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Monthly Intelligence Report

Risk Intelligence System
Advisory Services
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Monthly Intelligence Report

This report includes an overview of attacks against merchant vessels over the past month in three regions (West Africa, the western Indian Ocean and South East Asia) as well as assessments of different types of threats in these area. In addition, the report includes a monthly focus article and provides a brief update on the maritime implications of the war in Ukraine.

Monthly focus: UN Security Council debates maritime security at a time of historic weakness

Introduction

In August, Panama, holding the UN Security Council (UNSC) presidency, convened an open debate titled “Maritime Security: Prevention, Innovation, and International Cooperation to Address Emerging Challenges”. No formal outcome or resolution was expected, with the meeting building on concerns by many members over maritime security.

The debate followed discussions in 2021, during India’s presidency, when the Council adopted a presidential statement which identified a range of maritime threats. The statement also 'recognised the importance of international and regional cooperation and emphasised the need to enhance information-sharing and strengthen national capacities to promote maritime safety and security.'

Whether there is value in the UNSC leading the way on cooperation, information sharing and strengthening capacities is one question. Another is whether the UNSC is able to take the lead at all.

In its own reporting, the Council noted that Russia argued that the issues in the debate – such as transnational organised crime, illicit arms trade, drug trafficking, trafficking in persons and the illegal exploitation of marine resources – are 'not part of the Security Council’s remit'.

China also argued that the Council is not the appropriate venue for addressing specific maritime disputes, such as those in the South China Sea. Moreover, Russia denounced UK and EU sanctions against its so-called 'shadow fleet’ of vessels.

The weakening of the UN Security Council and the decline of international law

Under the UN Charter, the UNSC has 'primary responsibility for the maintenance of international peace and security' and can make binding decisions in response to acts of aggression and other threats. The limits of the UNSC are the veto power given to the five permanent members: the US, the UK, France, Russia, and China. During the Cold War, the UNSC was paralysed by rivalries, limiting collective action.

In the early 1990s, following the Cold War, the UNSC demonstrated unusual unity in confronting major crises. It authorised a broad coalition to reverse Iraq's invasion of Kuwait in 1990–1991, and it supported peacekeeping and intervention efforts in the Balkans and in East Timor. While political considerations were still acute, these actions illustrated the Council's potential to act as a credible enforcer of international norms.

Recent conflicts have seen a return to paralysis. Russia's 2022 invasion of Ukraine showcased this as Moscow used its veto to block resolutions condemning its own aggression. Likewise, repeated US vetoes of resolutions calling for ceasefires in Gaza undermined the Council's supposed role as a neutral arbiter. Even in addressing global challenges like climate change and pandemics, the Council has been sidelined, unable to overcome P5 disagreements. States and regional blocs therefore increasingly bypass the UN framework, pursuing unilateral or ad hoc coalitions instead.

The paralysis can diminish faith in international law, creating a vacuum of authority that non-state actors and rival powers can exploit. International institutions can also be weakened. The International Court of Justice (ICJ), for example, handles disputes between states, but its enforcement mechanism depends on the Council.

For the International Criminal Court (ICC), which can prosecute individuals for crimes against international law, powerful states can shield themselves and their allies from accountability. In August, for example, the US State Department introduced restrictions against individual ICC judges it said had been instrumental in a past decision to investigate US officials and in efforts to prosecute Israeli leaders.

Maritime security threats are becoming more complex

An increasingly complex geopolitical situation has also led to an expansion of security threats affecting commercial shipping operations. Many traditional threats stem from organised criminal groups and their activities. Global hot spots for these activities have largely stayed the same, even as threat levels have changed over time. Examples:

- 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.

- Piracy incidents off West Africa have to a degree flatlined, although many underlying factors remain. 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.

- For Somali piracy, the threat remains elevated despite no recent incidents involving merchant ships. Current pirate activities are directed mainly at fishing and locally trading vessels close to the coast. However, underlying factors supporting piracy remain.

- There have been more incidents of piracy in the Singapore Strait in 2025 compared to previous years. The modus operandi has changed little, but these incidents are still significant. The upward trend that began in November 2024 saw a modest decline in July following law enforcement initiatives in Indonesia.

