



RiskIntelligence

# Monthly Intelligence Report

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## Monthly Intelligence Report

This report includes an overview of attacks against merchant vessels over the past month in three focus regions (West Africa, the western Indian Ocean and South East Asia) as well as assessments of different types of threats in these regions. These areas are currently considered to be the global regions where the threat of such attacks is most significant.

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## Monthly focus:

### India-Pakistan: three markers for the future

#### Background

The territory of Jammu and Kashmir has been disputed by India and Pakistan since partition and independence from Britain in 1947. Since then, it has been a flashpoint for tensions and cross-border hostilities between the two countries – both of which have nuclear weapons.

The increase in tensions and limited strikes across the line of control border in April and May again raised the spectre of further escalation and a wider conflict that could spread from the immediate contested area.

Direct negotiations between Indian and Pakistan have now produced a ceasefire, following a series of retaliatory strikes. However, the overall issue of the contested territory remains unresolved.

These recent events offer three markers for how similar incidents in the future are likely to play out, and how the maritime environment might be affected:

- Military operations are likely to be concentrated in contested border areas.
- Maritime trade restrictions will be used as pressure points.
- Propaganda and misinformation will add to the fog of war.



*Protesters in Pakistan burn an effigy of India's prime minister (Photo: AP)*

## Escalation and response

India has accused Pakistan of sponsoring cross-border terrorist attacks. In the latest incident, there was an attack in Pahalgam, a town in India-administered Kashmir, on 22 April that killed 25 Indian tourists.

The attack was claimed by The Resistance Front, an offshoot of Pakistan-based terrorist group Lashkar-e-Taiba (LeT). LeT was reportedly responsible for the Mumbai attack in 2008, one of the most serious terrorist attacks in India's recent history. The group supports a united Kashmir under Pakistani control.

Two weeks later, on 7 May, India launched Operation Sindoor. This limited military operation, according to India, targeted LeT and other 'terrorist infrastructure' and avoided targeting Pakistani military assets. Civilian casualties were reported in the missile strikes launched from Indian aircraft. Pakistan called the strikes a violation of sovereignty and that it had the "right to respond appropriately." Pakistan then launched Operation Bunyanun Marsoos with its own missile strikes.

Tit-for-tat responses continued, including the use of drones to attack military bases and an engagement of military aircraft. Following international concern, and offers of mediation, India and Pakistan agreed their ceasefire on 10 May.



*The port of Karachi in Pakistan (Photo: KPT)*

## Maritime measures

As the conflict was unfolding in the contested border areas, India and Pakistan implemented maritime restrictions as part of a suite of diplomatic and political responses. On 5 May, as tensions escalated, Pakistani-flagged vessels were prohibited from calling at Indian ports, and Indian-flagged vessels calling at Pakistani ports. India then banned the import or transit of all goods originating or exported from Pakistan.

Karachi Port Trust advised that no Indian-flagged ship could call at the port, or any goods of Indian origin be imported/exported or booked, transited through the port by any ship irrespective of flag, either directly or indirectly or to and from third countries.

With concerns that the conflict might not be restricted to border areas, India raised its port security to ISPS Level 2. For a period on 9 May, Mundra and Kandla ports – some of India's major ports close to the Pakistani border – had restrictions on their operations, including a 'blackout' period where cargo operations were suspended and ships and berths ordered to turn off all their lights.

Pakistani ports also increased inspections and other security measures. The security situation at ports in both countries was relaxed to a degree after the 10 May ceasefire but still with additional measures in place on a case-by-case basis. These additional security measures indicate that India and Pakistan were taking the potential of this conflict to escalate seriously.

Moreover, maritime trade restrictions were used as a way of escalating the dispute through non-military means. India also remains worried about possible terrorist attacks from the sea, in a repeat of the Mumbai attacks of 2008. Maritime border security is therefore a particular concern.

### **Alleged attack on port of Karachi**

As the conflict escalated, the social media account of Pakistan's Karachi Port Trust (KPT) official social media account was hacked, and false posts were made, claiming that the port had been attacked. The KPT responded with statements reassuring that the port was safe and secure. Nevertheless, reports about India attacking the port with naval forces circulated on social media, amplifying the false narrative.

A video showing the attack was later debunked as containing footage from Gaza and a plane crash in Philadelphia but had been viewed widely. Pakistani media showed live footage of the port to further debunk the reports which still created confusion and stoked public outrage in Pakistan. It showed how quickly false information could circulate and that fact checking is required in all situations where claims of significant military action are being made.

