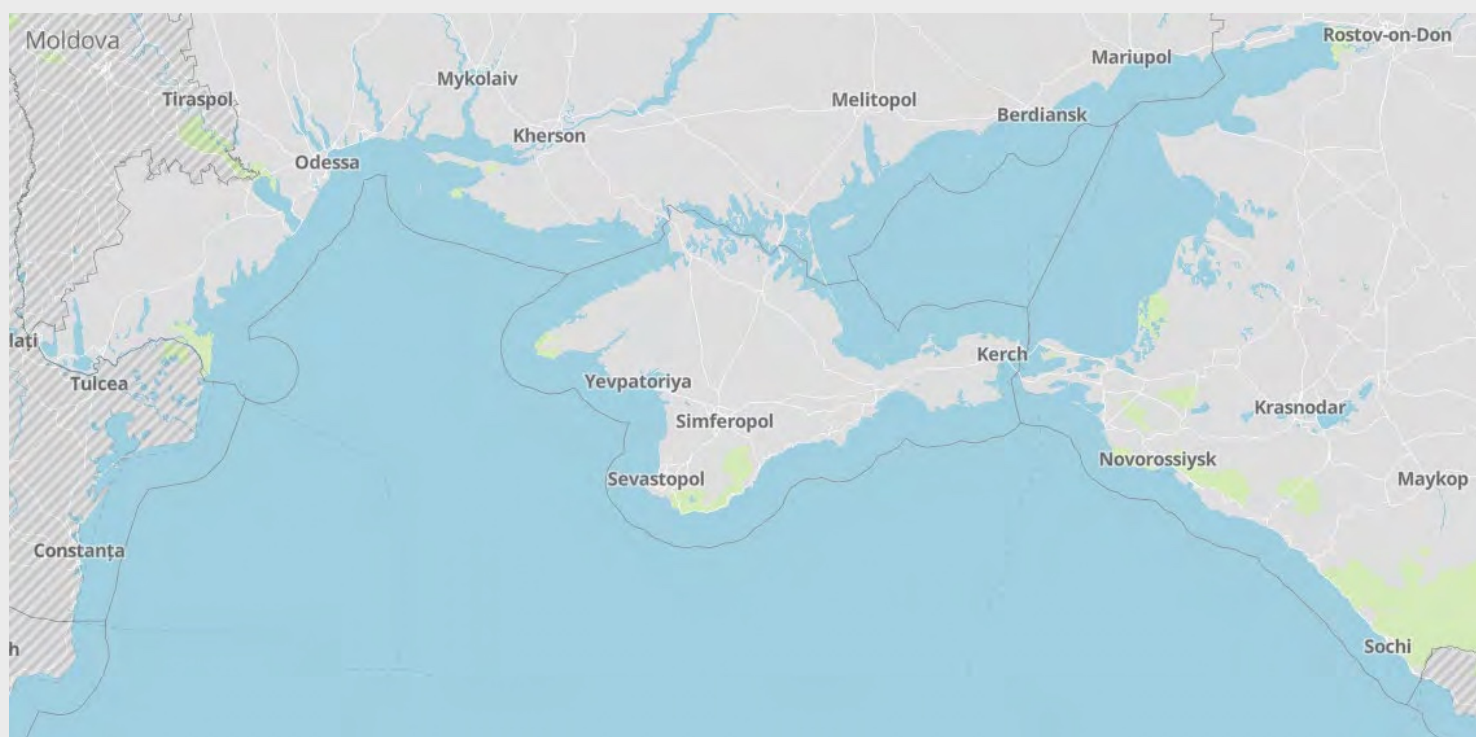


# Northern Black Sea and Russia (Ports and Terminals): Weekly Intelligence Report

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# Overview of current situation

## Brief update:

During the past week Russian forces have continued to target Ukrainian infrastructure, focussing on the capital Kyiv. However, there are no developments during the reporting period which change the overall threat picture.

Although the past week has seen ongoing Russian attacks throughout Ukraine, the attacks have not been on the same scale as previous week. The Russian forces also appear to have concentrated on the capital Kyiv and targeting housing and transportation. Port operations are not reported to have been impacted by attacks during the past week and vessels are understood to continue to transit the Ukrainian Black Sea corridor. However, as previous pauses in targeting ports and port cities, have indicated, this does not necessarily indicate a change in the future attacks by Russian forces and therefore the general threat level remains unchanged as future attacks cannot be ruled out.