The challenges ahead for maritime security also include geopolitical and strategic conflicts that are now becoming more acute for commercial shipping operations. Russia's invasion of Ukraine has disrupted Black Sea commerce and direct trade between Ukraine and the rest of the world. Sanctions on Russia mean that vessels are now being subject to direct restrictions as part of the pressure campaign on Russia.

In the Red Sea, maritime traffic has been effectively halved by the Houthi campaign against Israel. After no attacks on vessels in the first half of 2025, there were two attacks in July that resulted in both vessels being sunk and crew casualties. Houthi threats have led to the re-routing of ships away from the Red Sea. International naval action and direct attacks on the Houthis in Yemen have not been successful in reducing Houthi capabilities significantly or even affecting their intentions.

More security challenges ahead

In June, unilateral action by Israel and the US against Iran failed to destroy Iran's nuclear programme. This has left Iran's potential nuclear status as an unresolved issue in the security architecture of the Middle East and a potential flashpoint in the future. During the conflict, Iran's closing of the Strait of Hormuz was discussed as a possible scenario – even if it was unlikely. Such a scenario remains at least plausible.

This unresolved issue, not to mention the conflicts in Gaza and in Ukraine, is symptomatic of the current situation affecting commercial shipping. Geopolitical and strategic conflicts are becoming more politicised and entrenched, and more difficult to resolve. The UNSC has been sidelined. Narrow power interests now determine the direction of international relations. There are other potential flashpoints, e.g. India and Pakistan, the Taiwan Strait or the Baltic Sea, where power politics may disrupt or even directly threaten shipping and offshore installations.

In its August report, the UNSC noted that threats to maritime security are becoming 'increasingly complex and interconnected'. In particular, the Council was concerned about disruptions to freedom of navigation which 'pose a serious threat to international trade and global economic stability, with cascading impacts on food and energy security.'

With the UNSC itself unable to take action, maritime operators will be best served by remaining flexible and agile in their planning to be able to respond to delays and disruptions and even direct threats to their operations.

Those undertaking forward-looking assessments will be able to at least mitigate some of the risks, even if recent security developments have shown – in the words of the UNSC – the 'fragility of global maritime trade routes.'

Additional Services

The Risk Intelligence System provides clients with real-time intelligence and situational awareness to assist in threat avoidance for global maritime and land-based operations. Additionally, Risk Intelligence offers ship operators the option to purchase security intelligence reports for individual ports and terminals.

For more tailored support, bespoke services such as threat assessments or voyage-specific risk assessments help identify and mitigate both persistent and emerging security threats.

Risk Intelligence also hosts frequent webinars, offering in-depth updates, mini masterclasses on situational awareness methodologies, and expert analysis of current events. Schedules and registration details are available on the company's website.

Update: Maritime dimensions of the war in Ukraine

Situation on land

War-related developments in August have not changed the threat picture for the Black Sea region, with the north-western area of the Black Sea still an active war zone. There was a renewed focus in political and diplomatic activity with two notable meetings held in the US in August.

The first was the summit in Alaska between US president Trump and Russian president Putin on 15 August. A subsequent meeting was held in Washington with the participation of Ukrainian president Zelenskyy and a number of European leaders on 18 August. Both meetings were held under the guise of establishing a way to secure a peaceful solution to the war in Ukraine.

However, even though these meetings were noteworthy – with Putin making his first visit to the US since 2015 – the meetings have not produced any real change to the current situation. On 28 August, Russia reportedly conducted the second-largest attack on Kyiv during the entire war.

Following the meeting in Washington, there were mentions of various forms of security guarantees for Ukraine – including some to be established after the war has ended. However, there are no details about what security guarantees would look like or how they would be actioned if agreed to.

Additionally, there have been mentions of a bilateral meeting between presidents Putin and Zelensky, which would be followed by a triparty meeting with the proposed participation of US president Trump. The Ukrainian side has expressed a willingness to participate in such meetings. Russia has not completely dismissed it, but government officials have stated that there are several points which would need to be addressed before it could take place.

Given previous statements by various Russian officials, including that Russia does not view president Zelensky as a legitimate leader, any such meeting seems unlikely to occur. Furthermore, as long as the Russian leadership believe they can continue the current military operations, they are likely to continue to convince Trump that they are actively working

towards peace in good faith, to avoid triggering US sanctions or renewed military support for Ukraine.