Both governments also wanted to show their own responses in a positive light, particularly to rally domestic support. This meant that claims of military success in retaliatory strikes could be overstated, and collateral damage – such as civilian casualties – downplayed. Pakistan, for example, claimed that it shot down between three and six of India's Rafale jets using its Chinese-made warplanes. India has not commented on this claim.

Social media claims were also widespread, particularly in Pakistan, including pictures and videos that were later debunked. Indian social media claimed that there was a disinformation campaign being waged. Government propaganda is one aspect, but competing narratives can quickly develop on social media. This shows how difficult it is to find reliable information for making informed decisions.

## Future markers

The contested territory in Jammu and Kashmir is likely to remain a source of tensions between India and Pakistan. As noted, the original border partition of the two countries at independence has set the template for the dispute, but rising tensions in the 1980s and 1990s led to the formation of groups like LeT that have militarised political issues and created security concerns.

The latest engagements show how quickly incidents of terrorism can escalate to military exchanges. India and Pakistan are both interested in avoiding a wider war, particularly with their nuclear arsenals, but also want to defend their own sovereignty. India's frustration is acute, and the government is under pressure from popular opinion to ensure security within its borders. Pakistan is also defending its interests and its borders and enjoys a measure of support from China. For China, this is also a way of pressuring India over their own border disputes.

Recent events therefore indicate three markers for the future in terms of how similar incidents might escalate and be resolved.

1. India and Pakistan have strong incentives to prevent escalation into a wider conflict. Future military operations are therefore likely to be concentrated in the immediate contested border areas of Jammu and Kashmir rather than spill over into other areas, including the maritime environment.
2. Even if maritime areas are not affected militarily, trade is likely to be a barometer of relations between both countries. Security levels in ports and restrictions on maritime trade between India and Pakistan will likely be continuing features of their relationship.
3. Accurate information about the conflict will be difficult to verify. Fake news reports can circulate quickly, provoking immediate responses. Misinformation and propaganda are likely to continue.

Ultimately, recent events show how political and security tensions between India and Pakistan, even if focused inland far from the coast, can impact maritime operations. The proliferation of misinformation means that appropriate responses can be challenging – and that this is likely to be a recurring feature of future conflicts in general.

## 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](https://riskintelligence.eu/webinars).

# Update: Maritime dimensions of the war in Ukraine

## Situation on land

The port of Odesa was by in a Russian missile strike on 23 May which killed one person and injured eight others. Damages to port infrastructure were also reported. While the incident could be an indicator for renewed attacks against ports, it is possible that the strike was retaliation for massed Ukrainian drone attacks against Russian in the days prior. In this case, a return to regular port strikes may not materialise on its own but future major Ukrainian strikes may lead to more attacks against ports.

Ukraine has, to some degree, continued military activity in the Black Sea. There have been Ukrainian reports of strikes on Russian radar systems on offshore platforms off Crimea as well as Russian reports of engagements with unmanned naval drones in the Black Sea. Other military developments during May, 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.

On 26 May, Ukraine's Western allies announced that they are lifting the range restrictions otherwise imposed on Western-supplied cruise missiles, allowing for strikes inside Russia. This is mainly relevant for the suite of cruise missiles available to Ukraine that are ranged at around 500 km and enable Ukraine to hit targets otherwise out of reach. While the Ukrainians might focus on degrading the Russian war effort by striking command centers, ammunition sites, or similar, it is possible that they will target symbolic targets like the Kerch Strait Bridge, major ports, or significant energy infrastructure.



*SCALP EG missile at the Ukrainian Su-24M bomber in August 2023. Ukraine is now allowed to use this type of weapon without restrictions. (Photo: Ihor Smilyanskyi)*

The Kremlin has described the lifting of range restrictions as a dangerous escalation, and that this could lead to further intensification of the conflict. It should be noted that when Russia previously failed to establish red lines over the use of US ATACMS missiles on Russian territory

in November 2024, Russia launched a new intermediate-range missile against Dnipro to re-establish some deterrence against the use of Western weapons.

Russia is likely to respond to strikes with cruise missiles inside Russia in kind, potentially by targeting Ukrainian ports or other major targets using their own high-profile weapons.

High levels of diplomatic activity continued in May, predominately driven by US efforts to initiate proper peace negotiations. The negotiations in Istanbul around 15 May were part of this effort. These were marked by the absence of key political figures, including President Putin and other top diplomats from Russia. This indicated a lack of serious commitment to the peace process, which ultimately diminished the importance of the talks. The talks failed to establish common ground for Ukraine and Russia to begin meaningful discussion on a ceasefire or peace.

In late May, President Trump made several negative remarks about Putin, despite their otherwise cordial relationship and a reportedly successful phone conversation on 19 May. At the same time, Trump has also continued complaining about the efforts made by President Zelenskyy.

