



RiskIntelligence

# Middle East

# Weekly Intelligence Report

23 July 2025

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# Middle East Weekly Intelligence Report

This report provides an overview of the current maritime security situation in different parts of the Middle East, notably the southern Red Sea/Gulf of Aden and the Persian Gulf/Gulf of Oman areas. It is primarily aimed at assessing the threat of attacks against different types of merchant ships operating in these areas.

Due to the current situation across the region, coverage for the report has been expanded from the previous focus on shipping routes along the Yemeni coastline.

Comprehensive descriptions for individual incidents as well as statistics about attacks against merchant ships are available on the Risk Intelligence System.

Time of latest intelligence included in this report: 23 July 2025, 08:00 UTC.

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## Current situation

**This week has seen no major events take place. No attacks were conducted by the Houthis, which is not saying that further attacks are stable, and indicate that a return in the medium term is unlikely. Israel has struck Hodeidah port on 21 July, to no significant effect.**

**Likewise, the rumours of Iranian purchases of Chinese material are proving insistent, with added reports of anti-aircraft systems being purchased. Russian news media have also begun reporting on the matter quoting Russian sources. Risk Intelligence Yemen sources have shared unsubstantiated reports of an attempted pirate attack off Aden, forcing a vessel to engage in evasive manoeuvres within the last 2 weeks.**

US forces have carried out military strikes against targets in Houthi-controlled areas of Yemen between January 2024 and January 2025. An intensified US campaign was then carried out from March to early May 2025. The strikes were conducted both unilaterally and as joint strikes with the UK military, supported by several other countries.

US-coordinated offensive military actions have been conducted under Operation Poseidon Archer. For political reasons, these were separate from the US-led Operation Prosperity Guardian which is merely aimed at protecting commercial shipping.

Since the beginning of the Houthi campaign in November 2023, Houthi forces have largely stuck to publicly announced targeting criteria. Some attacks during the early stages of the campaign apparently relied on outdated information about individual ships. Overall, Houthi attacks against merchant ships have not decreased despite widespread claims by the US and other Western governments.

### Red Sea campaign's status

Vessel number through the Red Sea have not significantly decreased, speaking to the nature of traffic going through. Very few "valid" targets in the Bab el Mandeb.

The lack of significant change in weekly passage numbers speaks to the nature of trade in the region, which is largely leaving few valid targets – but also this undermines the reports that traffic had indeed been growing. Any growing would imply vessels who would be more likely to be targeted by the Houthi, and there is no reason to believe that commercial operators who could safely operate through there.

### Threat levels

In the Red Sea and the Gulf of Aden, Houthi forces have expanded their list of potential targets several times since November 2023. Some attacks were likely carried out based on outdated information in publicly available databases, underlining the threat level for collateral damage.

Current threat levels reflect both the enduring status quo and shifting Houthi rhetoric, which appears to be focusing more on attacking Israeli territory than vessels while not announcing any suspension of its maritime efforts.

Overall, US and Western European vessels are exposed to an intrinsically higher threat level than vessels from other countries – a consequence of the perceived alignment of European foreign policy on US goals, including their support for Israel.

The new attacks by the Houthis support Risk Intelligence's threat indicating that vessels calling Israel are at a severe risk of being struck by the Houthis.

Potential targets	Threat type	Threat level
Merchant ships specifically linked to Israel through ownership, port calls, trade with and/or commercial relationship between Israeli companies and owners/operators	Kinetic attack (missile, aerial/waterborne drone), possibly seizure and detention	<b>Severe</b>
Merchant ships linked to the United States, United Kingdom and other countries involved in Operation Poseidon Archer	Kinetic attack (missile, aerial/waterborne drone), possibly seizure and detention	<b>Elevated</b>
Merchant ships linked to countries participating in or supporting Operation Prosperity Guardian or Operation Aspides	Kinetic attack (missile, aerial/waterborne drone), possibly seizure and detention	<b>Elevated</b>
Other merchant ships in transit through the Red Sea/Gulf of Aden	Kinetic attack due to misidentification, potential proximity to the above threats ('collateral damage')	<b>Moderate</b>

The Houthis are expected to continue targeting vessels which are owned by companies that are trading with Israel, meaning a continued severe threat level for these ships. They are likely to show more restraint in targeting US/UK ships, following the deal announced on 6 May 2025.

