



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:

Cocaine trafficking: Persistent concern for ship operators

Introduction

Cocaine trafficking across the Atlantic is a significant concern for many shipping companies. It poses a direct threat to crews and operations, with possible detentions of vessels and cargoes as well as crew members during an investigation. It also represents a reputational risk for the companies involved. Moreover, drug trafficking can be linked to other types of illicit activities.

To provide ship operators with the necessary background information to plan or update internal policies and guidelines, Risk Intelligence publishes frequent reports about current trends and patterns. The most recent version, published in July 2025, highlighted a range of important issues:

- Most container seizures take place before cocaine leaves the Americas, highlighting law-enforcement efforts in Latin America to target the cocaine trade across the region. Panama continues to stand out as a key chokepoint for drug seizures as major seaports at both ends of the Panama Canal remain frequent transit points for transpacific and transatlantic trade.
- Merchant ships, primarily – but not exclusively – container ships, account for most cocaine seizures outside of the Americas. Usually, lower quantities of drugs are smuggled to transshipment points in the Caribbean or Central America from where drugs are then sent to Europe.
- In Europe, most seizures are made in shipping containers. These seizures can have a direct impact on merchant ships. The discovery of cocaine can result in the detention of ships and crew during the investigation, leading to operational delays, lengthy legal proceedings, and additional costs. Drug trafficking groups regularly recruit and/or coerce regular shipping employees to support their operations.
- Western Europe remains the primary destinations for cocaine shipments, followed by southern Europe. However, seizure figures indicate a diversification of ports in Europe. Reports from Belgium and the Netherlands highlight growing concerns as customs officials and port workers face escalating recruitment attempts by criminal groups, and a large number of arrests of so-called drug extractors.
- Seizures in the second quarter of 2025 highlighted at least two unusual cases. Panamanian authorities reported the interception of nearly 5 tonnes of cocaine bound for India, while a total of 5.5 tonnes were found to be bound for the United Kingdom. While interest from these destinations is not unusual, the increased volume of drugs being shipped indicates either expanded logistical capabilities on-site or new incentives to redirect unexpectedly larger quantities.

Another important issue is the use of semi-submersible vessels by drug trafficking groups. The seizure of an unmanned surface vessel (USV) off Colombia, capable of carrying 1.5 to 2 tonnes of cocaine, constitutes a technological innovation, described in further detail below.

Smuggling routes

Data collected by Risk Intelligence shows that cocaine seizures with a maritime link – i.e. in ports or on vessels of any kind – declined in the second quarter of 2025 compared with the previous reporting period (203 tonnes of cocaine in Q2, 225 tonnes in Q1). Most drug seizures were reported in South and Central America, which maintains the general trend of cocaine shipments being intercepted before reaching their destinations or major transshipment points.

South America reported the highest number of individual seizures as well as quantities of cocaine seized in Q2 with 70 seizures (35% of the worldwide total) and over 84 tonnes (41.5% of the total), followed by Central America which reported 60 seizures (30%) and almost 71 tonnes (35%).

European ports reported 36 seizures (18%) and 28 tonnes (14%). Most European seizures were reported in western Europe, which accounted for 18 events and 13 tonnes seized, followed by southern Europe, which reported 13 seizures and 8.7 tonnes. This pattern aligns with the general trend as western and southern European ports are generally the preferred destination of drugs concealed in merchant ships. It should be noted, however, that a considerable number of drugs are not being reported as information is not made public by port officials, European governments, and other relevant stakeholders.

The Caribbean continues to stand out as a relevant transshipment point. Although current figures would place the Caribbean as a hotspot for drug trafficking above some European subregions, many incidents there involved the use of go-fast boats, fishing vessels, and even leisure craft, in contrast to the use of containerised cargo or compartments of merchant vessels elsewhere.

First unmanned semi-submersible vessel seized



Unmanned semi-submersible vessel seized by the Colombian Navy in April 2025 (Photo: Colombian Navy)

In early July, the Colombian Navy (ARC) announced the seizure of an unmanned surface vessel (USV) off the coast of the Tayrona National Natural Park. There was no cocaine seized on the scene as the USV was intercepted during sea trials.

According to the ARC, the USV is a fiberglass vessel with the capability to operate between 500 and 800 nautical miles. Since the craft does not require any crew, it has additional space which allows it to carry between 1.5 and 2 tonnes of cocaine. Additional features include two antennas connected to a Starlink modem.

The vessel is the first of its kind for drug trafficking purposes. It highlights the willingness of criminal organisations to embrace technological advancements and outpace security forces. This incident also raised concerns as previous semi-submersible vessels were spotted either while sailing at sea or at clandestine artisanal shipyards hidden in jungle terrain. However, this event indicates that criminal organisations were undeterred and tested the USV in an area between two major domestic tourist destinations and in vicinity of a national park, whose waters are constantly being monitored by the ARC due to the frequent movement of vessels intended for passenger tourism services.