Overall, this may signal a policy shift from the White House about how the warring parties need to get a peace process going, and potentially an end to US efforts on peace negotiations. In general, if the warring parties begin to see the negotiation process as failing to a point where Trump withdraws, they may return to renewed strikes on maritime and energy infrastructure.

The Kremlin prioritises maintaining an outward image to Trump and the US of being benign and sincere in the ceasefire/negotiation efforts. The Russian leadership wants to stay on friendly terms with Trump, and to limit US support for Ukraine. It is possible that Russia has refrained from attacks on Ukrainian ports because the Russian leadership deem such strikes high-profile enough to draw the ire of Trump.

This is also likely why the Russian Ministry of Defence made a statement on the 23 May attack, announcing that the strike targeted and hit a container ship carrying weapons for the Ukrainian war effort. Russian officials later amended the announcement, saying the strike had targeted containers in the port rather than a vessel.

**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

Despite the 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.

Continued negotiations are unlikely without significant US pressure and a potential breakdown is tied directly to Trump's political will and priorities. Given the personality-driven politics of Trump, this is likely dominated by his assessment of the effort made by Putin and Zelenskyy, and whether he considers them to try hard enough to end the war. A return to frequent strikes against ports and energy infrastructure would be preceded by a loss of patience from Trump and his subsequent withdrawal of US involvement in the ceasefire efforts.

Such a loss of patience is beginning to look at least possible based on Trump's recent remarks. While Trump is known to exaggerate and use insulting language against foreign leaders, especially on social media, directly referring to Putin as "crazy" is highly unusual, especially given how the relationship between the two has been noted as being cordial. Further to the comments on Putin, Trump complains that Zelenskyy is obstructing the peace process by making counterproductive statements in the press.

This is a clear indicator of Trump losing patience with the warring parties, and US resolve on the peace process may be failing. Russia has tried to play down the statements by Trump, but unless the warring parties do something fast to try to make it look like progress is being made, it is likely that the US will withdraw from the negotiations process.



*Ukrainian president Volodymyr Zelenskyy during a visit to Türkiye in May 2025 (Photo: Ukraine Presidential Office)*

Should the ceasefire or peace negotiation process completely collapse, there will be little further reason for Ukraine and Russia to appease the US administration by gestures of constraint, and attacks on ports and maritime infrastructure will likely escalate once again, both in Russia and Ukraine.

Adding to this, it is possible that the US will further sanction Russia, or resume support for Ukraine, if Trump feels the need to publicly punish Putin. While possible, the latter is the least likely of the two options, as it will require a significant shift in White House reasoning.

In the unlikely event of a positive breakthrough, a future ceasefire will likely be limited, focusing on specific sectors such as energy or shipping, or geographical areas like the Black Sea. Such instances have previously occurred. Considering the maritime environment is one area where Ukraine has achieved relative superiority over the Russian military, a sea-based ceasefire stands as one of the more acceptable scenarios for Russia. If the Russian leadership sees progress along the frontline, they are unlikely to engage seriously in negotiations. Instead, they may continue to make minor goodwill gestures to appease the US administration. This strategy will enable Putin to include maximalist war objectives in ceasefire demands, thereby hindering substantial negotiations.

The ability of Russia to threaten and successfully attack Ukrainian energy infrastructure remains dependent on Ukrainian capabilities to protect these facilities. The lack of new US supplies of advanced air-defence ammunition may limit Ukrainian capabilities. The effectiveness of Ukrainian military operations will remain dependent on its ability to maintain its own arms production and ongoing support from its partners.