US and European leaders meeting in Washington on 18 August 2025. (Photo: Ukraine Presidential Office)

At the same time, there seems to be a shift in the US administration's approach away from seeking an immediate ceasefire and instead focusing on establishing a lasting peace. However, it is currently unclear whether this apparent change of desired outcome also reflects a change in policy and whether or not this also means no desire for a maritime ceasefire in the Black Sea – which had been previously discussed as part of various options.

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 both naval and aerial drones which are used for military operations in the eastern Black Sea. Naval drones include both surface and underwater drones.

While such operations do not increase the threat for merchant ships, the widespread use of drones underlines the ongoing general threat to maritime operations in the Black Sea, including possible collateral damage. Military operations targeting Russian and Ukrainian coastal military infrastructure or related equipment have included attacks against Russian and Ukrainian port infrastructure and port cities.

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 have been reported on several occasions since early 2024, underlining that Russia is prepared to deliberately target commercial ships en route to or from Ukraine in specific cases. Russia has previously announced that 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.

There have been various incidents of vessels experiencing what has been reported as 'limpet mine' explosions, causing more or less significant damages. Although there are some similarities between the various incidents such as vessel types or ports visited, there are also differences and individual causes of the different incidents remain unclear. It is possible that Ukrainian forces are trying to disrupt vessels trading with Russia. However, it is also possible that groups or individuals are operating on their own or other initiative, either in support of Ukraine or to further their cause.

Incidents have also been reported at Ukrainian Danube ports. Future incidents cannot be ruled out, but these are less likely than in Ukraine's larger ports. Direct targeting of merchant ships is unlikely. 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 maritime traffic and the reported number of mine-related incidents, the threat level in relation to mines is moderate.

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 Sea. 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

The US administration has currently moved focus to Gaza and Israel but may return focus to Ukraine in a couple of weeks, when it has been alleged a meeting between Zelenskyy and Putin could take place – although this seems highly unlikely. It is possible that the intensity of US diplomatic efforts may only last until 10 October, when the winner of the Nobel Peace Prize is set to be announced.

As Donald Trump has been outwardly obsessed with this prize, the timing of the intense August effort to end the war suggests a connection. If this is a main driver behind the effort, and because of the erratic and unpredictable US Presidency, it is possible that US diplomatic efforts may subside after the announcement of winners - especially if Trump fails to win. In such a case, Trump may abandon the negotiations entirely out of anger with the parties, or even impose penalties on those viewed as having slowed the process.

The main goal of both the Ukrainian and Russian leadership is to convince Trump that they are actively working towards peace in good faith, as to not trigger any US sanctions against Russian and to secure further military support for Ukraine. However, as long as the Russian leadership sees progress along the front, earnest negotiations are unlikely.

The Russian maximalist war goals – notably demilitarization of Ukraine and control over the annexed territories – will continue to derail any real progress. Proposed security guarantees for Ukraine, including proposals of Western/NATO troops in Ukraine, may also be used by Russia as an excuse to say that Ukrainian demands are non-starters, and that negotiations will not happen. Furthermore, vague demands or requirements for the protection of “Russians” or Russian-speaking

people in Ukraine, without any tangible or realistic demands, may also be used as an argument.

Although the US administration appears to have moved away from focusing on reaching an initial ceasefire, it is possible that Ukraine will be willing to accept a ceasefire, considering the extreme pressure of indiscriminate Russian attacks on large cities over the summer. However, a ceasefire will also limit Ukraine's own successful attacks against the Russian rear and Russian energy infrastructure.

Both parties will continue to be aware of how their actions are perceived by the US – where Trump is under pressure to show some progress on the conflict – and this is also likely to influence the Ukrainian response. In the event of a ceasefire, the monitoring and implementation remain uncertain. Large and high-intensity strikes may occur before the ceasefire takes effect, including against ports.

Regardless of the political and diplomatic efforts of the past few weeks, the threat picture has therefore not changed. This will remain the case until a tangible breakthrough occurs, which is unlikely for as long as Russia sees it can both continue its war and achieve some degree of its objectives, while Ukraine can continue to defend itself sufficiently against Russia.

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.