Despite multiple military operations, Houthi forces remain capable of conducting attacks. These are not limited to the southern Red Sea where they control a large portion of coastline. Several ships have also been struck in the Gulf of Aden. Attacks by drone boats, however, are very likely limited to the southern Red Sea.

While the Houthis' ability to launch missiles have been likely degraded by military strikes, the strikes' actual impact cannot be assessed. Moreover, reports about military actions are solely

based on military sources and not independently verified. Any meaningful and sustainable reduction of the threat posed by the Houthis would require a longer-term mission.

For merchant ships linked to countries solely supporting the US-led and EU-led naval operations with a defensive mandate, the threat level is assessed as lower compared to countries participating in offensive military actions. For all other commercial ships, the same threat level applies.

Vessels not related to countries taking part in naval operations may be targeted due to misidentification. Proximity to kinetic attacks or to interceptions of drones and missiles by military forces could also lead to collateral damage.

Finally, it is vital to consider that the situation remains dynamic and requires close monitoring. Updates regarding incidents as well as constantly updated assessments of current threat levels are available through the Risk Intelligence System.

## Background

Starting with the seizure of the GALAXY LEADER on 19 November 2023, Risk Intelligence has identified dozens of attacks by Houthi forces in the Red Sea and the Gulf of Aden. The number of attacks against merchant ships has been limited since September 2024, due to the limited number of potential targets and the fact that the Houthis have firmly established the threat.

This analysis is supported by traffic figures which suggest that the shipping industry has adapted to the situation. Even when no attacks had been conducted by the Houthis for several weeks, maritime traffic did not increase. At the same time, clusters of attacks have not caused a further decrease in traffic either (see Figure 1).

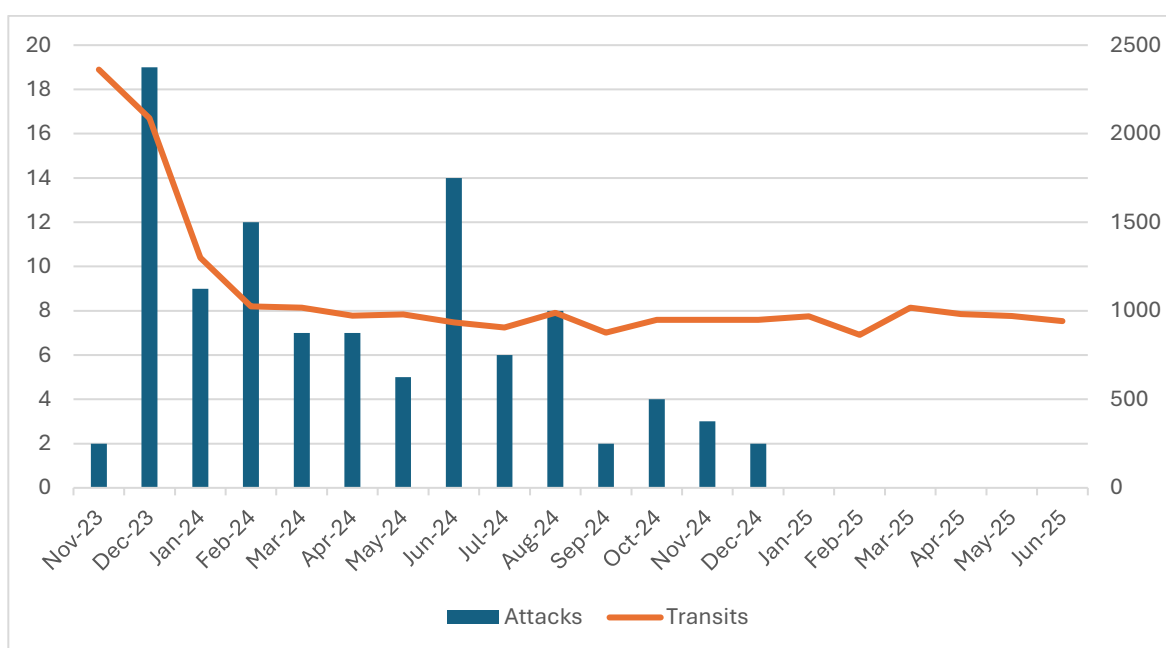


Figure 1: Attacks against merchant ships per month (blue columns) and number of monthly Bab el Mandeb transits by merchant ships >10,000 dwt (red line) (Source: Risk Intelligence System / Lloyd's List Intelligence/Seasearcher)