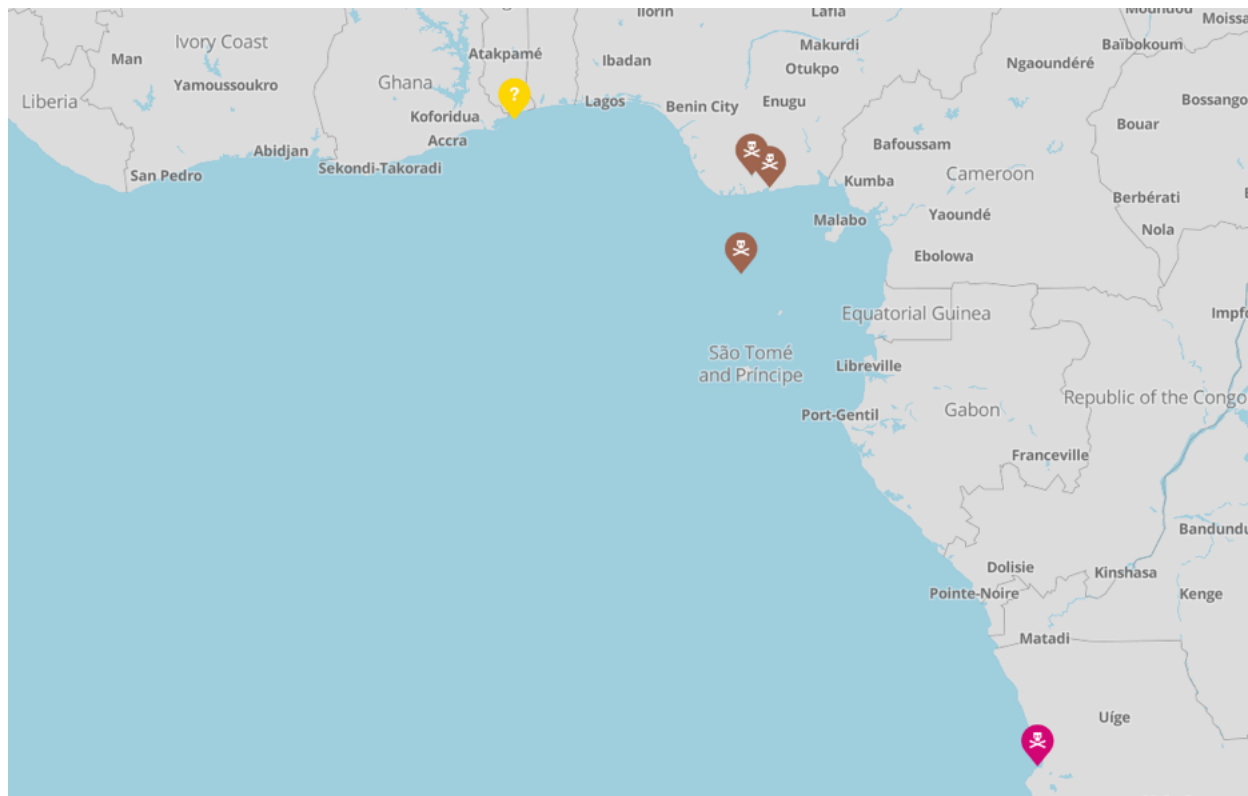
### Further information

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



## Incidents

### **6 May – Local passenger crafts attacked (two incidents)**

Kidnap/ransom, Rivers state (Nigeria)

### **11 May – Merchant ship reports suspicious approach**

Suspicious activity, Lomé anchorage (Togo)

### **23 May – Product tanker BOM JESUS boarded**

Theft, Luanda anchorage (Angola)

### **30 May – Reefer ORANGE FROST boarded**

Kidnap/ransom, 75 nm north-west of Principe island (Sao Tomé and Príncipe)

# 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 reefer in late May around 110 nautical miles south of Nigeria underlined the threat. However, this was also an incident that involved a ship with a suspicious operating pattern.

Prior to the reported attack, the ship had an AIS gap of more than a day during the voyage from Tema (Ghana) to Douala (Cameroon). After departing from Douala, there were again no AIS broadcasts for several hours prior to the incident. These circumstances suggest that this case may have been connected to other illicit activities and that the ship was not a random target.



*Reefer ORANGE FROST off Walvis Bay in June 2024 (Photo: Shipspotting/Alex Matevko)*

Several other attacks had previously been reported in the past twelve months. 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 May. Such attacks are also often linked to other criminal operations, namely to oil-related crimes, or to conflicts between oil companies and local communities.

Overall, crude oil theft and smuggling of illegally refined oil products have long been major concerns for the Nigerian government. Such activities generate significant revenues for organised criminal groups across the Niger Delta. In recent years, profit margins have skyrocketed, leading to a drop in piracy 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 May, the military once again announced that several dozens of illegal refining sites in Niger Delta states had been destroyed. Various vessels transporting stolen crude oil and illegally refined oil products were also 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, although the impact of this situation is almost exclusively domestic.

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 two maritime security incidents in May, involving ships at the anchorages of Luanda (Angola) and Lomé (Togo). The vessel off Luanda was boarded without the crew noticing the perpetrators while the incident off Lomé was initially reported as a suspicious approach before a follow-up report noted that it was very likely a local fishing vessel which should not have been present at the anchorage. Both cases did not involve any violence against seafarers, similar to most such incidents targeting merchant ships at anchor throughout the region. Perpetrators are very likely to escape when they are discovered and the crew sounds 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 31 May 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 Israeli 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*. In addition, there were five incidents related to drone attacks on Port Sudan as part of the ongoing civil war.