US president Trump announced that he intends to shorten the earlier announced 50-day deadline for a ceasefire or peace-agreement to be reached, between Russia and Ukraine, to 10 or 12 days. It is unclear from when the new deadline would take effect and indeed what will actually happen if Russia does not comply. Given that Russia is reportedly the most sanctioned country in the world, further sanctions seem unlikely to have much impact. Furthermore, as long as Russia sees it is making progress along the contact-line, regardless of the cost, it is unlikely to engage earnestly in any negotiations.

There have been large countrywide demonstrations against a law recently signed by president Zelenskyy, which it was reported would limit the impartiality of two anti-corruption bodies. Political pressure also came from Ukraine's international supporters, with the EU stating that certain financial support could be withheld if a new law, reinstating the independence of the two anti-corruption agencies, was not passed. It appears the criticism has been listened, with the Ukrainian parliament, on 31 July, voting in favour of a

new law which it is said would secure the independence of the agencies.

The current scenarios for targeted attacks against vessel are:

**Scenario 1:** Vessels can be targeted due to flawed intelligence from the Russian military, suggesting they carry military hardware.

The likelihood of this has dropped considerably since the US stopped supplying weapons to Ukraine.

**Scenario 2:** Attacks may be aimed at deterring vessels from using the Ukrainian transit corridor and disrupting maritime exports by creating uncertainty and danger.

**Scenario 3:** Russia could target vessels to increase pressure on Ukraine to influence future negotiations.

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## Ukrainian Black Sea Corridor:

Vessels continue navigating the corridor to the open Ukrainian Black Sea ports, during the past week.

Strikes impacting vessels underway remain assessed as less likely to occur, as this would require direct targeting. Based on previous incidents involving vessels, indicate that the likelihood of collateral damage while in Ukrainian ports remain greater, and future incidents involving commercial vessels—whether from collateral damage, debris, missile misidentification, or potential direct targeting—cannot be ruled out.

The Ukrainian Black Sea corridor and ports operate under IMO Circular Letter 4748 and local guidance, though operational differences should be expected.

Operational disruptions such as power outages and air raid alarms are likely, until security improves. An elevated threat to maritime trade in the NW Black Sea and near the conflict area persists due to possible Russian actions against vessels and port infrastructure.

## **Black Sea:**

War-related developments, during the past week, do not change the threat picture for the Black Sea region, with the north-western area still an active war zone.

The security situation varies within the Black Sea, with lower threats to maritime operations in the southern half. Potential harassment, AIS/GPS signal jamming or spoofing, and the use of warning shots remain possible. Ukrainian forces are expected to continue pressuring Russian forces in the Black Sea, including in and near Crimea, in order to achieve greater control over the maritime domain to secure future shipping corridors to Ukrainian ports.

Russia, despite reduced naval capabilities in the Black Sea and the Sea of Azov, maintains a presence that can deploy mines or munitions into the Black Sea. Submarine deployment will be influenced by Ukrainian anti-ship capabilities. However, under current conditions, Russia is unlikely to enforce any blockade or inspection regime in the north-western Black Sea. Although the overall usage of naval drones, both on surface and submerged is likely continues to increase by both sides, the deployment, as part of military operations, do not, in of themselves present a change to the current threat picture to maritime operations.

The threat of sea mines persists in the wider Black Sea, with ongoing Mine Countermeasure (MCM) operations conducted by Romania, Bulgaria, Turkey, and Ukraine. Russian and Ukrainian military activity in the Black Sea, underlining the continued threats posed to shipping in the area. War-related implications, such as varying degrees of naval presence, congestion at regional straits and ports, sanctions on trade to and from Russia, and complications with crew changes, have become more common since Russia's withdrawal from the UN-backed Black Sea Grain Initiative in July 2023.

## **Sea of Azov:**

The Sea of Azov is largely restricted for commercial traffic without Russian consent. Mariupol and Berdyansk ports, controlled by Russian forces, have unclear operational

statuses. Reports indicate stolen Ukrainian cargo is being transported from these ports.

