RiskIntelligence

Middle East Weekly Intelligence Report

27 August 2025

Risk Intelligence A/S
Strandvejen 100
2900 Hellerup
Denmark

Tel: +45 7026 6230
info@riskintelligence.eu
www.riskintelligence.eu

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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.

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: 27 August 2025, 08:00 UTC.

Current situation

The lull of the past few weeks has continued with no major maritime incidents taking place across the Middle East. The situation in the Red Sea and in the Persian Gulf remains relatively stable, with no actor appearing to want to escalate for the time being. The exchange of ordnance is expected to continue.

Six Syrian government soldiers were reportedly killed by Israeli strikes on July 26. This follows a slight increase in tensions between both countries, in a context of repeated Israeli operations within Syrian territory and efforts to annex Syrian territory under various pretences.

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 Some attacks during the early stages of the campaign apparently relied on outdated information about individual ships.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, however, Houthi attacks against merchant ships have not been 'indiscriminate' despite widespread claims by the US and other Western governments.

Merchant ship transits through the Red Sea have not significantly increased or decreased since February 2024, despite peaks and troughs in the number of attacks carried out by Houthi forces. Very few "valid" targets as per the Houthis' parameters are transiting the Bab el Mandeb. The threat issued by the Houthis on 27 July against vessels with commercial links to Israel regardless of their flag or nation has not signalled any change in the Red Sea situation. The announcement served mostly as strategic communication.

Syrian – Israeli relations

Six Syrian government soldiers were reportedly killed by an Israeli drone strike in southern Damascus' countryside. Recently the Syrian government had accused Israel of deploying 60 men within its territory – which Israel did not deny, beyond correcting the locality of the patrol, claiming "security concerns". The incidents are taking place while both states are engaged in talks, mediated by the US, meant to decrease tensions. This is highly unlikely to be Israel's or the US's desired outcome, as Israel is believed to seek to annex Syrian territory, profiting from the favourable military and political climate.

Militarily, Syria is in no position to counteract Israel's territorial seizures. The new government, which is still contested within Syria, is focused on securing international recognition and has adopted a policy of placating its neighbours, making significant concessions and reassuring as to its lack of offensive designs. Furthermore, the necessities of post-war reconstruction, coupled with current US politics, mean that Syria cannot defend itself against Israeli attempts without risking renewed US sanctions. These would suffocate the barely nascent foreign investments needed to rebuild the country.

It is unlikely that Syria expect any positive outcome from US mediation in its talks with Israel, or its regular denouncing of Israeli operations within its territory. However, the government is likely compelled to do so to save face domestically and at least record its claims to control of the coveted territory.

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 the Houthis' ability to maintain pressure on the shipping industry.

Overall, US and Western European vessels are exposed to a 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 two attacks in July support the assessed threat levels as described below, indicating that vessels calling Israeli ports 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	**Severe**
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	**Elevated**
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	**Elevated**
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')	**Moderate**

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.

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' capabilities 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.

It is vital to consider that the situation requires close monitoring. Updates regarding incidents as well as constantly updated threat assessments are available on 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).