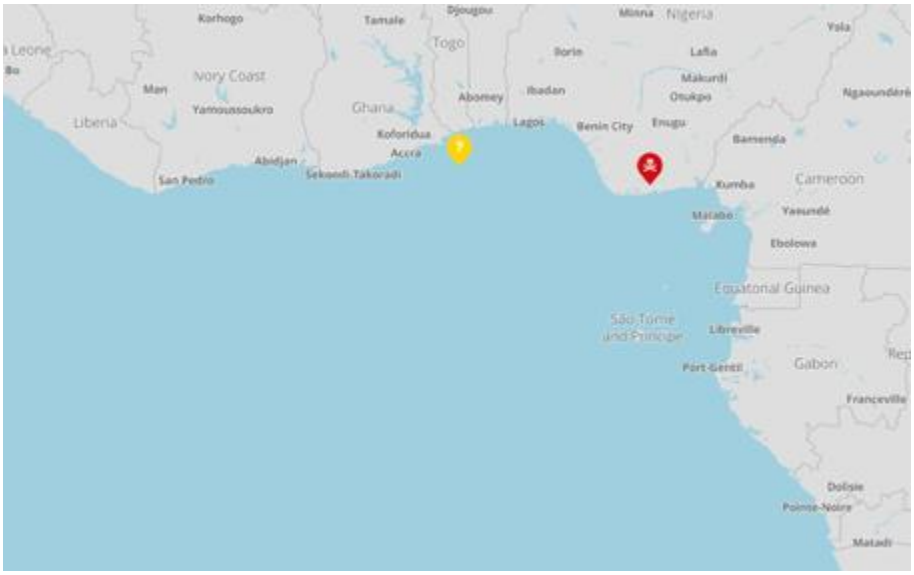
In addition, the report provides an up-to-date overview of the current situation in Ukraine and the northern Black Sea, including concise information regarding the status of exports of grain and other types of cargoes from Ukrainian ports.

West Africa

Summary

- There were no significant changes to the maritime security situation across the region in August.
- One suspicious approach involving a chemical tanker was reported in late August, described in more detail under 'Assessment: Inner Gulf of Guinea'.
- The approaching dry season, beginning toward the end of September, is very likely to lead to improving weather conditions at sea, allowing for small boat operations deep offshore, analysed in more detail under 'Assessment: Inner Gulf of Guinea / Forecast'.

Events included in this report occurred between 1 and 31 August 2025, shown on the map below. Further incident details are available on the Risk Intelligence System.



Source: Risk Intelligence System

Incidents

12 August – Local passenger boat attacked
Armed robbery, Port Harcourt area (Nigeria)

28 August – Chemical tanker ENDO PONENTE reports suspicious approach
Suspicious activity, 60 nm south of Lome (Togo)

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 has been underlined by several incidents in 2025 to date.

In late August, there was also a report about a potential attack which involved a chemical tanker south of Lome (Togo). The vessel had departed from the anchorage and was approached by at least one craft during the evening. The crew then assembled in the citadel. The Togolese navy later provided assistance and escorted the ship back to Lome but it is currently still unclear whether this incident really was an attempted kidnap-for-ransom or hijacking attack.

Togolese patrol boats in the port of Lome (Photo: Risk Intelligence)

Overall, various incidents over the past 12 months have been widely reported as piracy. However, most of the involved vessels had shown suspicious operating patterns prior to the respective incidents. It is therefore very likely that many cases were closely connected to other types of illicit operations at sea. Reporting these merely as piracy cases shows a limited understanding of interconnected maritime security issues in the region. Instead, it is vital to carefully analyse all security-related incidents.

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.

Nigerian security agencies carry out frequent operations to limit crude oil theft. In August, military forces once again announced the destruction of dozens of illegal refining sites across the Niger Delta. Vessels and equipment to transport and store stolen crude oil and illegally refined products were also seized. These operations were part of Operation Delta Sanity which was launched 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 enable operations deep offshore with small boats. Attacks may therefore take place at significant distances from the coastline.

For merchant ships, crew vigilance and measures recommended in BMP Maritime Security remain important to mitigate risks. Security escort vessels for operations off Nigeria are 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 in the Nigerian maritime domain (territorial waters and EEZ). MoU signatories can provide escort vessels partly manned by naval personnel which can only operate in 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.

Assessment: Outer Gulf of Guinea (Côte d'Ivoire to Gabon)

Across the region, there were no maritime security incidents reported in August. 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 upon discovery by the crew.