### **10 May – GNSS interference suspected**

Other maritime risk, off Jeddah, Red Sea

### **11 May – Irregular activity close to the Strait of Hormuz**

Other maritime risk, Persian Gulf

### **20 May – Product tanker erroneously reports interdiction**

Other maritime risk, Gulf of Oman

# Assessment

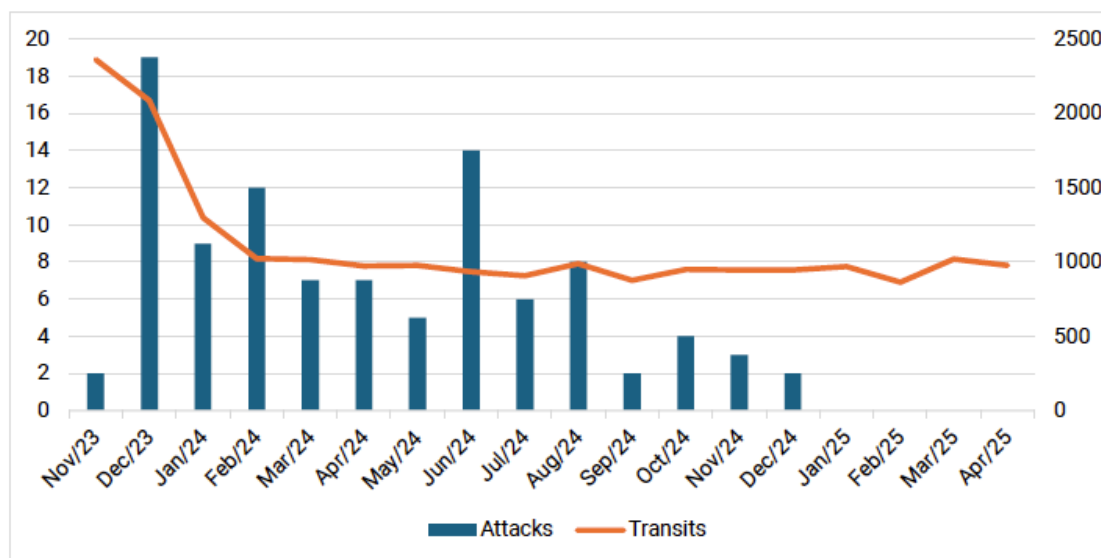
## Southern Red Sea – Gulf of Aden

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

The situation in the Red Sea has remained stable since the ceasefire was announced. Both sides have refrained from conducting strikes on each other's assets. Meanwhile, the Houthis have continued their attacks on Israel as this aspect was deliberately excluded from the deal with the US. The Israeli military carried out retaliatory airstrikes against the airport in Sana'a on 28 May.

The Houthis have also announced a "maritime blockade" on the port of Haifa in Israel. While this announcement has not changed the threat situation in Haifa, it allows the Houthis to conduct strikes against commercial ships when the respective owners are also calling at Haifa with other ships in their fleet.

The Houthis will likely continue to focus on occasional attempts to strike Israeli territory, as demonstrated by continued strikes this month. This assessment does not preclude a resumption of strikes against commercial ships, which remains subject to Houthis' political goals, especially if the volume of maritime traffic in the Red Sea resumes to a level that undermines claims that an effective embargo has been implemented. Despite the absence of attacks so far in 2025, there has been no real increase in transits through the Red Sea (see graph below).



*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.

Rebel forces in Sudan's civil war, reportedly supported by the UAE, launched a series of drone strikes on the government-controlled city of Port Sudan in early May. The strikes did not prevent operations at the port, though they have been complicated as the strikes targeted fuel depots, an electric substation, and the city's airport. Further strikes are possible and the threat remains elevated for the port and the wider area.

Concerns about interference of navigational systems in the Red Sea have also increased. This has affected civilian maritime traffic with incidents reported this month, including the grounding of one ship off Jeddah (Saudi Arabia). These issues are most likely due to electronic warfare systems operated by military forces, both from the region and from various Western countries operating there.

### 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 the conflict has now shifted to limited attacks by the Houthis on Israeli territory with Israeli air strikes in retaliation.

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. One incident was reported on 11 May which involved small craft affecting navigation close to the Strait of Hormuz. The identity of the craft or whether they were a security threat have not been confirmed

A vessel also reported being interdicted on 20 May, presumably by Iranian naval forces, in the Gulf of Oman. It was subsequently confirmed that no incident had taken place. The product tanker involved is suspected to have been involved in Iran's sanctioned oil exports.