Ukraine monitors vessels to occupied ports in the Sea of Azov and may consider them potential military targets. Russia has increased defenses around the Crimea bridge due to Ukrainian strikes. Non-Russian-flagged vessels face disruptions in the Kerch Strait, and Russia may prohibit vessels loaded outside its territory from transiting. Attacks on Russian Black Sea ports operating at ISPS level 2 are probable.

## **Ukraine:.**

Port information is located in the port table.

War-related developments, during the past week, does not change the overall threat picture for Ukraine. Power-outages and air-raid alarms continue throughout the country, which can also disrupt port operations. Concerns regarding the operational future of the country's energy network, including sufficient supplies and making the network more resilient to aerial attacks remain. Given the constant unpredictability, future disruption should be expected.

Although diplomatic focus and efforts continue to explore any possible solutions to ending the Russian war in Ukraine, it remains that until any form of a ceasefire is agreed and enforced, Russia is likely to use any pretext for future attacks on Black Sea maritime operations, if deemed useful to achieve their military or political objectives.

Martial law remains in place with some local night-time curfews. All Ukrainian ports are operating at ISPS level 3 following the communication to the IMO by the Ukrainian authorities.

## **Russia:**

Port information is located in the port table.

It is assessed that Ukraine has, to some degree, continued military activity in the Black Sea, with numerous Russian reports of engagements with unmanned naval drones in the Black Sea - with USVs reaching as far as Novorossiysk - as well as reports of attacks across Crimea. While the tempo of Ukrainian attacks against Russian energy and naval

infrastructure has diminished in the Spring of 2025, renewed waves of attacks over the summer against Russian targets is likely to occur.

Previous videos of naval and aerial drone attacks in Russian ports also highlights a general lack of advanced counter measures. Russian anti-air is often fired at near horizontal angles. This is likely to lead to damage to port facilities and vessels and may potentially also wound or kill sailors or port workers.

When using Russian ports other than those in the Black Sea, for example Arctic or Baltic Sea ports, it is possible that Russian authorities will try to recruit or coerce crews on visiting vessels with non-Russian flag or crew, to conduct sabotage of undersea cables by releasing the anchor and dragging it across cables or pipelines. Such cases of recruitment have not been confirmed, but it is possible given the ongoing Russian effort to conduct sabotage of undersea cables in the Baltic Sea, and the requirement for plausible deniability.

### **Conflict outlook:**

Recent developments along the frontline do not change the threat assessment in the northwestern Black Sea.

The recent political developments in Ukraine are important for several reasons. The country has been struggling with dealing with the widespread issues with various forms of corruption and it has brought down previous Ukrainian governments. Zelenskyy himself was voted in on an anti-corruption mandate – dealing with the issue was and is always going to be a difficult and slow process. The demonstrations are also important in the way the public show their involvement in the future of the country. There is a long tradition in Ukraine for large scale public protests and the recent demonstrations follow this tradition. While it is not impossible, that there were some genuine grounds for the law Zelenskyy signed which impacts the operational independence of two anti-corruption investigative bodies in Ukraine, following today's vote on a law to reinstate the agencies independence, the previous reasons become less important. It is likely that the international pressure and the nationwide demonstrations highlighted the

consequences of the first law, which had either not been expected or not considered at all.

The recent announcements by US president Trump to shorten the deadline for Russia to agree to a ceasefire or some form of peace settlement do not in of themselves change anything. The reason for this is that there is no ceasefire until there is, and until there is, there is none. Russia is reportedly the most sanctioned country in the world, so further sanctions are unlikely to make a big difference, which was also recently acknowledged by US president Trump. It therefore remains that a ceasefire or peace-agreement limited in scope, focusing on specific sectors such as energy or shipping, or geographical areas like the Black Sea, would seem the most likely initial prospect. However, it also remains that as long as 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 president Putin to include maximalist war objectives in ceasefire demands, thereby hindering substantial negotiations.

New sanctions on Russia could alter Black Sea security dynamics, with potential restrictions on EU, NATO, or Western-affiliated vessels accessing Russian ports. Detention and harassment of such vessels by Russian authorities are possible. The war has shown potential for broader hybrid warfare, with Western intelligence warning of increased Russian activities in Europe. Ukraine is also likely to continue to target Russian infrastructure beyond the Black Sea. Examples include "parcel bombs" at DHL sites and incidents involving Nord Stream pipelines.