It should be noted that smugglers have been cautious on changing smuggling methods in the past, especially for vessels that require more complex planning and coordination. This is the case for fully submersible vessels or other prototypes of unmanned vehicles. Like the USV seized off Colombia, these vessels could grant traffickers the ability to reduce the threat of apprehension, to operate smuggling vessels remotely, or to reduce the risk of detection.

Nonetheless, there is currently no evidence of transnational criminal organisations expanding the use of such craft despite the potential benefits. Instead, the prevailing trends indicate that innovation is not the primary motivating factor behind large-scale smuggling activities.

Conclusion

The production of cocaine has reportedly reached record levels in recent years, with over 2,700 tonnes in 2023, a trend that likely continued through 2024 and into 2025 for several reasons. Data suggests that the cultivation of coca leaf is expanding in multiple hotspots in Colombia, the world's leading cocaine producer.

While variations in coca bush cultivation remain volatile, the area under cultivation is expected to continue to grow in northern Peru and to a lesser extent in rural areas of Honduras and Guatemala. Finally, the emergence of new cocaine laboratories in Central America, Mexico, the United States and Europe poses an incentive for drug traffickers to increase the commercialisation of coca paste.

At the same time, consumption appears to be growing as well. In 2024, wastewater studies were conducted in 66 cities across Europe. The results revealed a marked increase in cocaine residue in 49 of these cities, indicating a widespread and growing pattern of use. These findings align closely with seizure data and treatment admissions.

Overall, it is therefore very likely that cocaine smuggling will remain a complex issue in the coming years. The impact on shipping companies is set to continue or even grow as drug trafficking organisations are constantly adapting their methods. It is therefore vital for shipping companies to maintain an overview over emerging trends and patterns to prevent – or at least limit – their exposure to cocaine smuggling.

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.

Update: Maritime dimensions of the war in Ukraine

Situation on land

In July, Russian forces continued to target Ukrainian civilian infrastructure throughout the country. Odesa Oblast and the city itself were particularly often targeted. These attacks also resulted in an incident involving the Sao Tomé and Príncipe-flagged bulk carrier AJ ROSE, which was reportedly struck during an attack on Odesa.

The missile was allegedly carrying a cluster warhead, usually used to cause damage to a larger area, which is possibly why the AJ ROSE was damaged – indicating that the vessels were not targeted specifically, although this can also not be ruled out given the use of cluster munition and that Russian forces are likely to have been aware of the ship's presence in the port at the time.

Odesa has regularly been struck with both drones and missiles during the war. Recent attacks do not change the threat picture. An apparent change to the approach in the attacks by Russian forces during July has been to launch attacks during daylight hours.

Mykolaiv Oblast was also attacked in July, with local officials citing damage to some of the port infrastructure. Both attacks underline that a pause in the targeting of ports does not indicate that ports will not be attacked again and is no guarantee against future attacks.



*Ukrainian president Volodymyr Zelenskyy visit to Denmark on 3 July 2025.
(Photo: Ukraine Presidential Office)*

Although there has not been much territorial movement during the month, fighting continues with both sides probing the other's defences to try to locate weak spots and gain some offensive advantage. July saw a new record in Russia's aerial attacks with a reported 728 drones being fired towards Ukraine during the night between 8 and 9 July. Ukrainian forces claimed to have

shot down the majority. Russian forces are likely continuing to stress Ukrainian defences and the civilian population and will likely continue large-scale drone attacks.

Ukrainian president Zelenskyy was the cause of the largest protest gatherings in Ukraine since Russia's full-scale invasion in February 2022. The reason was the signing of a new law which would curb the independence of the country's two anti-corruption agencies. The alleged reason for the law was that the two agencies would be investigating people close to the government and Zelenskyy himself.

However, widespread protests and international pressure – including from the EU which said that certain funds would not be made available if the new law came into effect – led to Ukraine's parliament eventually passing another law to restore the independence of both anti-corruption bodies. The ultimate outcome for Zelenskyy remains uncertain and may not be resolved until after the government's summer recess ends in September.

Diplomatic activity increased in July, with several meetings between Ukrainian delegations and various contact groups, including the EU and the US. Furthermore, the meeting between US president Trump and Zelenskyy during the NATO gathering in June appears to have been the beginning of change in stance by the US administration towards the war in Ukraine with deadlines being placed on Russia to agree to ending the war.

During a mid-July meeting with NATO Secretary General Mark Rutte, in Washington, Trump announced he would impose sanctions on Russia if president Putin didn't agree a peace deal within 50 days. This was shortened to 10-12 days in late July, although it is uncertain from when this deadline is counted.

