



RiskIntelligence

Client briefing: Maritime implications of the Iran-Israel conflict (Update)

June 2025

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Overview

On 21 June 2025, the US conducted strikes against three Iranian nuclear facilities, following up on eight days of Israeli strikes on targets across Iran. The impact of the US strikes is currently unknown, but Iran has threatened retaliation. Iran's options are limited in the maritime environment. None of them, however, can be excluded given the unprecedented scenario.

Overall, Iran is likely to prioritise its regime's survival and seek to conserve its ammunition to allow for retaliation against Israel in the longer term. It is unlikely to escalate a conflict which it knows would not play out in its favour.

Iran's immediate options for retaliation are to target port facilities in Israel, which it has already been doing. It is expected to focus fire on Haifa port and the Israeli coast, as the closest viable target for its ordnance. This has complicated operations in Israel, but no further disruptions are expected in the Mediterranean.

In the Persian Gulf, Iran also has the possibility to target civilian facilities belonging to nations aligned with the US and – to an extent – Israel. This would imply substantial disruptions to maritime trade in the short term. This option is not favoured by Iran as it would not assist its regime's survival and alienate vital trade partners. The likelihood of such a course of action is therefore low.

Iran may also choose to target merchant shipping associated with the US or Israel in the Persian Gulf and the Gulf of Oman through seizures, attacks or harassment. While the strategic benefit of such an option is limited, it may serve to demonstrate to the Iranian population that some retaliatory action is being taken.

Furthermore, Iran can choose to target US military facilities around the Persian Gulf, at the risk of provoking a more brutal US assault on its interests, something which it seeks to avoid. This also includes the targeting of US government facilities such as consulates and embassies.

Finally, Iran may choose to attempt to disrupt maritime traffic through the Strait of Hormuz, though such an action, considered to be Iran's "ultimate act", would not serve its purpose of regime survival and mostly upset its partners. Following the US strikes, an aide of Ayatollah Ali Khamenei specifically referred to "American, British, German, and French ships" which should be prohibited from passing the Strait of Hormuz as an appropriate response.

Regardless of the chosen option, it should be noted that the conflict's actors are not behaving within historical norms of rationality or respect of policy precedence, complicating any efforts at anticipating their actions. All actions include a possibility of collateral damage.

Potential targets for Iranian retaliatory strikes

The list below is ordered based on the probability of the respective actions, assuming that the involved actors avoid making unprecedented decisions that would previously have been considered irrational. However, it must be noted that many factors that would typically aid in assessing rational choices for the respective actors are currently impossible to evaluate even with limited certainty.

- Civilian and military targets on land in Israel
- Offshore facilities in Israel's territorial waters and EEZ
- Commercial shipping associated with the US or Israel in the Persian Gulf/Gulf of Oman (by Iranian forces) and in the Red Sea/Gulf of Aden (by Houthi forces)
- US government (civilian and military) targets on land throughout the Middle East
- US military assets at sea in the Persian Gulf/Gulf of Oman (by Iranian forces) and in the Red Sea/Gulf of Aden (by Houthi forces)
- Oil and gas production and export facilities on land in US-aligned countries in the Persian Gulf region
- US and Israeli interests including other commercial operations throughout the Middle East and possibly elsewhere

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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