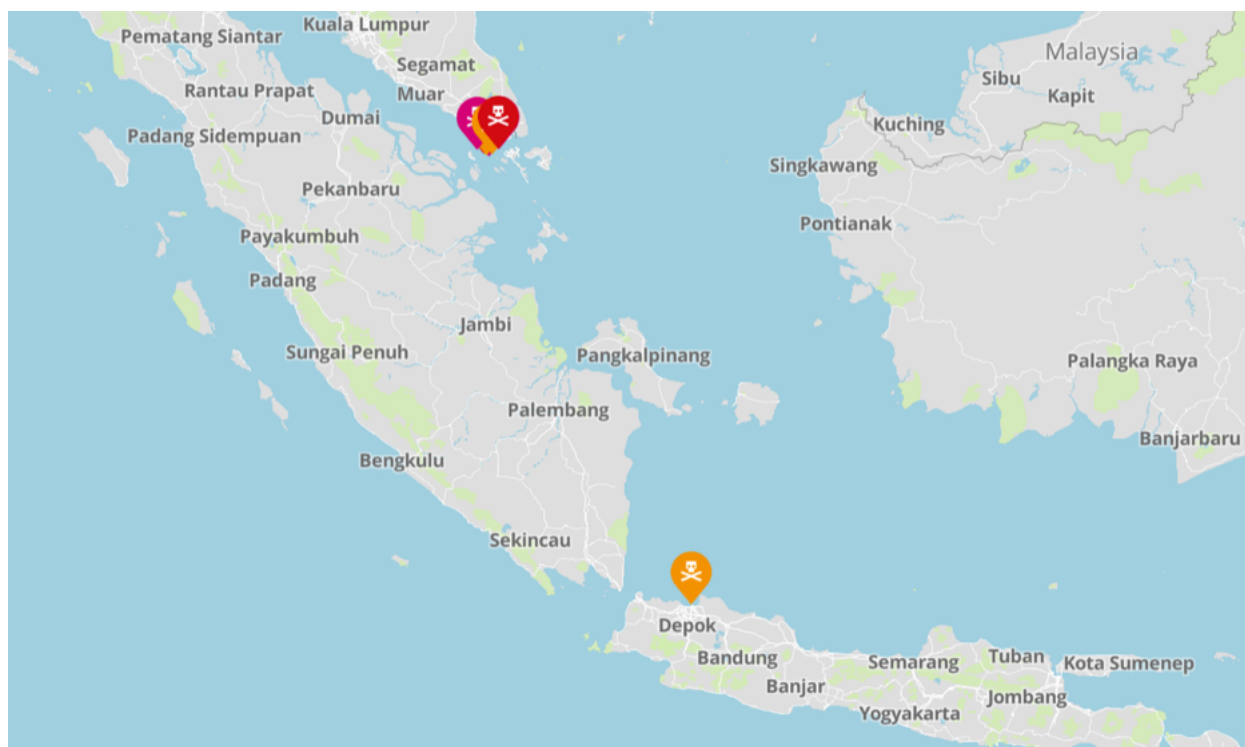
Forecast

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. Hijacking activity is expected to be focused on fishing and locally trading vessels close to the coast.

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. 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 30 April 2025, shown on the map below. Further incident details are available on the Risk Intelligence System.