Notwithstanding the uncertainty regarding dates and deadlines, the apparent change in the US approach towards the war in Ukraine with further military supplies to NATO, which can then be passed on to Ukraine, is significant. Ukraine and Russia also held talks in July in Istanbul. The short meeting lasted less than an hour and only resulted in a prisoner swap and the return of the bodies of soldiers. It is likely that both parties merely agreed to the meeting to appease the Trump administration, for each of their own advantages.

Risk Intelligence also offers a comprehensive 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

Although Russia continues to make incremental gains at various points along the contact line, reports note that Ukrainian forces are still capable of pushing the Russians back and hold their defences as well. It is therefore uncertain whether Russian advances are due to Ukrainian forces strategically withdrawing. Ukrainian forces still rely on US involvement on certain weapons systems which means that US engagement in the war remains vital to Ukraine. It can therefore be viewed as a diplomatic win for Ukraine that the US will not prohibit weapons deliveries to NATO to be passed on to Ukraine.

The various deadline announcements regarding further sanctions on Russia do not directly change anything regarding a future ceasefire. Russia is reportedly the most-sanctioned country in the world, further sanctions are therefore unlikely to make a big difference which was also recently acknowledged by US president Trump. A limited ceasefire or peace agreement, focusing on specific sectors such as energy or shipping, or geographical areas like the Black Sea, therefore still seems to be the most likely initial prospect.

However, for 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, hindering substantial negotiations.

The ability of Russia to threaten and successfully attack Ukrainian civilian infrastructure, including ports, remains dependent on Ukrainian capabilities to protect these facilities. The effectiveness of Ukrainian military operations will remain dependent on its ability to maintain its own arms production and ongoing support from its partners.

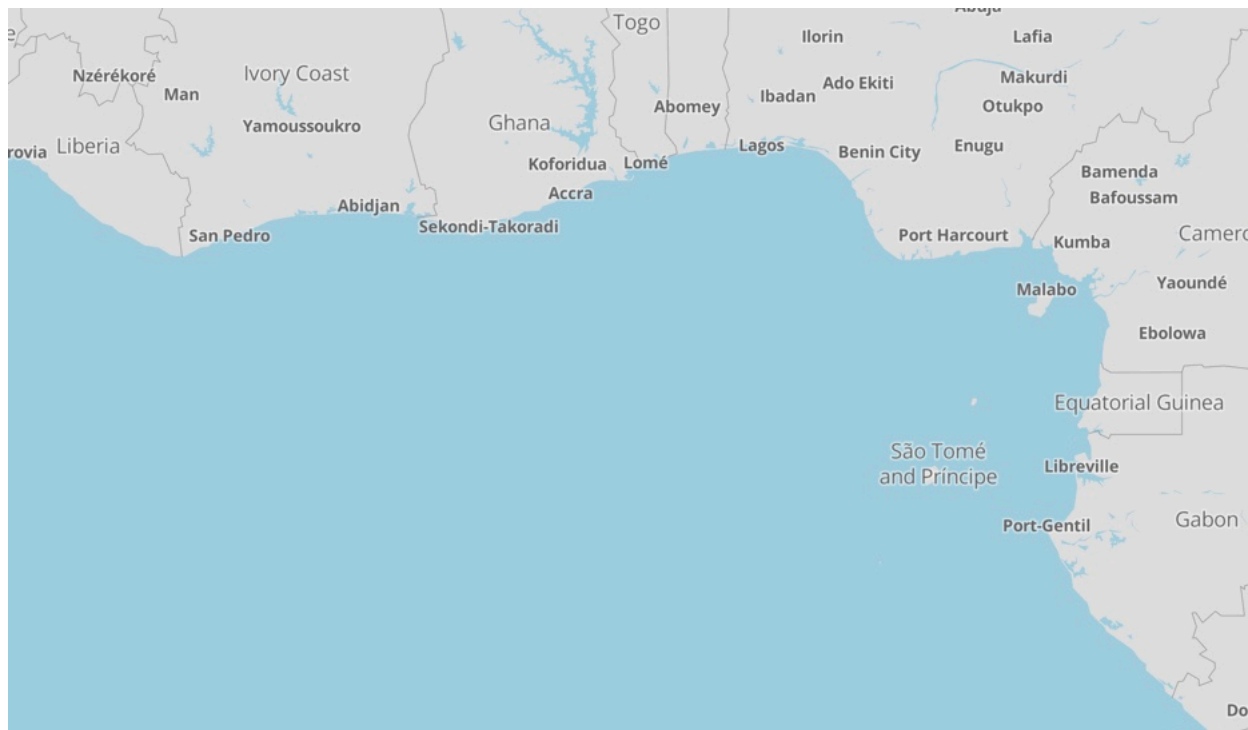
Further information

Risk Intelligence provides a regularly updated 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 July 2025, shown on the map below. Further incident details are available on the Risk Intelligence System.



Incidents

No incidents were reported in July.

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. While there have been no incidents in recent weeks, the threat was underlined in May by the boarding of a reefer in around 110 nautical miles from the Nigerian coastline.