The fifth round of US-Iran nuclear negotiations, held in Rome and mediated by Oman, ended with "some but not conclusive progress," according to Omani officials. Both sides remain far apart on key issues, especially Iran's uranium enrichment programme. No date has been set for a sixth round of talks. Iran is awaiting further communication from Oman, the main intermediary. The US has continued its maximum pressure policy against Iran but has also warned Israel not to disrupt the talks. Iran and the US are likely to want to avoid any escalation or military actions in the area that might prevent further negotiations.

Despite new US 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, as long as there are negotiations with the US over Iran’s nuclear programme.

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

There were no incidents in this area in May. 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 relatively dense 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. Approaches by small craft to distances of under one nautical mile are typical. Such craft are likely to be 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.



*A naval helicopter monitoring the ABDULLAH in 2024 (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.

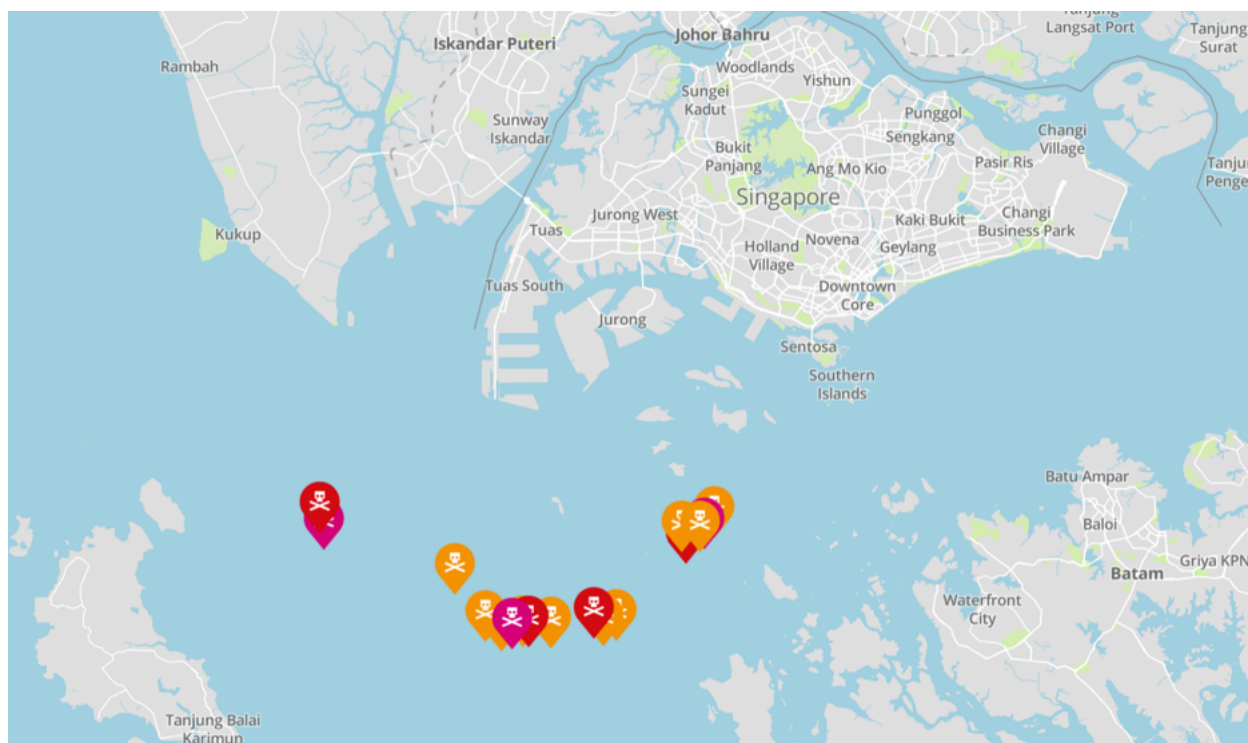
### Forecast

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



## Incidents

### **2 May – Product tanker CULTURE boarded underway**

Failed theft, Singapore Strait

### **2 May – Chemical tanker S M A boarded underway**

Theft, Singapore Strait

### **5 May – Bulk carrier SW LEGEND boarded underway**

Failed theft, Singapore Strait

### **7 May – Bulk carrier VIRGO boarded underway**

Armed robbery, Singapore Strait

### **7 May – Product tanker ELM GALAXY boarded underway**

Failed theft, Singapore Strait

### **7 May – Bulk carrier HUI SHUN NO. 1 boarded underway**

Armed robbery, Singapore Strait

**8 May – Barge JIN HWA 37 boarded underway**

Theft, Singapore Strait

**14 May – Bulk carrier DIONI boarded underway**

Theft, Singapore Strait