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

Summary

- There were no significant maritime incidents in this region during August and no incidents affecting regular shipping operations.
- Israel launched attacks against Houthi targets in Sanaa (Yemen). Houthi missile attacks and retaliation by Israel are likely to continue, which could involve port targets in Yemen so long as the conflict in Gaza continues.
- Tensions between Iran and the international community increased in August with the reimposition of sanctions by the UK and EU, analysed under 'Assessment: Gulf of Oman – Persian Gulf'.
- The threat of Somali piracy remains elevated, although trending downward, analysed under 'Assessment: Somali Basin and wider Indian Ocean'.

Events included in this report occurred between 1 and 31 August 2025 are shown on the map below. Further incident details are available on the Risk Intelligence System.

Source: Risk Intelligence System

Incidents

There were two incidents reported during August. 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.

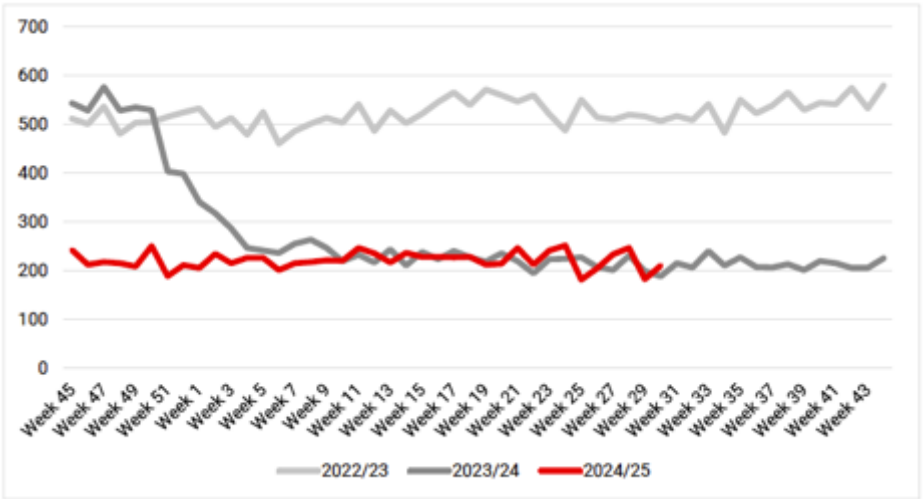
11 August – Iran claims tanker PHOENIX detained for fuel smuggling
Naval operation, Persian Gulf

17 August – Israel attacks Houthi targets near Sanaa
Military operation, Yemen

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. Israel attacked targets near Sanaa on 17 August, retaliating against Houthi targets for missiles launched towards Israel. These strikes were a continuation of the tit-for-tat attacks that have been ongoing at a low level for the duration of 2025. Israel was apparently targeting the local power supply, a shift away from previous attacks that included port infrastructure in Hudaydah.

There were no Houthi attacks against ships in the southern Red Sea during August. This is likely due to the absence of vessels that meet Houthi targeting criteria rather than a shift in the Houthi campaign. There is still a severe threat to vessels linked to Israel through ownership, other commercial relations, and recent port calls. The threat levels for other vessels are depending on their affiliations.



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

The chart above shows the "new normal" for southern Red Sea transits There are very few "valid" targets as per the Houthis' targeting parameters sailing through the Bab el Mandeb. Transit numbers have remained virtually unchanged since February 2024. There has been no meaningful degradation of Houthi capabilities and their intentions to restrict traffic through the region remain unchanged, tied to the ongoing campaign by the Houthis over the war in Gaza.

Concerns about interference of navigational systems in the Red Sea have continued, although with no specific 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 shifted to limited attacks by the Houthis on Israeli territory with Israeli air strikes in retaliation. The Houthis will make their own calculations as to the costs and benefits of continued vessel attacks related to their ongoing campaign, but their goal of reducing traffic has been achieved.

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. Any change to the current situation will be contingent on a resolution to the Gaza conflict.

Assessment: Gulf of Oman – Persian Gulf

There was one incident in this area during August. On 11 August, Iran claimed that it had detained the Cook Islands-flagged product tanker PHOENIX on suspicion of fuel smuggling – although the timing and the details of the claim could not be verified. Iran has an ongoing campaign of interdicting vessels it believes are involved in fuel smuggling, which takes place in the region due to price differentials in refined fuels. Locally-trading tankers are often targeted on the basis of AIS anomalies.

The maritime security 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 maritime environment did not 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.