Incidents

3 April – Container ship SITC YUNCHENG boarded underway

Armed robbery, Singapore Strait

6 April – Bulk carrier SILVER STAR boarded underway

Failed theft, Singapore Strait

7 April – Product tanker HAFNIA HONG KONG boarded underway

Theft, Singapore Strait

20 April – Container ship MSC TARA III boarded underway

Failed robbery, Singapore Strait

21 April – Crude oil tanker AQUARIS boarded underway

Failed robbery, Singapore Strait

21 April – Barge boarded underway

Theft, Singapore Strait

22 April – Bulk carrier PANAGIA FORCE boarded underway

Armed robbery, Singapore Strait

24 April – Container ship boarded

Failed theft, Tanjung Priok, Indonesia

25 April – Bulk carrier ASL TRINITY boarded underway

Theft, Singapore Strait

Assessment

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

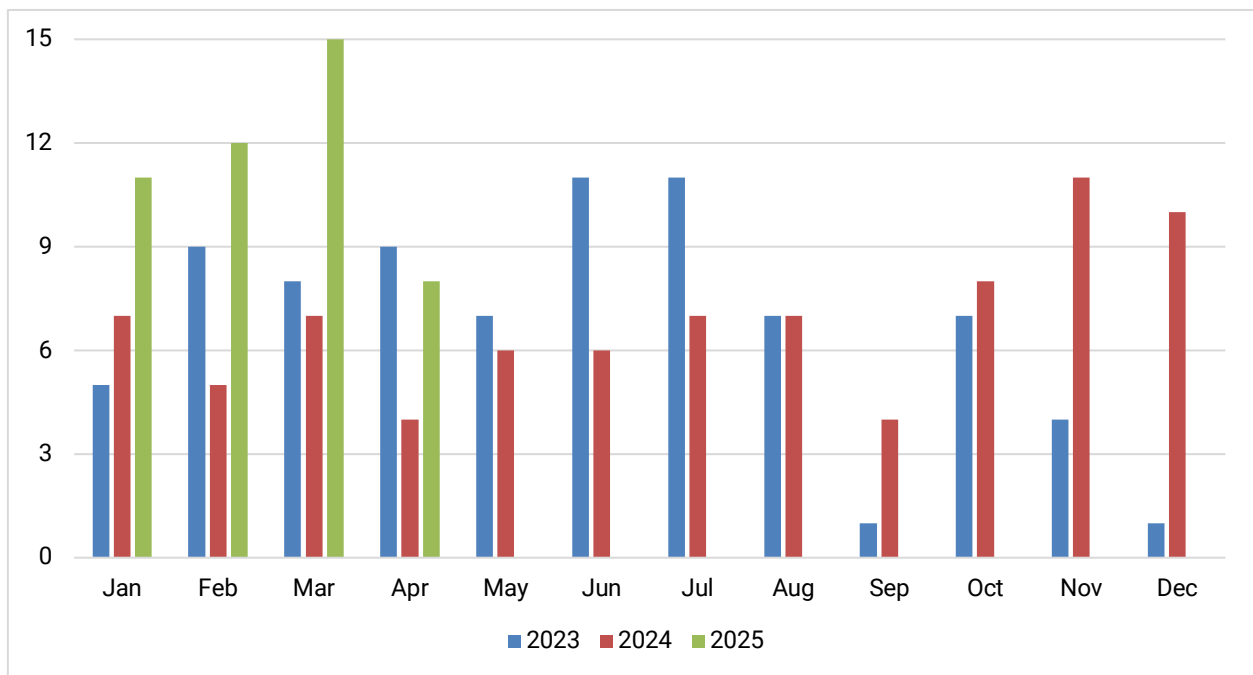
While the wider region experiences regular piracy incidents in the form of thefts and armed robberies, the South China Sea, the Taiwan Strait and also areas northward have attracted attention due to geopolitical developments. Below is an update on this month's piracy activity, followed by an overview of geopolitical events.

Piracy

Boardings in the form of thefts and armed robberies remain the prevalent threats for merchant ships within these areas. Nine incidents were recorded in South East Asia in April. Of these, 44% involved armed perpetrators and eight took place within the boundaries of the Singapore Strait, where bulk carriers, tankers, container ships and barges were boarded in transit. The one incident that did not take place in the Singapore Strait involved a container vessel boarded at berth at Tanjung Priok, Indonesia.

The activity recorded in April illustrates the typical nature of crimes in the region. The trend of perpetrators acting more aggressively towards crew members remains a cause for concern, although the absence of violent confrontations between perpetrators and crew during April was welcome.

Over the past 12 months, 77% 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 2023, 2024 and 2025 to date (Source: Risk Intelligence System)

There have been 105 incidents in the Straits of Malacca and Singapore (SOMS) during the past 12 months. Of these, 97 occurred in the Singapore Strait and 8 in the Malacca Strait. Of the total, 60 involved bulk carriers, 21 involved tankers, 9 involved barges and other craft in tow and 8 involved container ships. The outliers involved general cargo vessels, heavy lift vessels and OSVs. No incidents in the SOMS have involved passenger vessels.

Overall, 90% of all SOMS incidents during this period targeted ships underway, all within the limits of 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 some 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, typical incidents are boardings at anchorages and while alongside, as illustrated by the incident at Tanjung Priok.