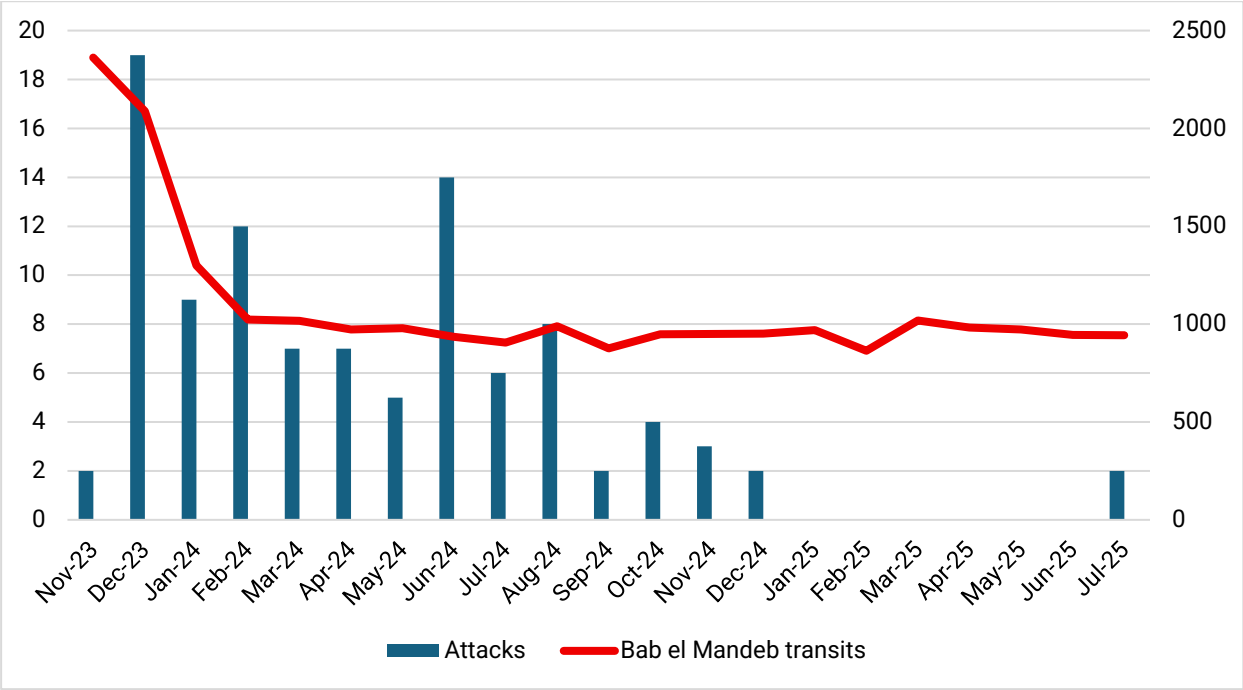

Figure 1: Attacks against merchant ships per month (blue columns) and number of monthly Bab el Mandeb transits by merchant ships >10,000 dwt (red line) (Source: Risk Intelligence System / Lloyd's List Intelligence/Seasearcher)

Detailed statistics about Houthi attacks against commercial ships in the Red Sea and the Gulf of Aden since November 2023 are 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 in the broader region than to maritime activity in the Red Sea and the Gulf of Aden specifically.

The decision of ship operators 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.

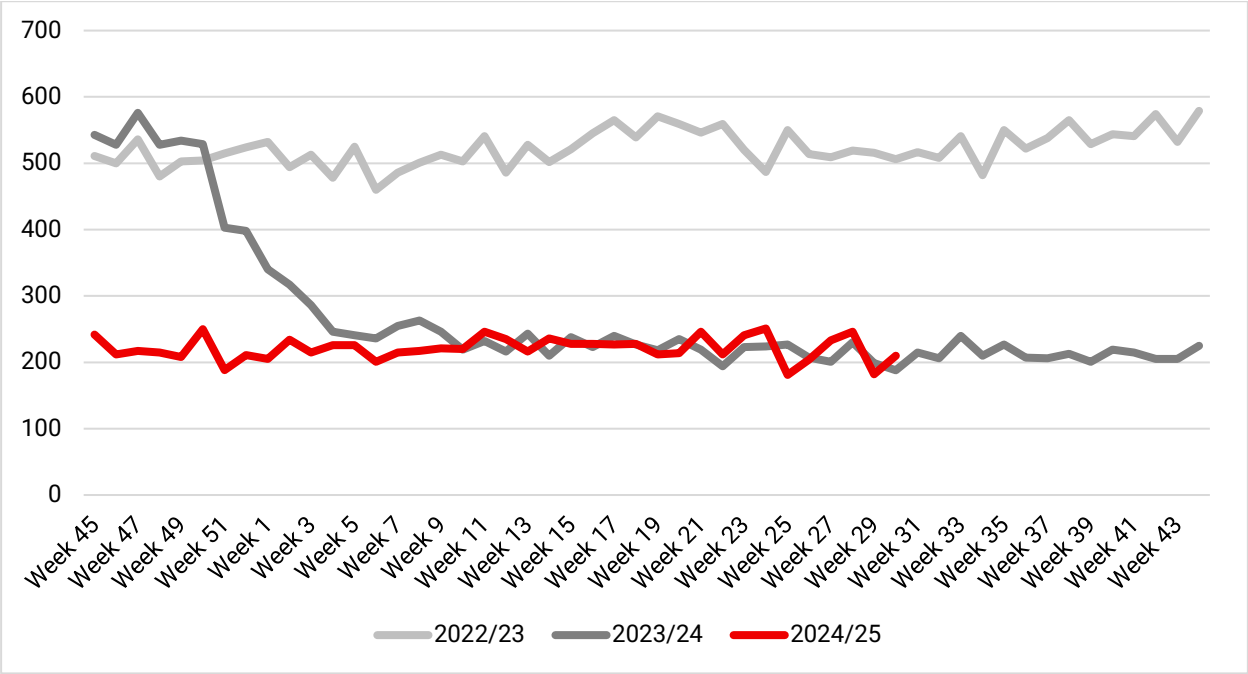

Figure 2: Year-on-year comparison of Bab el Mandeb transits by merchant ships >10,000 dwt, indicating a sustained decrease to the "new normal". (Source: Lloyd's List Intelligence/Seasearcher)