At the end of August, the UK and EU announced the imposition of the so-called ‘snap back’ sanctions under the Joint Comprehensive Plan of Action (JCPOA), which will include additional arms embargoes, asset freezes, travel bans, and trade restrictions. The main concern by the UK and EU is the absence of Iranian cooperation with the International Atomic Energy Agency to monitor its nuclear programme.

Claimed picture of the tanker PHOENIX in Iranian custody for smuggling (Source: Iranian media)

The government in Iran condemned the move by the UK and EU, arguing that negotiations over the impasse were still ongoing. It is not expected that Iran’s condemnation will lead to specific retaliation and the dispute is unlikely to directly affect maritime security. Nonetheless, it is symptomatic of how Iran’s nuclear programme is a primary driver for overall political and strategic relations in the region.

The Iranian political establishment is likely considering whether to increase engagement with the international community – such as a return to IAEA monitoring, or to go it alone with whatever nuclear developments it chooses. The latter alternative could invite another round of Israeli and US military strikes in the future.

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 apply pressure, including in the maritime environment. Iran will, however, be cautious to avoid wider implications to its own security. This situation has not changed substantially following the Israeli/US attacks, although Iran 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.

Assessment: Somali Basin and wider Indian Ocean

There were no incidents in this area in August. Despite the proximity between areas of the Indian Ocean and the Gulf of Oman, there are no security implications for the Indian Ocean from 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. Moreover, June to September is the monsoon period in the region, and conditions in August have been particularly unfavourable to small boat operations – especially in the northern Somali Basin and Arabian Sea area.

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 – are likely to 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 group launched a major offensive in July and into August, aimed at territorial control of strategic areas in southern and central Somalia. The offensive shows the ongoing potency of the group’s campaign against the Somali government. There is only a limited maritime dimension to the conflict, this is unlikely to change significantly in at least the short term.

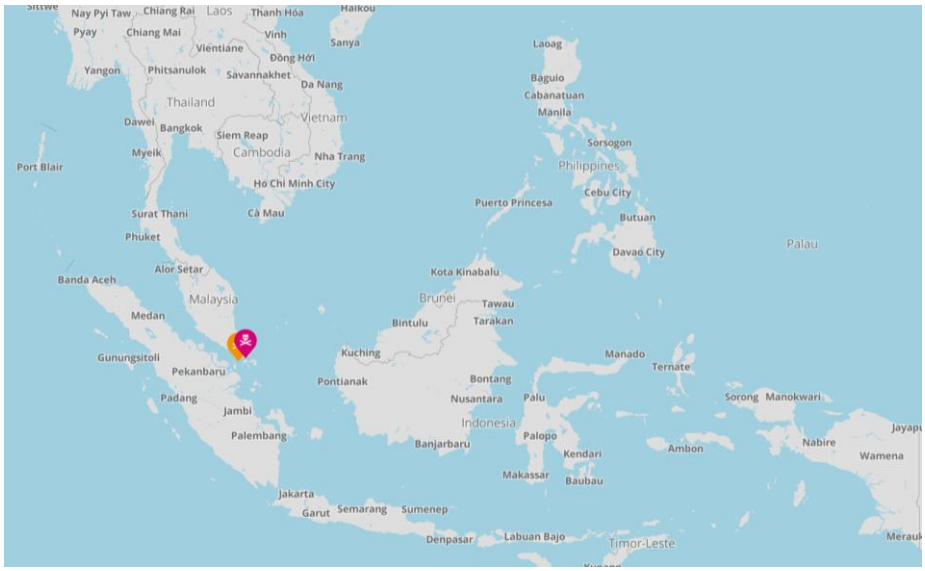
Forecast	Opportunistic boardings remain possible in this area, even beyond 500 nautical miles from the coast, but levels of activity are expected to vary based on local conditions and naval activity – and weather conditions. The threat level is assessed to be elevated but trending downward. Hijacking 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

Summary

- Indonesian Marine Police patrols on the Phillip Channel have effectively suppressed vessel boardings on the Singapore Strait in August following arrests of members of two gangs on Batam in July.
- During the past twelve months, 83% of the 155 incidents reported in the region have taken place in the Singapore Strait, analysed in detail in the Assessment section.
- There have been no hijackings in South East Asia since the September 2024 Tug ROYAL TB 17 incident on the Java Sea, during which the hijackers sought the biofuel cargo in the barge.
- China intensified its military posture around Taiwan, deploying aircraft and naval assets in greater numbers than in previous months, and continued its provocations of the Philippine Navy, analysed in more detail under 'Political Developments'.