In late July, MDAT-GoG also issued a warning regarding an alleged pirate group operating off the Niger Delta coastline. However, it should be noted that similar warnings in the past have not resulted in attacks against merchant ships as these warnings are based on a limited understanding of the broad range of illicit activities at sea in the region.

These activities have also been highlighted by several attacks against merchant ships over the past 12 months. While these incidents have been widely reported as piracy, most vessels had shown suspicious operating patterns prior to being attacked. It is very likely that many cases were closely connected to illicit operations rather than pirate attacks against random targets. Overall, it is vital to carefully analyse all security-related incidents. Piracy is merely one symptom of insecurity at sea which is closely linked to other organised criminal activities.

Attacks against local vessels in or near the Niger Delta are also frequent, highlighting the fragile security situation in this part of Nigeria. Such attacks are often linked to other criminal operations, namely to oil-related crimes, or to conflicts between oil companies and local communities.

Crude oil theft and smuggling of illegally refined oil products have long been major concerns for the Nigerian government. Such activities provide organised criminal groups across the Niger Delta with significant revenues. In recent years, profit margins have skyrocketed, leading to a drop in piracy across the Gulf of Guinea as 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.



Clean-up work after the dismantling of an illegal refining site by security forces in the Niger Delta region (Photo: Nigerian Ministry of Defence)

Nigerian security agencies carry out frequent operations to limit crude oil theft. In July, military forces announced the destruction of dozens of illegal refining sites across the Niger Delta. Several vessels and equipment to store and transport stolen crude oil and illegally refined products were also seized. These operations were conducted as part of Operation Delta Sanity which started in January 2024.

Similar activities are very likely to continue in the coming months but sustainable improvements of the situation remain unlikely. While the impact of this situation is almost exclusively domestic, it is noteworthy because these efforts require a lot of resources, leaving limited room for naval and law enforcement activities across the Nigerian EEZ.

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.

Forecast

The threat level in the coming month remains high across the inner Gulf of Guinea, underlined by several incidents in the past 12 months. Pirate attacks are possible at 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)

Across the region, there were no maritime security incidents reported in July. Virtually all cases in recent months which targeted merchant ships at berth or at anchor did not involve violence against seafarers. 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 July 2025, shown on the map below. Further incident details are available on the Risk Intelligence System.



Incidents

There were eight incidents this month related to Houthi operations in the southern Red Sea, including Israeli strikes targets in Yemen. The most significant incidents are listed below. Additional information about the situation in the southern Red Sea and the wider area can be found in Risk Intelligence's *Middle East Weekly Intelligence Report*.

6 and 7 July – Bulk carriers MAGIC SEAS and ETERNITY C. attacked

Insurgency operation, southern Red Sea

6 July – Bulk carriers DSM NORWICH and DSM EVERTON damaged at pier

Military operation, Hudaydah (Yemen)

24 July – Livestock carrier MERINOS LIVESTOCK reports attack

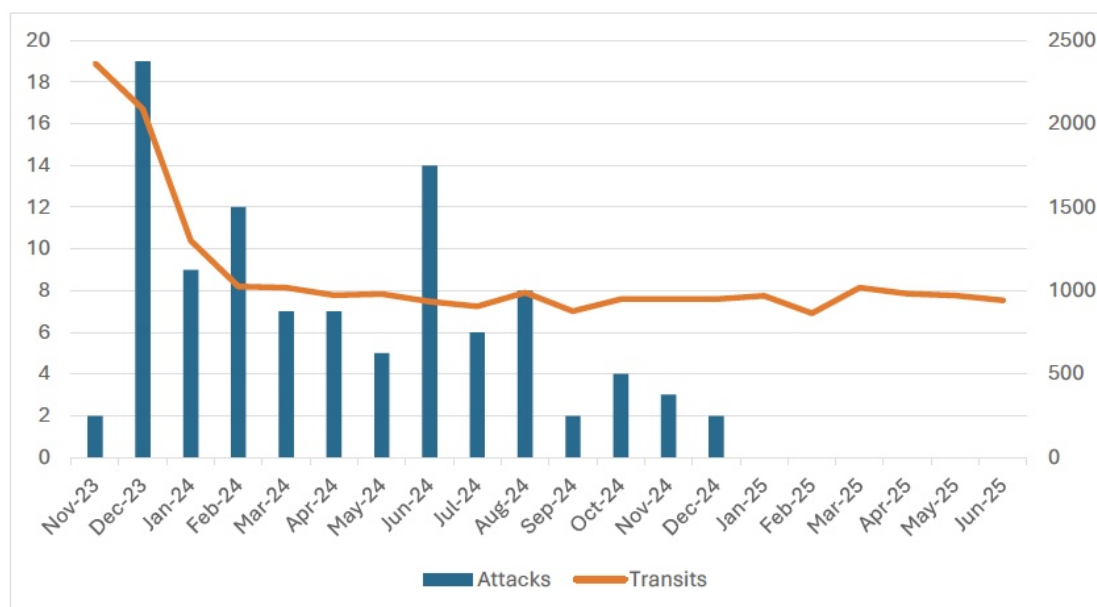
Naval operational, southern Red Sea

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 July included Israeli air strikes on the ports of Saleef and Hudaydah. In the latter location, two bulk carriers at berth suffered collateral damage. Ports are favoured targets for Israeli retaliation for Houthi missile attacks on Israel proper.