**Note: Detailed statistics about Houthi attacks against commercial ships in the Red Sea and the Gulf of Aden since November 2023 are also available on the Risk Intelligence System.**

Figure 1 indicates that the Houthis have reached their goal and are more likely to be reacting to political events than to maritime activity in the Red Sea and the Gulf of Aden. The amount of maritime traffic in this area has remained steady since February 2024, regardless of attack levels.

The decision to return to the Red Sea will very likely be determined by economic factors, e.g. insurance premiums or pressure from charterers, possibly supported by political declarations that would placate the Houthis.

Figure 2 below indicates that the shipping industry in general is still adopting a "wait-and-see" attitude regarding a potential return to Red Sea transits, though the pressure on mounting a return is increasing. Nobody wants to go first, but nobody wants to be last.

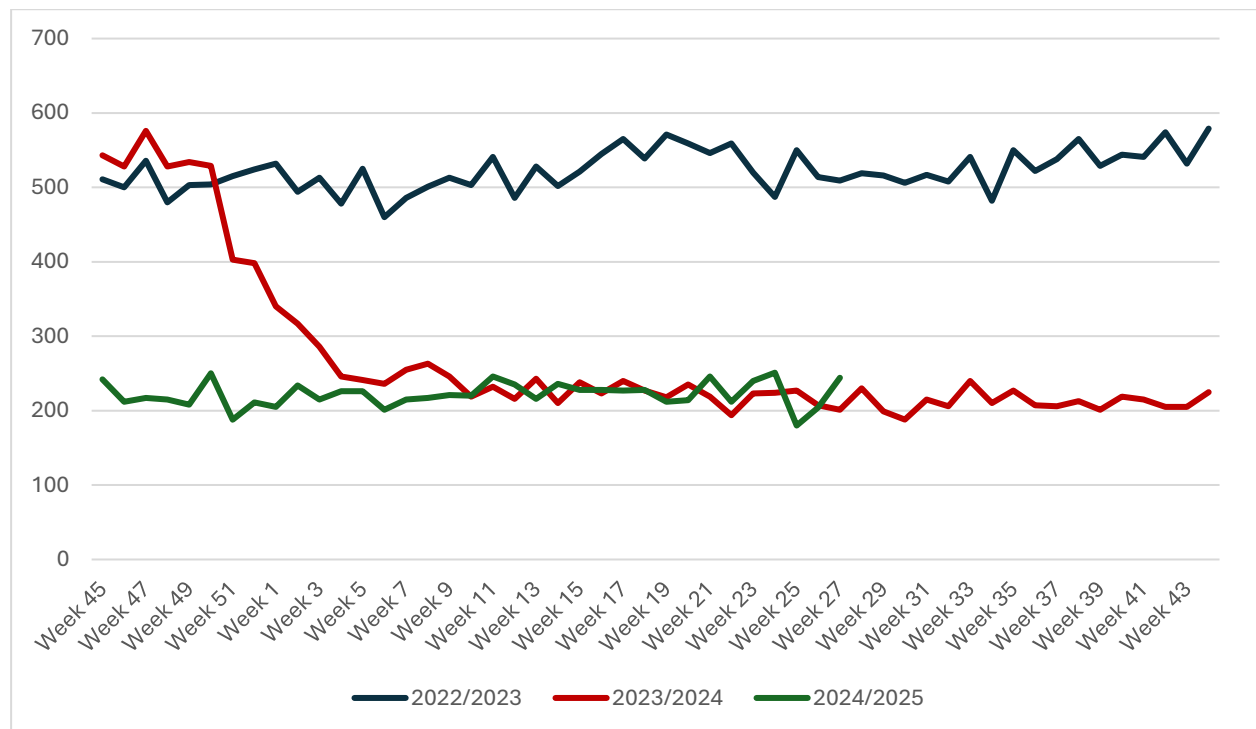


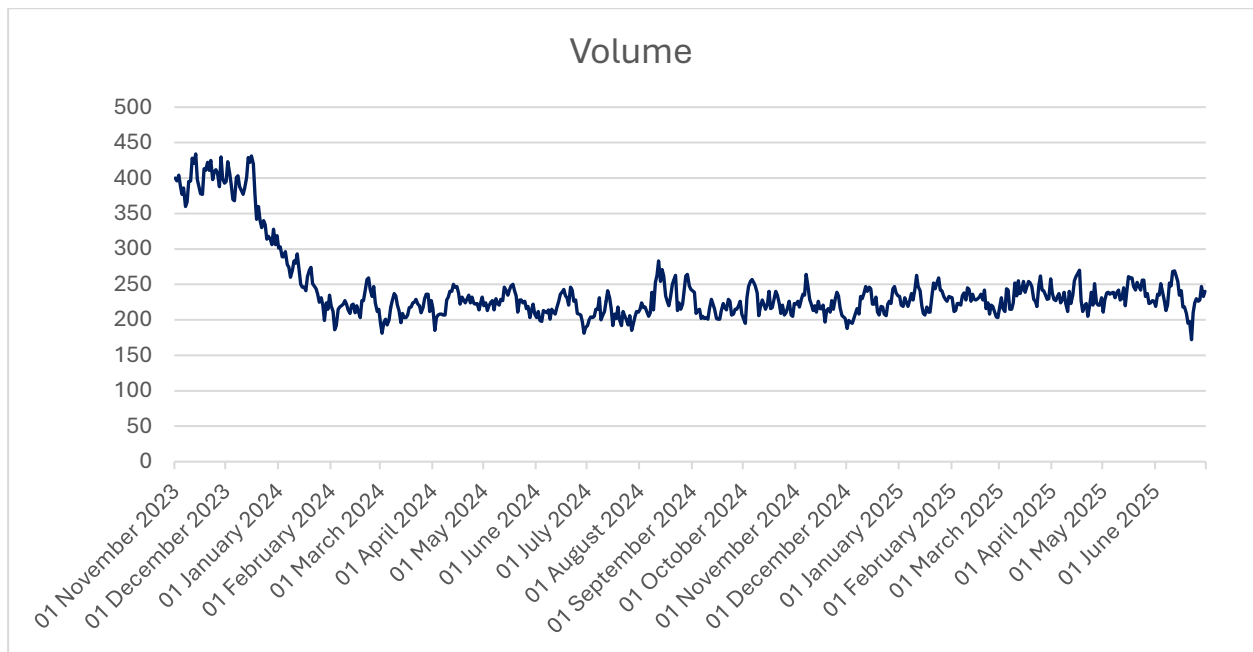
Figure 2: Suez Transits Year on Year comparison, indicating a sustained decrease to the new normal, even with several months without attacks by Intelligence/Seasearcher)