Armed robbers and thieves usually board vessels at night and target supplies and equipment while avoiding crew. Areas with the highest frequency of criminal activity during the past twelve months include the Singapore Strait, Tarahan Anchorage and the ports of Balikpapan, Batangas, Batu Ampar, Belawan, Dumai, Manila, Sandakan, Tanjung Priok and Vung Tau. A relatively new location is Indonesia's port of Kuala Tanjung on the Malacca Strait where bulk carriers have been boarded at anchor and alongside.

Although most boardings of vessels underway take place in the SOMS, there have also been incidents involving vessels underway in the Java Sea and the South China Sea. Most incidents in the region involve bulk carriers and tankers.

While reports of boardings targeting oil rigs are infrequent, Risk Intelligence has seen credible evidence of underreporting for oil rig incidents. When such boardings take place, perpetrators

generally target unmanned platforms and steal equipment and supplies, as illustrated by incidents in February 2025 and December 2024.

Two tug hijackings in the Java Sea in 2024, both targeted for their bio-diesel cargos, 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. The arrests of gang leaders 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 lead to increased 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.

Political developments

The South China Sea, the Taiwan Strait, and adjacent areas northward are generally characterised by an absence of immediate maritime threats against commercial ships. There are, however, various political and strategic-level undercurrents that might have implications in the future.



Philippine Coast Guard personnel with the Philippines' flag on a Sandy Cay sandbar in the Spratly Islands (Photo: Jay Tarriela/X)

China held a large-scale military exercise around Taiwan. China deployed 21 warships around the island, including the Shandong aircraft carrier group, along with 71 aircraft and four coastguard vessels. The exercise was focused on precision strikes against simulated targets in the East China Sea, indicating that its purpose was not to carry out actual blockades and strikes. The exercise was conducted after US Secretary of Defense Pete Hegseth's first visit to Asia and his statement to counter Beijing's "aggression".

Taiwan dispatched its own aircraft and ships, and deployed land-based missile systems. These operations were in response to the ongoing exercises and were accompanied by accusations of Beijing being the world's "biggest troublemaker".

Korean peninsula

North Korea is nuclear armed and has a sizable military. The regime wants to protect itself and any escalation could pull in China, Japan, and the US. South Korea and the US conducted joint aerial drills over the Korean peninsula in the most recent joint military exercise. North Korea threatened unspecified retaliation as they viewed the exercise as a provocation.

North Korean leader Kim Jong Un attended a ceremony for the launch of a new multipurpose destroyer, which will go into service early next year. It was reported that North Korea's new class of warships can accommodate dozens of vertical launch cells to carry missiles which its military has already developed.

South China Sea

In early April, the Philippines and US air forces kicked off joint exercises aimed at boosting operational coordination and enhancing "strategic deterrence." The drills followed months of confrontations between Beijing and Manila over disputed areas of the South China Sea.

Personnel from the Chinese Coast Guard landed on Sandy Cay sandbars to unfurl the country's national flag to assert sovereignty over this part of the Spratly Islands. This act was quickly mimicked by personnel of the Philippines Coast Guard.

Political developments with a potential impact on regional conflicts and specifically on maritime security in South East and East Asia are covered in depth in the "Asia Strategic Outlook", issued every six months by Risk Intelligence.

Further to the north, the US military deployed a high-precision anti-ship missile launcher on Batan Island. The deployment of the launcher coincided with military exercises in the area that involved about 9,000 American and 5,000 Filipino military personnel as well as at least 260 Australian personnel. Smaller observer delegations from Japan and other countries were also present during the exercises.

Findings from a newly released study by the Asia Maritime Transparency Initiative indicate that during 2024, Vietnam's land reclamation operations within the Spratly island chain created 260 hectares of new land. This brought the total number to just over 1,335 hectares, nearly three-quarters of China's total. The projects included the establishment of airstrips and military outposts.

Following meetings in Beijing, the defence and foreign ministers of Indonesia and China announced joint commitments to maritime cooperation to promote safety and security in the

South China Sea. The announcement came amid longstanding Indonesian suspicions about China's actions in Indonesian waters.

These developments highlight ongoing tensions, diplomatic initiatives and complexities in the region. Resolutions to all disputes are unlikely in the short term. While widespread conflict is unlikely, these ongoing issues are ever-present and remain a potential concern.

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.

On the geopolitical front, the threat of military operations disrupting the flow of commercial traffic in the region is assessed as low.

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.

RiskIntelligence

Risk Intelligence A/S
Strandvejen 100
2900 Hellerup
Denmark

+45 7026 6230
riskintelligence.eu