The most recent strike during the month was on 21 July. An Israel statement said that the strike, using drones, targeted “engineering equipment working to restore port infrastructure, fuel tanks, and vessels used for military activity”. The Houthis will likely continue to focus on occasional attempts to strike Israeli territory, as demonstrated by continued strikes this month.



*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)*

After no attacks from January to June 2025 (see figures above), the Houthis resumed their attacks on merchant shipping by targeting the bulk carriers MAGIC SEAS and ETERNITY C. on 6 and 7 July respectively. The attacks involved small craft as well as more heavy ordnance. Both vessels were eventually sunk. In the case of the ETERNITY C., crew casualties occurred as well as extensive SAR operations to rescue those remaining. Several crew members were picked up by Houthi forces and are currently being held in Yemen.

In both cases, the owners of the vessels had commercial links with Israel, consistent with previous Houthi statements about vessel targeting. The maritime campaign was suspended on 19 January 2025 but not formally ended. The Houthis also issued a statement on 27 July, threatening to target vessels belonging to companies with commercial links to Israeli ports. This

does not materially change the targeting parameters as it mirrors another statement from May 2024. The announcement served mostly strategic communications purposes.

It is not yet clear, however, as to whether the two attacks were isolated incidents to serve as a reminder to international shipping or the resumption of a more systematic Houthi campaign. Very few “valid” targets as per the Houthis’ targeting parameters are sailing through the Bab el Mandeb and transit numbers have remained virtually unchanged since February 2024. Despite the interception of an arms shipment likely for the Houthis that was intercepted in the Gulf of Aden this month, it is assessed that there has been no significant degradation of Houthi capabilities.

Concerns about interference of navigational systems in the Red Sea have also increased. This has affected civilian maritime traffic, although there were no incidents reported this month. 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.

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.

Forecast

The security situation in the Red Sea is largely contingent on the situation in Gaza and on the broader political situation in the region. The main focus of the conflict has now shifted to limited attacks by the Houthis on Israeli territory with Israeli air strikes in retaliation. Despite the situation between Israel and Iran, the Houthis will make their own calculations as to the costs and benefits of continued vessel attacks.

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 attacks against merchant ships – on a limited or widespread basis – should they determine that there has not been enough progress in the Gaza conflict.

Gulf of Oman – Persian Gulf

There were no incidents in this area during July. The situation has remained broadly stable as the major players consider their next move following Israel’s attack on Iran in June, targeting Iranian nuclear and military facilities as well as key leadership figures. The 12-day campaign also led to Iran responding by firing waves of missiles against Israel.

The maritime environment did not appear to play a major role in this conflict, which was exclusively aerial – although there were potential issues with Iranian port disruptions. Concerns

about strikes against merchant vessels did not materialise, and besides GNSS disruptions, which pose a substantial operational threat, no additional incidents were reported. Maritime traffic through the Strait of Hormuz remained at regular – albeit slightly reduced – levels throughout the Iran-Israel war.

The focus has now shifted back to Israel and Gaza and ongoing developments there. For both Israel and Iran, it was a costly conflict in terms of ordnance expended and there is likely a period required by both sides for rebuilding defensive and offensive capabilities. The issue of Iran's nuclear programme has not been resolved, and the programme has been disrupted rather than destroyed. No US-Iran talks have been officially scheduled.

The Iranian foreign minister has stated that negotiations could restart if Iran received firm assurances that no future military strikes would follow diplomatic engagement. EU countries are reportedly pushing for a start to talks, as there is a deadline for the automatic resumption of UN 'snap back' sanctions.



Iranian patrol craft in the Strait of Hormuz (Source: Iranian media)

Overall, recent months have left the region in a precarious situation politically. Further Iranian retaliation against the US is currently unlikely to involve significant attacks. At the same time, Iran faces difficult choices on how to preserve its national security. If there are further negotiations about the Iranian nuclear programme, or even promises regarding sanctions relief, these developments will play out over the coming months.

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. This situation has not changed substantially following the Israeli/US attacks, although Iran has had its military weaknesses exposed and will be wary of retaliation.

There is still 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. Such operations give Iran the option to retaliate on a case-by-case basis and linked to specific disputes.