Ongoing military operations have not lowered the threat level for commercial shipping substantively. For transits through the Gulf of Aden and the Red Sea, it should be noted that naval recommendations to switch off AIS are not based on credible figures. Both the EU-led and the US-led military operations have published data about the targeting of merchant ships transiting the area with or without AIS on.

These statistics, however, do not align with each other. Raw data used for the analysis has not been made public. The results are therefore at least questionable, underlined by misleading public statements from EU naval officers which have claimed that no ship with AIS off has been successfully targeted by the Houthis.

As indicated by the graph below, numbers available to Risk Intelligence show no substantial change in traffic pattern over the last months.





*Figure 3: Volume of cargo transported by cargo carrying vessels of 10,000 dwt+ active in the Red Sea*  
( Source : L l o y d ' s L i s t I n t e l l i g e n c e / S e a s e a r c h e r )

Overall, there is no evidence to suggest that switching off AIS lowers the chances of vessels being targeted. It may in some cases limit the success rate for missile attacks in particular, but this does not necessarily apply to attacks conducted by aerial or naval drones. Moreover, not broadcasting AIS may complicate efforts to support a ship after an attack. Less than 10% of merchant ships transiting through the Bab el Mandeb are conducting their voyages without AIS. This figure has not changed significantly during the Houthis campaign.