Events included in this report occurred between 1 and 31 August 2025, shown on the map below. Further incident details are available on the Risk Intelligence System.



Source: Risk Intelligence System

Incidents

3 August - Barge LKH 2882 boarded underway
Theft, Singapore Strait

28 August - Bulk carrier GEORGITSI boarded underway
Failed theft, Singapore Strait

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

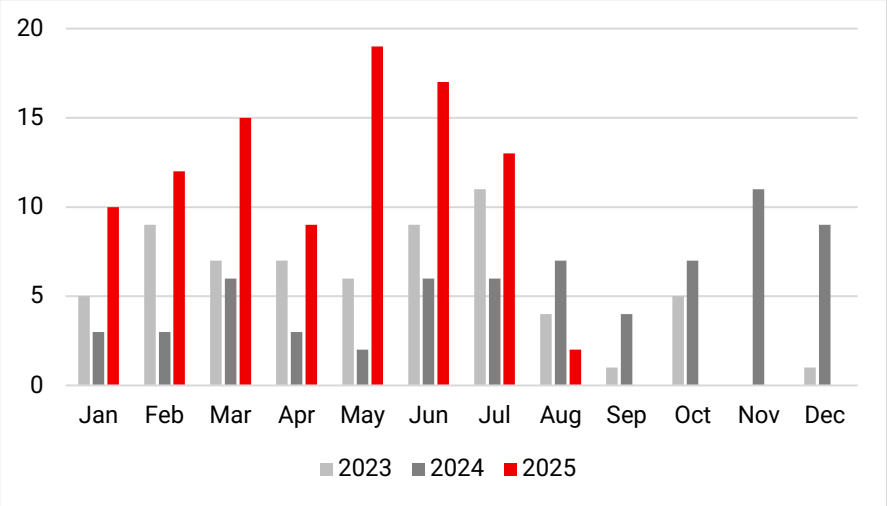
The upward trend of Singapore Strait vessel boardings that began in November 2024 saw a drastic decline in August following law enforcement initiatives on Batam Island, Indonesia. In July, the Indonesian Marine Police (IMP) arrested members of two gangs suspected of targeting ships in the Singapore Strait. This initiative, enhanced by an increase of patrols by the IMP on the Phillip Channel, resulted in only two reported incidents during August.

Previously, incident-free periods on the Singapore Strait have occurred following similar law enforcement initiatives. In that context, this 50-day period during which no cargo ships were boarded exceeds the 38-day incident-free period that followed arrests in April 2024. The lengthiest incident-free period in recent years lasted for 139 days, following the arrests of gang members based on Karimun in November 2015.

There are two factors contributing to the current lower frequency of vessel boardings on the Singapore Strait. Although they are still at large, perpetrators have lost access to their criminal intermediary in Jakarta, who had been converting stolen shipboard property into cash. Additionally, the sustained presence of IMP patrols along the eastbound lane of the Singapore Strait Traffic Separation Scheme, particularly in the Phillip Channel, continues to deter opportunistic activity. Absent either factor, the prospect of renewed boardings is likely to rise.

If the Indonesian Marine Police succeed in arresting members of the remaining gangs operating from Batam, this could result in a significant reduction in the frequency of boardings during the remainder of this year. Knowing that perpetrators remain at large, vessel operators are still well advised to arrange for appropriate anti-piracy measures on ships navigating the strait.

Evidence seized during the latest arrests confirms 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 erratic and 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.



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

Turning to the previous 12 months, 83% of the 155 incidents reported in Southeast Asia have taken place in the Singapore Strait. Of the 128 incidents in the strait, 75 involved bulk carriers, 31 involved tankers, 9 involved barges and other craft in tow and 10 involved container ships. The outliers involved three general cargo vessels. No incidents involving passenger vessels have occurred in the Singapore Strait. All Singapore Strait incidents during this period targeted ships underway, with 89% 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.

Hijacking

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, as illustrated by the related developments below that took place during August.