**17 May – Bulk carrier THALASSINI AVRA boarded underway**

Failed robbery, Singapore Strait

**20 May – Crude oil tanker PLATA SOUTH boarded underway**

Armed robbery, Singapore Strait

**22 May – Bulk carrier PEACE boarded underway**

Failed robbery, Singapore Strait

**22 May – Bulk carrier boarded underway**

Failed theft, Singapore Strait

**22 May – Bulk carrier ALPHA PEACE boarded underway**

Failed theft, Singapore Strait

**23 May – Product tanker PETREL PACIFIC boarded underway**

Armed robbery, Singapore Strait

**23 May – Bulk carrier AEOLIAN GRACE boarded underway**

Armed robbery, Singapore Strait

**25 May – Bulk carrier LIGARI boarded underway**

Failed theft, Singapore Strait

**27 May – Bulk carrier STRANDJA boarded underway**

Failed robbery, Singapore Strait

## Assessment

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

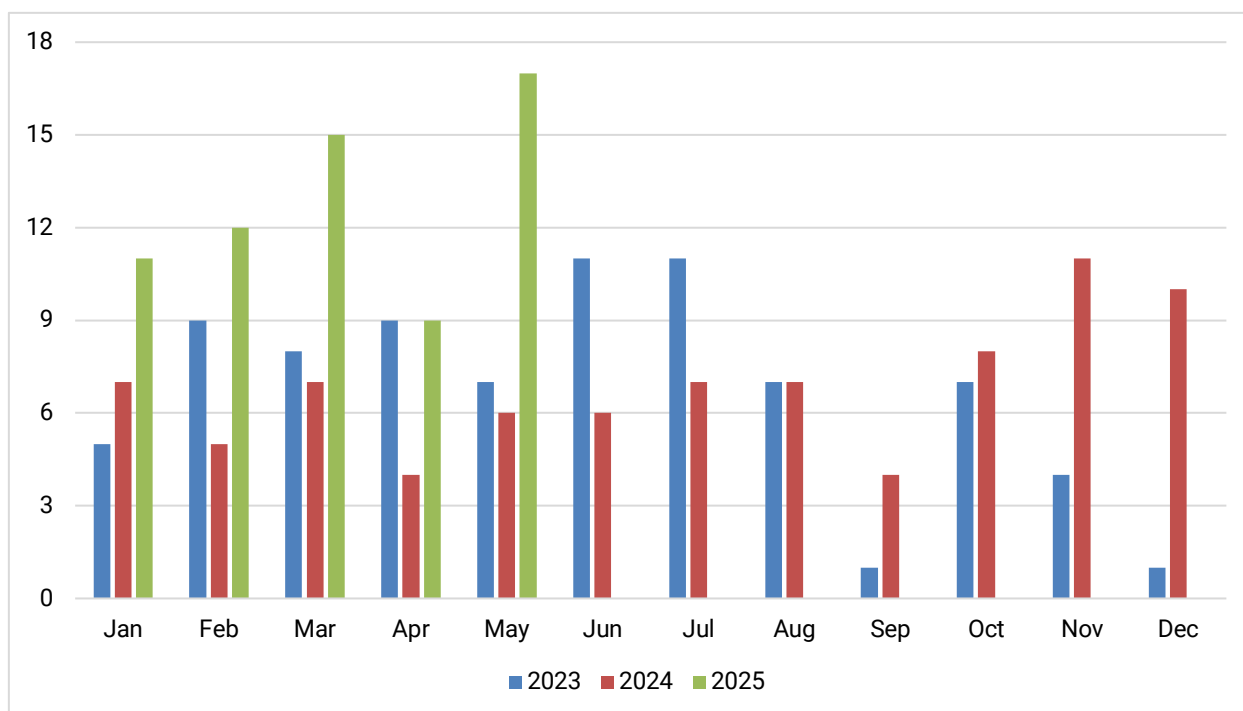
While the wider region experiences regular piracy incidents in the form of thefts and armed robberies, the South China Sea, the Taiwan Strait and also areas northward have attracted attention due to geopolitical developments. Below is an update on this month's piracy activity, followed by an overview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

## Piracy

Thefts and armed robberies remain the prevalent threats for merchant ships within these areas. Seventeen incidents were recorded in South East Asia in May, the highest number of reported incidents during the previous six years and well above the monthly average. All reported incidents during May took place within the boundaries of the Singapore Strait. The last month for which all reported attacks took place in the Singapore Strait was August 2024. In May, 47% of the vessel boardings involved armed perpetrators. With the exception of one barge boarding, all incidents targeted bulk carriers and tankers. The last boarding of a container ship took place on 24 April, ending a brief spate of container ship boardings in March and April.