# Guidance on commercial operations

## Ship transits

Several shipping industry organisations have published the "Interim Industry Transit Advice, Southern Red Sea and Gulf of Aden – September 2024". Among other information, the document includes considerations about routing and vessel hardening. The Joint Maritime Information Centre has also issued bridge emergency reference cards in October 2024. Finally, a new "BMP Maritime Security" document was released in March 2025, detailing new measures applicable to Red Sea transits.

All documents are available via [www.maritimeglobalsecurity.org](http://www.maritimeglobalsecurity.org).

## Vessel registration and incident reporting

It is strongly recommended for all merchant ships transiting the Western Indian Ocean, the Somali Basin, the Gulf of Aden, Gulf of Oman and the Red Sea to register with UKMTO and the Maritime Security Centre Indian Ocean (MSCIO). Any incidents or suspicious activities should also be reported to UKMTO and MSCIO.

### Contact details UKMTO

Email: [watchkeepers@ukmto.org](mailto:watchkeepers@ukmto.org)  
Phone: +44 2393 222060  
Website: [www.ukmto.org](http://www.ukmto.org)

### Contact details MSCIO

Email: [postmaster@mscio.eu](mailto:postmaster@mscio.eu)  
Phone: +33 298 220 220 or +33 298 220 170  
Website: [www.mscio.eu](http://www.mscio.eu)

If a vessel is under attack, **US naval forces in Bahrain** are able to coordinate assistance.

Phone: +973 1785 3879  
Email: [m-ba-navcent-ncags@us.navy.mil](mailto:m-ba-navcent-ncags@us.navy.mil)

Combined Maritime Forces also recommend ignoring VHF calls by "Yemeni navy" with instructions to alter course to Hudaydah or other locations in Yemen. When merchant ships are contacted, masters are advised to continue the voyage and call for a coalition warship on VHF Channel 16, stating current location, situation and intentions.

In addition, vessel operators are advised to contact the respective flag state for additional guidance or requirements regarding incident reporting procedures.

## Mitigation measures

Risk Intelligence strongly recommends merchant ship operators to assess whether the respective vessel has been owned or managed by Israel-affiliated companies in the past. Such information may not have been updated in publicly available databases and could lead to misidentification of current commercial links with Israel.

Prior to voyages through the Red Sea and the Gulf of Aden, ship operators should conduct a thorough ship and voyage-specific threat and risk assessment in line with shipping industry best practices. In addition, the following measures should be considered:

- Constant monitoring of the security situation, enabling vessels to avoid locations with recent or ongoing incidents.
- Introduction/update of contingency plans on the company level to address the possibility of seafarers being injured, killed or kidnapped during a security incident. The plan should include contingency and emergency plans; appropriate drills should be completed.
- Crew briefings and scenario drills based on a valid and relevant anti-attack plan to ensure that incidents are reported and alarm is raised without delay when required. Drills should include scenarios with major damage and casualties.
- Enhancement of firefighting, evacuation and damage control procedures, taking into account the possibility of significant damage as a result of direct targeting or collateral damage.
- Enhancement of medical equipment to deal with multiple casualties.
- Emergency contacts placed readily available on the bridge.
- Bridge team briefing regarding hailing/harassment via VHF, prepared responses and immediate contact with naval forces in the respective area. (Local authorities' calls on VHF may be an act of spoofing or even targeting, underlined by several incidents in recent days which involved self-proclaimed 'Yemeni authorities' or the 'Yemeni navy' ordering merchant ships to alter course.)
- Preparation of citadel with emergency provisions and functioning satellite phone.
- Depending on individual circumstances, embarkation of armed guards may be useful to mitigate specific risks, specifically in relation to the threat of boardings from small boats (e.g. Houthi forces, Somali piracy). However, the threat of direct targeting by missiles, aerial or naval drones used by Houthi forces in Yemen (southern Red Sea / Gulf of Aden) cannot be mitigated by embarkation of armed guards.