**Annex 1 – Illustration of reported mined areas**

**Annex 2 – Announced temporary corridor from UKR Black Sea ports**

**Annex 3 – Reported Kerch Strait inspection area**

**Annex 4 – List of commercial vessel incidents**

**Annex 5 – Incidents**

## Ukraine and northern Black Sea ports

Refer to the following page for definitions and information on sanctions/commercial restrictions

Port	Current port situation	Current local situation	Operations	Security
<b>Odessa</b>	The port is understood operational in accordance with the IMO Circular Letter 4748, and local guidance.	Russian strikes do occur against critical infrastructure in the Odesa Oblast, including some direct targeting of Odesa city and port. Future attacks targeting Odesa port cannot be ruled out. The overall security situation remains highly unpredictable and local operational differences and issues should be expected. Disruptions to operations may occur due to power outages or air raid alarms.		
<b>Pivdenny</b>	The port is understood operational in accordance with the IMO Circular Letter 4748, and local guidance.	Russian strikes have occurred against targets in and near Pivdenny in the past, including targeting of the port. Future targeting in the area as part of military operations cannot be ruled out. The overall security situation remains highly unpredictable and local operational differences and issues should be expected. Disruptions to operations may occur due to power outages or air raid alarms.		
<b>Mykolaiv</b>	Closed. Cargo operations suspended for commercial operations.	In control of Ukrainian forces. Russian strikes against military targets and critical-infrastructure targets in or near the city do occur.		
<b>Mariupol</b>	Disputed operational status.	Controlled by Russian forces and part of annexed territory. Actual operational status is disputed with Russian authorities reporting the port to be open, although this is with very limited traffic prioritized by the Russian state. Reports indicate the rebuilding of the port facilities by Russian military and contractors.		
<b>Chornomorsk</b>	The port is understood operational in accordance with the IMO Circular Letter 4748, and local guidance.	Russian strikes have occurred against critical infrastructure in the Odessa Oblast. Future attacks targeting Chornomorsk port cannot be ruled out. The overall security situation remains highly unpredictable and local operational differences and issues should be expected. Disruptions to operations may occur due to power outages or air raid alarms.		
<b>Ukraine Danube ports</b>	Ukraine Danube ports are operating and handling ship calls via the Danube, and the Sulina and Bystre Canals.	Incidents involving mines have previously occurred in the Black Sea near the canals. Russian strikes against the ports in the Izmail region, do occur. Local weather conditions, water levels, and pilot shortages also impact maritime operations. ISPS Level 3 is in place, as communicated by the Ukrainian authorities. Delays and congestion have been reported in relation to port and canal operations.		

Port	Current port situation	Current local situation	Operations	Security
<b>Kerch Strait</b>	Open for navigation but only for authorized transit. Ports located within the Strait are reported to be operating.  Inspection regime and additional security measures are in place.	UKR naval drone or missile strikes against the Kerch Strait Bridge and nearby naval stations and critical infrastructure remain possible. Attacks are not expected to directly target commercial maritime traffic, but collateral damage cannot be ruled out. Russian defensive fire against drones may hit commercial traffic. Russia has announced transit restriction of vessels which are not loaded in Russian ports. Scrutiny against crew is possible *. See Annex 3 for reported Kerch Strait inspection area.		
<b>Russian Black Sea ports</b>	Open with restrictions. Additional security measures are in place.	Ports operating at ISPS level 2, some operational delays possible. Ukrainian attacks against naval or state-affiliated vessels, and port infrastructure, using naval drones, aerial drones, or cruise missiles, is possible. Collateral damage from drones may occur in case of incidents, and Russian defensive fire against drones may hit commercial traffic. Scrutiny against crew is possible *.		
<b>Russian Sea of Azov ports</b>	Open with restrictions. Sea of Azov is currently closed to unauthorized navigation by the Russian authorities. Additional security measures are in place.	Ports operating at ISPS level 2, some operational delays possible. Ukrainian attacks against naval or state-affiliated vessels, and port infrastructure, using naval drones, aerial drones or cruise missiles, is possible. Collateral damage from drones may occur in case of incidents, and Russian defensive fire against drones may hit commercial traffic. Scrutiny against crew is possible *.		
<b>Temporary corridor from UKR Black Sea ports</b>	Operational status is reported to be open, in accordance with IMO Circular Letter 4748 – though likely influenced by local operational circumstances in the NW Black Sea.	The corridor is reported to be running without considerable issues, although disruption following attacks are to be expected. Any tacit agreement from Russia on current transits are unknown, and further Russian acceptance is unclear if the increased tempo of Ukrainian strikes on Russian assets in the Black Sea continues. Military activity in and near the corridor is possible, collateral damage to vessels is possible.		
<b>Constanta</b>	Open.	Operating, with additional cargo diverted to Constanta due to closed Ukrainian ports. Congestion should be expected, and although this is being managed, it could lead to delays.		