The activity recorded in May illustrates the typical nature of crimes in the region, characterised by thefts and armed robberies. The trend of perpetrators acting more aggressively towards crew members remains a cause for concern, as illustrated by the head injury suffered by a crew during the STRANDJA incident.

Over the past 12 months, 84% percent of reported incidents in the region have taken place in the Singapore Strait. Of these, 59% 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 117 incidents in the Straits of Malacca and Singapore (SOMS) during the past 12 months. Of these, 113 occurred in the Singapore Strait and only 4 in the Malacca Strait. Of the total, 68 involved bulk carriers, 25 involved tankers, 10 involved barges and other craft in tow and

7 involved container ships. The outliers involved general cargo vessels, heavy lift vessels and OSVs. No incidents in the SOMS have involved passenger vessels.

Overall, 94% of all SOMS incidents during this period targeted ships underway, all within the limits of the Singapore Strait. During the past twelve months, 85% 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 rarely attack the crew unless provoked. For the wider region, typical incidents are boardings at anchorages and alongside.

Armed robbers and thieves typically 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, Kuala Tanjung, Manila, Sandakan, Tanjung Priok and Vung Tau. 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.

While reports of boardings targeting oil rigs are infrequent, there is 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 biodiesel 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.



*Chinese H-6 bombers parked on the tarmac of an airfield on Woody Island, in the disputed Paracel archipelago, South China Sea (Photo: MAXAR TECHNOLOGIES)*

During Singapore's Shangri-La Dialogue at the end of May, US Defense Secretary Pete Hegseth warned of the military threat from China and North Korea, urging Asian nations to increase defense spending and enhance regional deterrence, particularly in response to China's manoeuvres around Taiwan. China condemned these remarks, urging the US to stop using the Taiwan issue as 'leverage' against them and interfering in regional peace and stability.

Hegseth's comments might have been prompted, amongst other things, by satellite imagery showing that China has positioned two of its most advanced bombers in the disputed Paracel islands, a development seen by some analysts as Beijing's latest signalling of its growing military capabilities to rivals. The deployment reportedly marks the first time the long-range H-6 bombers have landed on Woody Island in the Paracels since 2020.

### *Korean peninsula*

North Korea's second naval destroyer was damaged in a failed launch. During a launching event at the northeastern port of Chongjin, a newly built 5,000-ton-class destroyer became unbalanced and sections of its hull were punctured after a transport cradle on the stern section slid off and became stuck. The damaged vessel was likely the same class as the country's first destroyer unveiled last month. The naval build-up is part of North Korea's response to perceived threats from the U.S. and South Korea, which have been expanding joint military exercises in response to the North's advancing nuclear program

### *Yellow Sea*

While China's navy conducted combat patrols near the disputed Scarborough Shoal, South Korea announced that its forces found new Chinese buoys in the Yellow Sea. These developments overlapped exercises conducted by the coast guards of the Philippines and the US that took part for the first time in joint maritime exercises with naval and air force units in the South China Sea.

## *South China Sea*

It came to light during May that in late April, US forces fired six rockets into the South China Sea from a HIMARS launcher positioned near the western coast of Palawan. The island province lies lengthwise against the sea, where the Chinese and Philippine coast guards have clashed over competing maritime claims. The live firing exercise demonstrated the HIMARS' anti-ship potential during the annual US/Philippine Balikatan military exercise.

In another South China Sea exercise, the Royal Australian Navy's destroyer HMAS SYDNEY joined a guided missile frigate from the Philippine Navy and aircraft from both the US and the Philippines to conduct drills. Australia's Department of Defence said the exercises were aimed at building mutual understanding and interoperability between nations and armed forces. In contrast, a Chinese Foreign Ministry spokesperson told reporters that Australia's joint military exercises with the US and Philippines in the South China Sea were an attempt to "create trouble".

**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.**

## *East China Sea*

While incursions by China's air force into Taiwanese airspace attract significant attention, similar events also occur elsewhere in the region. In May, Japan and China accused each other of violating the airspace around the Japanese-controlled East China Sea islands, claimed by both nations.

Japan's foreign ministry said in a statement that it lodged a "very severe protest" with Beijing after a Chinese helicopter took off from one of China's four coastguard boats, which had entered Japan's territorial waters around the Senkaku Islands. The helicopter violated Japanese airspace for about 15 minutes. The statement called the incident an "intrusion... into Japan's territorial airspace" and urged the Chinese government to ensure preventive measures.

China also protested to Tokyo over a Japanese civilian aircraft violating its airspace around the islands, saying it was "strongly dissatisfied" with Japan's "severe violation of China's sovereignty," according to a statement by the Chinese Embassy in Japan.

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, 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.

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