New and reinforced BMP "Maritime Security" guidelines were published in March 2025, offering guidance in mitigating current threats such as attacks by missiles, drones or waterborne IEDs ('drone boats') as well as pirates. The new and updated guidelines reflect the current threats faced by vessels navigating through the Bab el Mandeb and provide a firm starting point for mitigation measures to be conceived and implemented. Vessel-specific considerations are still recommended.

Ship operators should also consider developing adapted procedures for transits through the Red Sea and/or the Gulf of Aden. This guidance should consider specific scenarios (e.g. aerial or waterborne threats, hailing on VHF) and include actions by the crew to minimise the impact of any security incidents.

## Red Sea – threat assessment (summary)

There is a high threat of insurgency operations carried out by Houthi forces in Yemen affecting merchant traffic in the southern Red Sea. The Houthis may seek to strike vessels with air and sea-borne drones or missiles. These strikes have been concentrated off Yemen's west coast and in the western Gulf of Aden. Certain ships, such as those linked to Israel by Houthi determination, are highly likely to be targeted. A maritime campaign was started in November 2023 in reaction to the 7 October offensive in Gaza.

In the first incidents to take place in the Red Sea in 2025, the bulk carriers MAGIC SEAS and ETERNITY C. were attacked on 6 and 7 July respectively. Both attacks involved small craft as well as more heavy ordnance, though limited airborne means beyond a single missile. Reporting suggested that in both cases the managers had other vessels trading into Israel. It is not yet clear as to whether these were isolated incidents or the resumption of a more systematic Houthi campaign.

The maritime campaign was suspended on 19 January 2025, but not formally ended, and the 6 July attack was the first apparent maritime strike against civilian shipping since December 2024. The primary threat currently is from collateral damage as Houthi and US/Israeli assets exchange ordnance in the area. The US had resumed a campaign of aerial bombing for a few months after Trump's return to power, though this was suspended in January 2025. It is unclear which group of vessels the US-Houthi ceasefire deal applies, though it does not appear to extend beyond US vessels.

Israeli attacks on Iran during June did not have an impact on the situation in the Red Sea, with the Houthis already launching missiles against Israel. The Houthis threatened retaliation following US strikes against Iranian nuclear facilities overnight on 21-22 June, but no specific actions took place. It is unknown whether the Houthis intend to resume attacks against US forces, having signed a ceasefire with the US in May 2025.

Israel and the Houthis are still engaged in a cycle of retaliation strikes which maintains a high threat level in the southern Red Sea. On 12 March 2025, the Houthis had threatened to resume strikes against "Israeli vessels" in retaliation for Israeli policy. Houthi attempts at missile and drone strikes against Israel are expected to continue in the medium term.

Overall, while the conditions for a return of shipping have begun to appear, there is still some way to go before a return to the pre-campaign normal. The shipping industry must be convinced that the current lull in attacks is not just temporary. Notably, political considerations in Yemen must favour a continued cessation of Houthi strikes at sea. The latest progress may easily be inverted, particularly given political pressure in Israel to continue the fighting in Gaza.

Maritime security in the southern Red Sea is also affected by the conflict in Yemen as some fighting between the Houthis and the rival government supported by the Saudi-led coalition continues. The maritime dimension to this conflict is limited as diplomacy continues. The threat

level for direct attacks against port and oil facilities in Saudi Arabia and the UAE is moderate while talks continue.

There is a dispute between Yemen and Eritrea in the Hanish Islands area, primarily due to fishing. Due to the irregular nature of Yemeni coastguard forces, or the difficulty in identifying Eritrean craft (which are small speedboats), there are problems with merchant vessels misidentifying small patrol craft from Yemen and Eritrea as pirate vessels. Aggressive enforcement by coastguard vessels, or local craft attempting to warn away merchant vessels, are possible threats in the area. The piracy threat is minimal, even in southern areas, as this area is now considered to be outside the operational range of Somali pirates. The fighting in Sudan is not expected to affect threat levels in the Red Sea, though increased and indiscriminate jamming in the waters between Port Sudan and Jeddah pose a threat to navigation.