Ongoing military operations have not lowered the threat level for commercial shipping substantially, underlined by the two attacks in July. 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 verifiable figures and should not be considered a mitigation measure to lower the risk level of an attack against the respective ship.

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 Houthi 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, with updated security and mitigation measures applicable to Red Sea transits.

All documents are available via 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
Phone: +44 2393 222060
Website: www.ukmto.org

Contact details MSCIO

Email: postmaster@mscio.eu
Phone: +33 298 220 220 or +33 298 220 170
Website: 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

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 aerial and naval drones or missiles. These strikes have been concentrated in the southern Red Sea and the western Gulf of Aden. Certain ships, such as those linked to Israel by Houthi determination, are highly likely to be targeted if present in that area. The Houthis' maritime campaign was started in November 2023 in reaction to Israel's military operations in Gaza.

In the first incidents 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. Both vessel owners had called Israeli ports with other ships in their respective fleet. It is not clear as to whether these were isolated incidents or the resumption of a more systematic Houthi campaign.

The maritime campaign had previously been suspended on 19 January 2025, but not formally ended. The US had resumed a campaign of aerial bombing for a few months after Donald Trump's return to power, though this was suspended by a ceasefire in May 2025. It is unclear to which group of vessels the US-Houthi ceasefire deal applied, though it does not appear to have extended beyond US vessels.

Israeli attacks on Iran in 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 in violation of the ceasefire deal.

Israel and the Houthis are still engaged in a cycle of retaliatory strikes which maintains a high threat level in the southern Red Sea. Houthi attempts at missile and drone strikes against Israel are expected to continue in the medium term.

Overall, there is still some way to go before a return to the pre-campaign normal. Notably, political considerations in Yemen must favour a cessation of Houthi strikes at sea. The shipping industry must also be convinced that any lull in attacks is not just temporary. Any progress may easily be inverted, highlighted by the two attacks in July and the political pressure in Israel to continue 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.

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. Unprecented 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 Middle East politics.

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 law enforcement, or to ‘warn away’ merchant vessels from their activities.

Threat levels

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Terrorism	Moderate
Piracy	Low
Insurgency and Military Operations	Elevated
Cargo Theft	Low
Smuggling	Moderate
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, although another expansion of the Houthi campaign is possible, based on Houthi perceptions of Israeli actions or in response to US military action against Iran. For now, the threat level remains unchanged despite the 6 and 7 July attacks on two bulk carriers, the MAGIC SEAS and the ETERNITY C., in the southern Red Sea. These were the first Houthi-linked incidents in 2025. 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 in 2024 and 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.

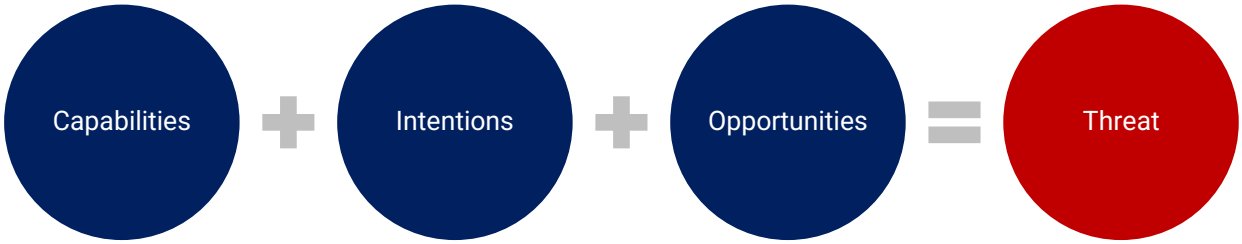
Threat levels

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	Elevated
Insurgency and Military Operations	Moderate
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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Risk Intelligence A/S
Strandvejen 100
2900 Hellerup
Denmark

+45 7026 6230
riskintelligence.eu