\* Constraints and demands related to vessels with Ukrainian crewmembers. Russian crew with previous military service may be questioned by authorities withheld as part of Russian mobilization efforts. \*\* Risk Intelligence is not responsible for third-party content.



# Operations and Security definitions

## Operations:

**Green** – Operations in the area are ongoing normally with no significant issues.

**Yellow** – Some delays or disruptions in the area may be expected, which could be due to limitations to, for example, port operations and/or congestion in the area, or other difficulties with access or operating at the required ISPS level or complying with other procedures either at port or offshore.

**Red** – Operations have been significantly disrupted, and ports or areas might be closed or only partially operating due to restrictions, blockades, lack of functioning infrastructure, personnel disruptions, and access concerns, or other issues preventing all or most operations.

## Security:

**Green** – The area is secure and there are no direct or indirect security threats in the port vicinity or offshore area. Low threat to vessels/personnel.

**Yellow** – There are no direct security threats but there are possible indirect threats in the vicinity, particularly but not limited to conflict taking place in proximity either on land or offshore. Moderate threat to vessels/personnel.

**Red** – Direct threats are possible to the port or area and/or its immediate approaches, including collateral damage in the immediate area or direct attacks that could target infrastructure and vessels at berth/anchorages/underway. High threat to vessels/personnel.

## Note on sanctions and commercial restrictions

Sanctions and commercial restrictions are being imposed on Russia in response to its invasion. These sanctions are evolving and will affect ongoing business operations in many complex legal ways. Sanctions are being applied to individual Russians, business entities, and to certain Russian export products (such as oil products). There are also restrictions on specific nationalities (such as US citizens) engaging in certain activities, restrictions on payments (in certain currencies and through certain institutions), and restrictions on Russia's import of particular dual-use items and technologies. Port entry bans for Russian vessels are being implemented (in the UK, for example).

The fine print of sanctions and restrictions might affect chartering arrangements in unexpected ways, depending on the connection to Russia. These issues, as well as insurance issues for operating in war risk areas, are not covered in this report and might need to be assessed separately to reduce the risk of exposure.

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# Annex 1:

## Reported mined areas



*Risk Intelligence (Illustration for visual guidance only)*

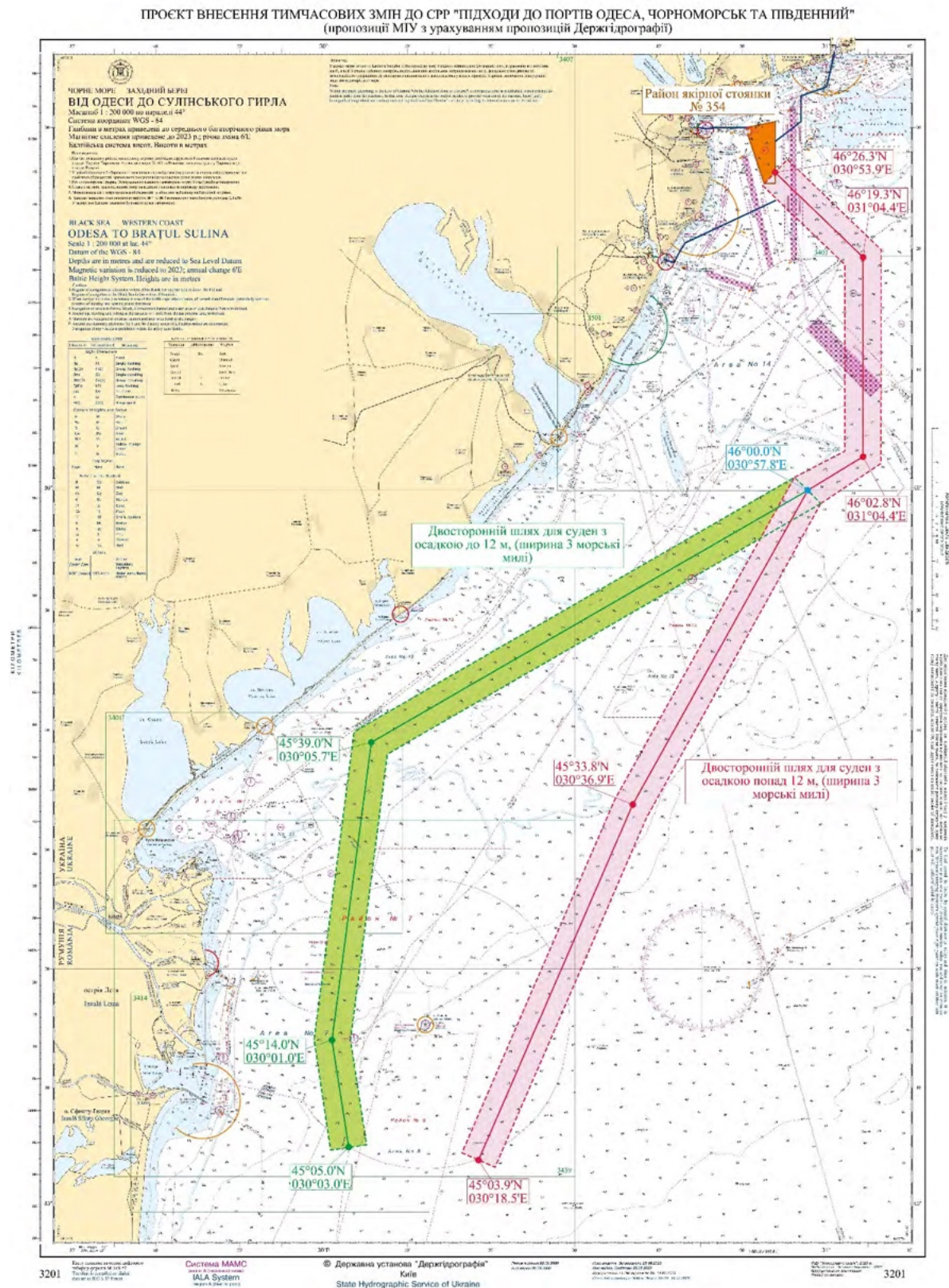
NAVAREA III: See above for visual guidance on mined areas according to the Spanish flag administration (NAVAREA III 0092).

Mined areas are most likely a combination of deeper sea mines and shallow water mines for anti-amphibious operations as well as on beaches. Mines in the sea are most likely cabled or anchored and under control.

Please also note that active NAVAREA III warnings include a warning of possible drifting mines (NAVAREA III 0122) for Northwest, West, and Southwest areas of the Black Sea.