Somali Basin and wider Indian Ocean

There were no incidents in this area in July. Despite the proximity between areas of the Indian Ocean and the Gulf of Oman, there are no security implications for the Indian Ocean from the regional tensions focused on the Persian Gulf and surrounding areas.

Recent piracy cases in the Indian Ocean 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.

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.

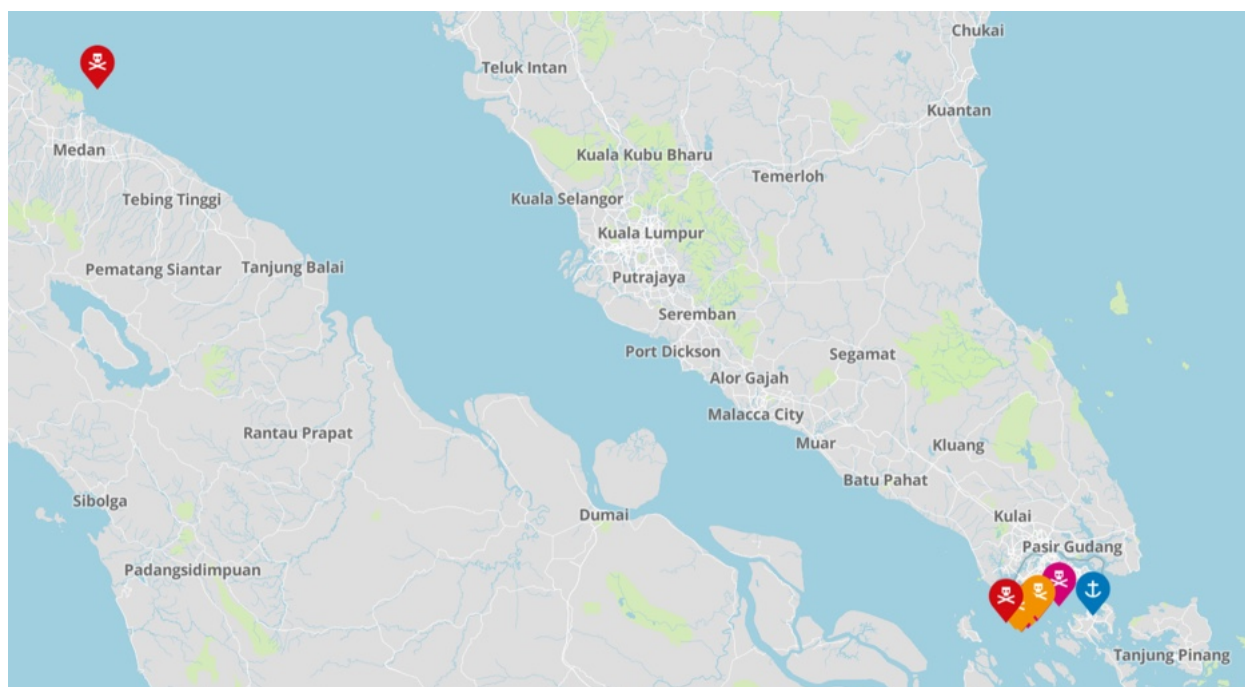
Forecast

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



Incidents

1 July - Bulk carrier JAL KALASH boarded underway

Failed theft, Singapore Strait

1 July - Bulk carrier GALATEIA boarded underway

Armed robbery, Singapore Strait

2 July - Bulk carrier BEAGLE boarded underway

Failed robbery, Singapore Strait

4 July - Bulk carrier MODIGLIANI boarded underway

Failed theft, Singapore Strait

4 July - Container ship NORD SERAPHINA boarded at anchorage

Armed robbery, Port of Belawan, Indonesia

4 July - Bulk carrier MEDI PALMAROLA boarded underway

Theft, Singapore Strait

4 July - Product tanker STELLATA boarded underway

Failed theft, Singapore Strait

6 July - Crude oil tanker AL SALMI reports attempted boarding underway

Failed theft, Singapore Strait

6 July - Container ship KOTA NABIL boarded underway

Failed theft, Singapore Strait

6 July - Bulk carrier AL LULU boarded underway

Armed robbery, Singapore Strait

7 July - Bulk carrier STAR LAURA boarded underway

Failed theft, Singapore Strait

7 July - Container ship CMA CGM FORT JAMES boarded underway

Failed robbery, Singapore Strait

8 July - Asphalt tanker TASCOS SAKORN boarded underway

Theft, Singapore Strait

9 July - Product tanker TORM ELIZABETH boarded underway

Theft, Singapore Strait

9 July - Pirate groups arrested

Anti-piracy operation, Batam, Indonesia

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

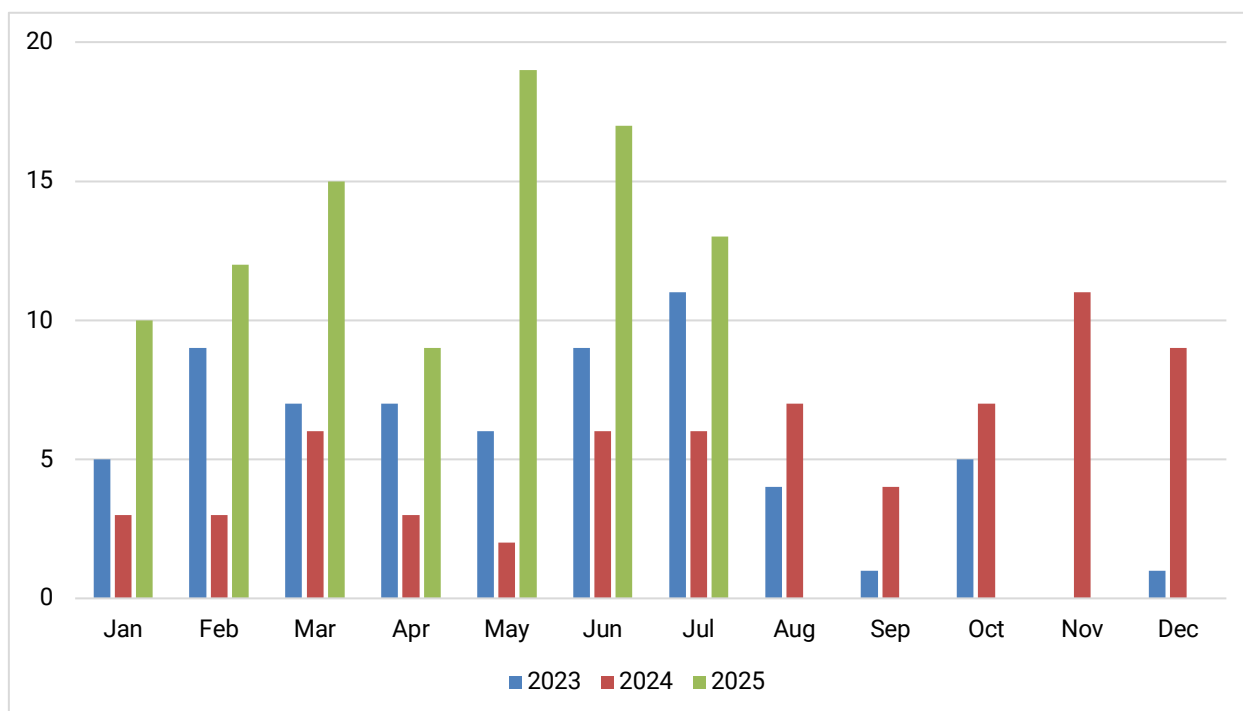