## Threat levels

Refer to the section "Methodology / Definitions" for a definition of threat levels. A concise assessment of all threats listed in the table can be found on the Risk Intelligence System.

Threat type	Threat level
Terrorism	Moderate
Piracy	Low
Insurgency and Military Operations	High
Cargo Theft	Moderate
Smuggling	Elevated
Stowaways and human trafficking	Low
Fraud and corruption	Low
Activism	Low

## Persian Gulf – threat assessment (summary)

This assessment covers the Persian Gulf including the Strait of Hormuz and approaches through the Gulf of Oman. The primary maritime threat are actions taken or supported by Iran to threaten merchant ship transits or port and anchorage areas. The current threat level is elevated, but higher for vessels linked to Israel and the US given current developments in the conflict between Iran and Israel.

On 13 June 2025, Israel started a wave of strikes in Iran. Dozens of targets across Iran, some related to the nuclear programme, and other civilian and military facilities, were struck by the Israeli Air Force. Unprecedented overnight strikes were conducted on 21-22 June 2025 by the US against Iranian nuclear facilities to limited effect. This prompted Iranian lawmakers gathered on 22 June to vote on closing the Strait of Hormuz, which did not materialise before the ceasefire of 24 June. The events have marked a turning point in the Middle East's recently bloody history.

The March 2023 deal between Saudi Arabia and Iran is expected to have a longer-term impact on threat levels in the Persian Gulf, as well as the substantial Chinese interest in maintaining unimpeded access to the region's ports. It is possible that future Iranian actions will occur mainly south of the Strait of Hormuz, in an effort by the Iranians not to provoke Saudis. Seizure patterns since March 2023 support this assessment, although this might be under increased pressure as US and Iranian operations in the area escalate.

Aggressive enforcement by Iran of its waters is expected to continue. Surveillance, harassment and detentions of merchant vessels are frequent. This enforcement might be linked to specific goals, such as preventing fuel smuggling, but also to demonstrate naval capabilities. Seizure and detention of vessels might take place related to specific political and commercial disputes, and Iranian retaliation to incidents affecting its own shipping operations.

There has been an increase in naval patrolling in the area by a number of countries in response to the current threat situation, improving responses to incidents affecting vessels. The US initiative of the International Maritime Security Construct (IMSC), headquartered in Bahrain, includes Coalition Task Force (CTF) Operation Sentinel to provide naval patrols and coordination for sea lanes in the area. The EU has ended the EMASoH mandate, and transferred its responsibilities to Operation ASPIDES, whose mandate now covers an area of operations including the Arabian Sea, the Gulf of Oman and the Persian Gulf.

Other threats are typically low to moderate. Pirate groups are not present in the area, although low-level disputes between fishing fleets and criminal groups engaged in maritime crime are possible. There is also a substantial volume of local traffic, including small craft engaged in smuggling. These are often mistaken for other threats and may manoeuvre close to merchant vessels to use them as cover against detection by vessels from their activities.

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Cargo Theft	Low
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Stowaways and human trafficking	Low
Fraud and corruption	Low
Activism	Low

## Indian Ocean – threat assessment (summary)

This area covers the western Indian Ocean (north of Madagascar, east towards India), including the Somali Basin, Gulf of Aden, and western Arabian Sea. Houthi operations targeting merchant ships in transit can take place in the western Gulf of Aden where threat levels are similar to the southern Red Sea. In the Indian Ocean, there is an elevated threat of piracy off Somalia and a moderate drone threat to merchant ships in the Somali Basin, Gulf of Oman and the Arabian Sea.

The drone threat is currently moderate following the Houthi announcement on 19 January 2025 that trade through the Red Sea and the Gulf of Aden would re-open for all categories except Israeli-flagged vessels or vessels directly owned by Israeli entities. A re-start to the Houthi campaign is possible, based on Houthi perceptions of Israeli actions or in response to US military action against Iran. However, the general targeting of merchant vessels is unlikely in the short term for the Indian Ocean. There are currently no other implications in the Indian Ocean of the Israeli/US military operations against Iran and any possible Iranian response.