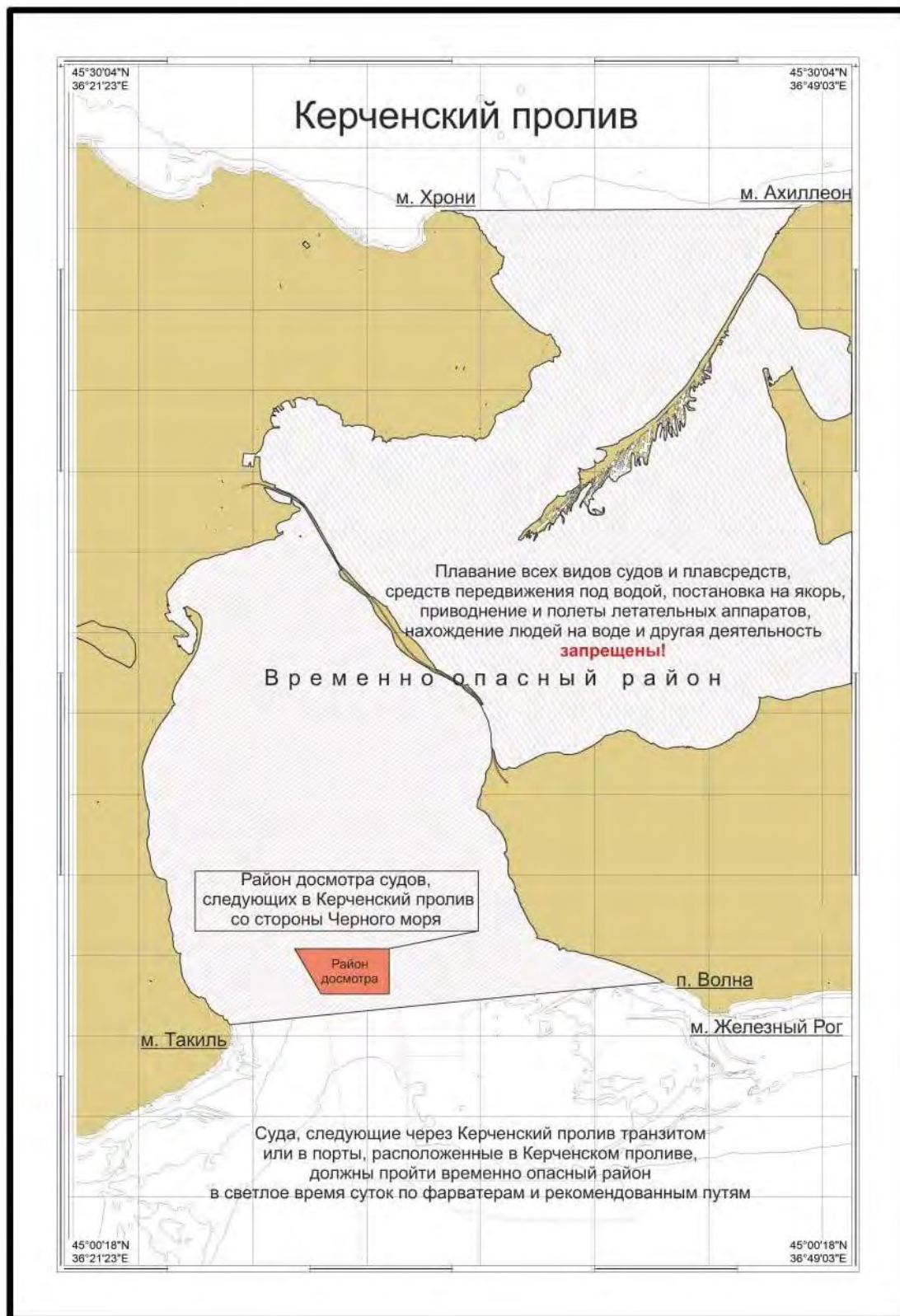
## Annex 2:



The above chart shows the announced temporary routes for civilian vessels to and from Ukrainian Black Sea ports. The Ukrainian Navy emphasizes that war risks, including mines, remain. Further details can be found in the IMO Circular Letter No.4748 (Source: IMO Illustration for visual guidance only)

## Annex 3:

Reported Kerch Strait inspection area, as announced by the Russian authorities 02 August 2023.



## Annex 4:

Black Sea commercial vessel incidents: Latest 10

Date	Name of ship	Type	Flag
03 JUL 2025	AJ ROSE	Bulk carrier	Sao Tome and Principe
11 MAR 2025	MJ PINAR	Bulk carrier	Barbados
01 MAR 2025	SUPER SARKAS	Bulk carrier	Siera Leone
01 MAR 2025	MSC LEVANTE F	Container ship	Panama
14 OCT 2024	NS MOON	Civilian vessel	Belize
14 OCT 2024	OPTIMA	General cargo vessel	Palau
09 OCT 2024	SHUI SPIRIT	Container ship	Panama
07 OCT 2024	OPTIMA	General cargo vessel	Palau
05 OCT 2024	PARESA	General cargo vessel	St. Kitts and Nevis
20 SEP 2024	GOLDEN LION	General cargo vessel	Antigua and Barbuda

## Annex 5:

No maritime related incidents during the past reporting period.