The upward trend of Singapore Strait vessel boardings that began in November 2024 saw a modest decline in July following law enforcement initiatives on Batam Island, Indonesia. Utilising CCTV footage of perpetrators that boarded vessels in the strait that was provided by the vessel operators, combined with related information provided by other entities, the Riau Islands Regional Police's Directorate of Water and Air Police was able to identify and arrest one suspect on Batam Island on 9 July. Information obtained from this suspect led to the arrest of ten other suspects, reportedly members of a gang that preyed on vessels navigating the strait. A second wave of arrests that targeted members of another gang took place on 24 July. Spokespersons for the police stated that members of a third gang known to be active in the strait remain at large.

Evidence seized during these arrests confirmed that perpetrators carry knives and airsoft guns while targeting vessels. It was also revealed that many of the perpetrators use crystal meth before boarding vessels, which explains their sometimes-violent behaviour. One home-made pistol capable of firing live ammunition was also found during the arrests, illustrating the potential threat to seafarers serving on vessels transiting the strait.



Suspected armed robbers in the custody of Indonesia's Riau Islands Regional Police's Directorate of Water and Air Police (Photo: Posmetro)

The first round of arrests on Batam Island on 9 July followed the month's last reported incident earlier that day, during which the TORM ELIZABETH experienced a theft of engine spares. With no further reported incidents, the total of 13 Singapore Strait incidents reflected a slight decline as compared with 17 in June and 19 in May.



Number of maritime security incidents in the Singapore Strait per month in 2023, 2024 and 2025 to date (Source: Risk Intelligence System)

Except for the armed robbery on board the container ship NORD SERAPHINA at Belawan, all reported incidents in July took place within the limits of the Singapore Strait. All vessels were boarded underway in the eastbound lane of the Singapore Strait Traffic Separation Scheme. Bulk carriers remained the most targeted ship type with 7 boardings, followed by tankers (4 boardings) and container ships (2 boardings). There were no barge boardings reported during July.