The threat of pirate operations in the Somali Basin and the Gulf of Aden is elevated. Recent cases show that pirates retain boarding capabilities at significant distances offshore, as far as 800 nautical miles from Somalia. Pirate activity declined through 2024, and activity has been reported infrequently in recent months. This might be due to a perception by the pirates that the risk vs reward calculation for targeting merchant vessels has changed. As such, the threat trend is downward.

There have been several reported boardings of fishing dhows off Somalia since November 2023, which continued through 2024 and into 2025. These boardings were likely linked to illegal fishing activity in the area, which is an ongoing issue and has been a focus for Somalia in expanding its maritime enforcement capabilities. Most current pirate activity is focused on these operations close to the Somali coast.

Merchant ships in transit should be aware of the potential to encounter small armed craft in this area, particularly the Gulf of Aden. These might be fishermen, traders, smugglers, militia or irregular military forces, or military or coastguard patrols operating out of southern Yemen or northern Somalia. Such craft might manoeuvre close to merchant ships while not presenting a threat.

Naval patrols operate in the area, such as EUNAVFOR's Operation Atalanta. Naval mandates include maritime crimes (such as drugs and arms smuggling) as well as countering piracy. The group transit scheme for the Gulf of Aden is still operational. National deployments are also ongoing, such as the Indian naval presence which has been effective in recent actions.

Shipping industry associations have published transit guidance for the Gulf of Aden and the Red Sea, emphasising the importance of thorough ship and voyage-specific threat and risk assessments before passing through the area. UKMTO operates the Voluntary Reporting Area for the Indian Ocean, specifically the Red Sea, Gulf of Aden, and Arabian Sea. UKMTO acts as primary point of contact for merchant vessels and liaison with military forces in the region.



MSCIO (formerly known as MSCHOA) manages the EUNAVFOR (EU Naval Forces Somalia and Operation Atalanta) voluntary registration scheme for ships transiting the area and communicates EUNAVFOR counter-piracy guidance to the maritime industry.

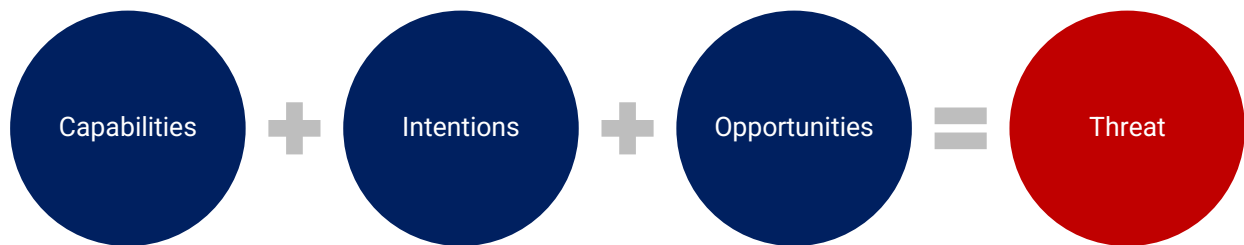
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Cargo Theft	Low
Smuggling	Moderate
Stowaways and human trafficking	Low
Fraud and corruption	Low
Activism	Low

## Methodology / Definitions

All threat levels are based on the likelihood of a threat type occurring, with generic consequences described in the relevant sections. All threat levels are based on an assessment of capabilities, intentions and opportunities of potential perpetrators, separated into different categories.



Maritime operators are typically unable to lower the threat level by influencing the underlying variables. However, all variables are subject to change over time, e.g. changes in the intentions or capabilities of potential perpetrators. They should therefore be re-assessed as required.

In an additional step, the threat levels assessed here can be used to identify the risk level for a particular type of operations. Determining the risk level also requires an assessment of the vulnerability and the potential consequence of a particular incident. Appropriate mitigation measures can then be implemented to lower the risk level.

### Threat levels

All threat levels mentioned above are assessed based on the likelihood and consequence of a particular threat type occurring. The levels are:

- Low: Not expected in the operational area or in proximity.
- Moderate: Not expected in the operational area but possible in proximity.
- Elevated: Possible in the operational area or in proximity.
- High: Expected in the operational area or in proximity.
- Severe: Commonplace in the operational area or in proximity.

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