



RiskIntelligence

Client briefing: Maritime implications of the Iran-Israel conflict

June 2025

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Overview

On 13 June 2025, Israel started a wave of military strikes against Iran. Dozens of targets across Iran related to the country's nuclear programme and other military facilities have since been struck by the Israeli military. Israeli officials claimed that the goal was to damage Iran's nuclear programme and to show a strong response to the Iranian regime's ongoing aggression against Israel.

The conflict is ongoing and there are currently no signs pointing towards an end of hostilities. This situation could have spillover effects for international commercial maritime traffic, but direct impacts are likely to remain limited. Iran has so far retaliated directly against Israel with drone and missile attacks. Additional Israeli and Iranian strikes are expected, and Israel may expand its targeting of oil-related infrastructure across Iran. A primary consideration for the Iranian government will therefore be whether disruptions of traffic in the Persian Gulf and the Strait of Hormuz would be a useful response.

The conflict between Iran and Israel is linked to Israeli military actions in Gaza and Iran's nuclear programme. These are important considerations but are not significantly affecting the maritime security situation. US military spokespersons have confirmed that the US military has been involved in assisting Israel against Iranian ballistic missile attacks. Iran has responded with threats against US military facilities in the region. However, Iran needs to carefully balance any escalation with its desire to avoid clashes between its own military and US forces.

During the conflict and exchange of attacks in October 2024, there was a limited impact on international commercial maritime operations. While the threat in the maritime area has somewhat increased in the immediate aftermath of Israel's attacks on 13 June, it may recede in the short term as miscalculations and the risk of collateral damage from initial military activities recede. Iran and Israel have been involved in large-scale retaliatory strikes which have targeted onshore energy and commercial infrastructure.

Israel may aim for widespread destruction of Iran's oil and gas infrastructure in a bid to accelerate regime change and neuter Iran. Iran is expected to retaliate against economic facilities as well as part of its economic warfare doctrine. This includes the targeting of port facilities in Israel as well as Israeli offshore installations which are as crucial to Israel's economy as Iran's oil infrastructure is to its own.

Current threats for maritime operations

There are recurrent concerns – which are frequently cited in media reports – that Iran may respond to the ongoing Israeli attacks by preventing ships from passing through the Strait of Hormuz. In a worst-case scenario, it is even thought that Iran could attack energy facilities throughout the Persian Gulf. These threats should be carefully monitored but are currently assessed as low.

Both the effective closure of the Strait of Hormuz and attacks against other countries in the region are considered to be Iran's ultimate measure. They would therefore very likely be used only in case of an existential threat to the Iranian regime. As damaging as the current Israeli strikes are, they are not yet an existential danger to the Iranian regime where the political and military chains of command are far from collapsing.

By extension, attacks against merchant ships or detentions of individual vessels in the Persian Gulf, the Strait of Hormuz or the Gulf of Oman are currently unlikely. Such operations would have virtually no impact on Israel. At the same time, they could have a negative impact on Iran when the US and regional countries are drawn into the conflict. Any disruption of crude oil and natural gas supplies from the Persian Gulf would also have a negative impact on China which is by far Iran's largest trading partner.

In Iran, the Israeli assault is perceived as unprovoked. Israeli calls for Iranian insurrection therefore legitimise the regime's status as a defender of the people against foreign aggression in the eyes of the Iranian regime and their supporters. This also obliges the regime to respond, any efforts in the maritime environment will therefore very likely be designed for their visibility and impact. This would suggest a continued effort by the Iranian military to target port facilities in Israel and possibly, depending on the chosen escalation path, Israeli offshore platforms in the Mediterranean.

Currently, the main threat to international shipping is collateral damage, which may change should the US and other countries become involved, or should the conflict escalate to a level where the Iranian regime is significantly threatened.

Potential targets for Iranian retaliatory strikes

It is very likely that Iran will continue to target military facilities, economic infrastructure and population centres in Israel.

It is likely that Iran will target Israeli offshore facilities in the Mediterranean.

It is unlikely in the current situation that Iran will attack non-Israeli targets, e.g. US military facilities in the region, port/energy infrastructure in Persian Gulf countries, or international commercial shipping.

Further information

Risk Intelligence provides information about maritime security-related incidents as well as constantly updated threat assessments for the Persian Gulf, all coastal countries and a large number of ports and terminals in the region through the Risk Intelligence System.

In addition, Risk Intelligence offers Voyage Risk Assessments to assess the overall vessel and route risks and security needs for individual voyages to and from ports and terminals around the Persian Gulf.

Bespoke reports in relation to ongoing and planned operations are possible on a broad range of security-related topics. Get in touch with your client manager or the sales team (sales@riskintelligence.eu) to get further details.

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