China intensified its military posture around Taiwan, deploying aircraft and naval assets in greater numbers than in previous months. Military aircraft continued to cross the Taiwan Strait's median line almost daily, while naval vessels and China Coast Guard units maintained a persistent presence near Taiwan's offshore islets, including Kinmen and the Pratas. These actions coincided with Taiwan's ongoing reserve force mobilisation and asymmetric training initiatives and appeared designed to normalise military activity while signalling deterrence against expanding regional defence cooperation, particularly between Taiwan and the Philippines.

Kim Jong-Un inspects the destroyer CHOE HYON (Photo: KCNA)

Taiwan's defence ministry shifted focus from large-scale exercises to post-Han Kuang evaluations and civil-military integration efforts. Local governments conducted follow-up resilience drills, including shelter

coordination and emergency logistics rehearsals, aimed at refining urban defence protocols. The Taipei MRT system was spotlighted for its strategic utility in wartime transport scenarios, reinforcing Taiwan's emphasis on dual-use infrastructure.

Public messaging also intensified around asymmetric defence, with officials promoting community-level preparedness and digital literacy as key components of national security. These efforts reflect Taiwan's continued investment in decentralised, whole-of-society defence beyond conventional military frameworks.

North Korea continued to showcase its expanding military capabilities, with leader Kim Jong Un personally overseeing the test-firing of two newly developed air-defence missiles. State media claimed the systems demonstrated "superior combat capability" against aerial threats such as drones and cruise missiles. The tests coincided with U.S.–South Korean exercises, which Pyongyang denounced as provocative. Kim also inspected the CHOE HYON-class destroyer, reiterating calls for a rapid expansion of nuclear armament and signalling that naval modernisation remains central to North Korea's strategic posture.

Tensions between China and the Philippines continued following an incident near Scarborough Shoal on 11 August, when a Chinese Coast Guard vessel collided with a Chinese Navy destroyer during a high-speed pursuit of the Philippine patrol ship BRP SULUAN. The collision, which left the coastguard ship CG3104 heavily damaged, was captured on video and widely circulated by the Philippine Coast Guard.

Manila described the crash as the result of reckless Chinese manoeuvres, while Beijing deflected blame and accused the Philippines of "dangerous provocations". The incident marked the first known collision between Chinese vessels in the contested waters and underscored the growing operational risks of China's aggressive enforcement tactics. Philippine officials reiterated their commitment to defending sovereignty within their EEZ and cited the 2016 arbitral ruling as the legal basis for continued patrols around Scarborough Shoal.

US–Philippine defence cooperation deepened amid continued tensions in the South China Sea. Discussions between senior officials focused on expanding missile system deployments along Philippine coastlines facing contested waters. Ambassador Jose M. Romualdez emphasised that US investment in Philippine infrastructure and defence industries would reinforce regional deterrence. These developments followed renewed U.S. assurances that the mutual defence treaty covers armed attacks on Philippine public vessels anywhere in the South China Sea.

Continuing related work conducted in July, ASEAN and China convened a meeting to advance negotiations on the Code of Conduct (COC) for the

South China Sea. Delegates agreed to accelerate consultations with the aim of finalising the COC ahead of the 2026 target. Discussions focused on enhancing maritime stability, promoting restraint, and expanding cooperation in various areas. The meeting reinforced ASEAN's commitment to a rules-based regional order, while Malaysia continued to play a central role in shaping the next phase of negotiations.

China and Indonesia continued to advance their strategic partnership through a series of diplomatic exchanges marking Indonesia's 80th Independence Day and the 75th anniversary of bilateral relations. Chinese President Xi Jinping and Prime Minister Li Qiang sent formal congratulations to President Prabowo Subianto, reaffirming their commitment to deepening cooperation across five key pillars: politics, economy, cultural exchange, maritime affairs, and security.

Maritime cooperation featured prominently, with both sides pledging to expand joint efforts in marine scientific research, environmental protection, and maritime safety. Discussions also emphasised coordination between the Indonesian Maritime Security Agency (BAKAMLA) and the China Coast Guard, reflecting a shared interest in regional stability. This underscores growing convergence in strategic outlook, particularly in the maritime domain, as both nations seek to balance regional influence with practical collaboration.

Overall developments highlight ongoing tensions, provocations, 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. 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 also low, particularly within the designated transit corridors. Fishing trawlers remain vulnerable, similar to other small craft, tugs, ferries and locally-trading vessels.

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 the threats of piracy and armed robbery at sea in various forms but does not include other threats to merchant vessel operations such as 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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