Turning to the previous 12 months, 83% of the 160 incidents reported in Southeast Asia have taken place in the Singapore Strait. Of the 133 incidents in the strait, 77 involved bulk carriers, 31 involved tankers, 11 involved barges and other craft in tow and 10 involved container ships. The outliers involved 3 general cargo vessels and 1 OSV. No incidents involving passenger vessels have occurred in the Singapore Strait. All but one Singapore Strait incident during this period targeted ships underway, with 86% taking place in the western zone between Karimun and Batam

Armed robbers and thieves typically board vessels at night seeking engine spares, supplies and equipment while avoiding crew. Areas with the highest frequency of criminal activity during the past twelve months beyond the Singapore Strait include 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 Singapore Strait, there have been incidents involving vessels underway in the Java Sea, the South China Sea and the Malacca Strait.

Hijackings

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 have effectively suppressed such crimes, despite occasional incidents involving small tankers and barges, which are locally owned, managed and trading.

As fuel subsidies continue to be phased out across Southeast Asia, rising prices may drive increased fuel smuggling and illicit sales in the South China Sea, Sulu/Celebes Seas, and the Straits of Malacca and Singapore. This economic pressure heightens the risk of opportunistic hijackings targeting smaller tankers, particularly those carrying refined fuel cargoes. While full-scale hijackings remain rare, smaller regionally trading tankers and tankers on domestic routes remain vulnerable, underscoring the need for continued vigilance

Offshore

Reports of boardings targeting oil rigs are infrequent. However, there is credible evidence of underreporting for such 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. Otherwise, boardings of OSVs while at port anchorages are occasionally recorded.

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.

In July, China reduced its military activity near Taiwan but nonetheless deployed aircraft, many of which crossed the Taiwan Strait's median line. Throughout July, the PLA Navy also consistently deployed vessels and China Coast Guard units around Taiwan's offshore islets, especially near Kinmen and the Pratas, to apply pressure during Taiwan's Han Kuang 41 military exercise.



Taiwanese troops during Han Kuang 41 on the island of Dongyin near Matsu (Photo: Dongyin Area Command)

Taiwan conducted its annual military exercise, Han Kuang 41, in July. The 10-day drills involved 22,000 reservists and simulated a broad range of threats, including amphibious landings, missile attacks, cyber warfare, and disinformation campaigns. President Lai described the evolving situation as a “war without gun smoke,” underscoring China’s use of grey-zone tactics alongside traditional threats. The exercise reflected Taiwan’s shift toward a whole-of-society defence approach that blends military capability with civilian resilience.

Following North Korea’s launch of its first 5,000-ton guided-missile warships in April and June, it was reported that construction of a third destroyer began in mid-July, signalling an acceleration in their naval modernisation plans. North Korea’s state media also confirmed that their warships had successfully launched anti-aircraft, cruise and supersonic missiles during sea trials.

On 16 July, a confrontation occurred near Scarborough Shoal between the Philippine Coast Guard vessel BRP Teresa Magbanua and two Chinese Coast Guard ships. The Chinese vessels reportedly executed close-range manoeuvres, prompting Manila to accuse Beijing of harassment and unlawful obstruction within its EEZ. China’s state media countered by accusing the Philippines of “deliberate provocation.” The incident drew renewed attention to the 2016 arbitral ruling, which both sides referenced in their respective statements.

During a bilateral meeting in Washington on 21 July, US officials reaffirmed their defence commitments to the Philippines, citing the Mutual Defense Treaty and pledging increased deterrence capabilities in the South China Sea. President Ferdinand Marcos Jr. welcomed the support, noting the strategic importance of joint exercises and expanded interoperability. The visit coincided with growing concerns over daily sightings of Chinese maritime militia vessels near Philippine-occupied features.

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.

July saw some progress achieved with the long-awaited Code of Conduct in the South China Sea (COC). In mid-July, ASEAN and China finalised the 'Single Draft COC' negotiating text, marking a milestone after two decades of diplomacy. The agreement sets the stage for more substantive talks on maritime self-restraint and dispute management.

While the draft is not legally binding, ASEAN foreign ministers emphasised the urgency of concluding negotiations by 2026, with Malaysia, this year's ASEAN Chair, expected to play a pivotal role in shaping enforcement mechanisms.

On 22 July, Chinese and Indonesian officials marked the 75th anniversary of diplomatic relations with a gala event in Jakarta, where Chinese Defense Attaché Xu Sheng praised the two countries' growing military cooperation as a model for ASEAN. The event followed the inaugural China-Indonesia 2+2 Ministerial Dialogue, held earlier in the month, which brought together foreign and defence ministers from both sides to discuss regional security, joint training, and counterterrorism coordination.

The dialogue signaled a strategic deepening of ties, with both nations agreeing to expand cooperation across five pillars: political, economic, maritime, people-to-people, and security. Notably, last year's joint military exercise 'Heping Garuda' was highlighted as a milestone in operational collaboration.

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, Vung Tau and the Tarahan anchorage. 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 vulnerable 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 commercial traffic in the region is 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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