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MARITIME THREATS AND
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ESCALATING THREATS AND VIOLENCE AROUND AFRICA AND YEMEN

MARITIME PIRACY & CRIME

The Increasing Threats and Violence Against U.S. and Other Allied Vessels Traveling Maritime Trade Routes Around Africa and Yemen.

As of April 2025, the maritime security environment across the Red Sea, Gulf of Aden, Arabian Sea, and broader waters off the coast of Africa is increasingly unstable due to a confluence of piracy, insurgent activity, and regional conflict. This briefing outlines the primary threats affecting international shipping and strategic maritime chokepoints.

The most prominent threat stems from Yemen's Houthi rebels, who have dramatically escalated attacks against commercial shipping in the Red Sea and Gulf of Aden. Originally targeting vessels with direct or indirect Israeli ties, the Houthis have widened their scope, indiscriminately targeting international shipping to exert geopolitical pressure. These attacks have included missile and drone strikes, hijackings, and the use of fast boats, disrupting maritime trade routes and threatening freedom of navigation in one of the world's most critical maritime arteries.

Simultaneously, piracy off the Somali coast has seen a resurgence after years of decline, with multiple hijacking attempts and incidents targeting vulnerable vessels. The relative vacuum created by the redeployment of naval forces to counter Houthi threats may be contributing to renewed pirate activity.

In response, multinational coalitions have mobilized robust naval operations, including Operation Prosperity Guardian (U.S.-led), Operation Aspidos (EU-led), and the longstanding Operation Atalanta focused on piracy deterrence. These missions aim to safeguard maritime transit, provide escort to civilian vessels, and collect intelligence to suppress threats. However, the persistent and adaptive nature of these adversaries underscores the limitations of current security frameworks and the need for greater international cooperation.

The ripple effects of these threats are being felt globally. Major shipping lines are rerouting vessels around the Cape of Good Hope, adding up to two weeks to transit times, significantly raising costs, and exacerbating supply chain delays. This situation not only affects global trade but also undermines the security and economic stability of littoral nations reliant on safe and secure sea lanes.

In summary, maritime threats around Yemen and the Horn of Africa have evolved from isolated incidents into a sustained campaign that is reshaping maritime security paradigms.

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Effective risk mitigation will require enhanced military presence, expanded international coordination, improved intelligence sharing, and long-term regional stability efforts.

HOUTHİ MARİTİME THREATS İN THE RED SEA AND GULF OF ADEN

Since late 2023, the maritime threat posed by Yemen's Iran-aligned Houthi movement has escalated significantly, transforming the Red Sea and Gulf of Aden into one of the most dangerous maritime zones in the world. The Houthis initially justified their attacks as acts of solidarity with Palestinians during the Israel-Gaza conflict. However, their operational targeting has broadened significantly to include commercial vessels of various nationalities, often without direct links to Israel. This has created a state of persistent threat for virtually all commercial shipping through the Bab al-Mandab Strait—a key strategic chokepoint connecting the Indian Ocean to the Mediterranean via the Suez Canal.

Tactics and Capabilities. The Houthis have employed a wide array of asymmetric warfare tactics in the maritime domain:

- **Missile and Drone Strikes:** Using land-based cruise and ballistic missiles, along with long-range UAVs, Houthis have successfully targeted and damaged merchant vessels transiting through the southern Red Sea. These strikes often originate from launch sites in western Yemen.
- **Explosive-Laden Unmanned Surface Vessels (USVs):** The group has deployed remote-controlled boats packed with explosives to target large commercial ships and naval escorts.
- **Hijackings and Boarding Operations:** One of the most high-profile incidents was the hijacking of the *Galaxy Leader* in November 2023. The vessel was forcibly diverted to Houthi-controlled territory, and the crew held hostage for over a year. This event marked a significant escalation in the group's ability to conduct complex maritime operations.
- **Threat of Sea Mines:** Although no confirmed cases have occurred recently, intelligence reports suggest the Houthis have stockpiled naval mines, which pose an additional hazard to navigation.

Operational Patterns and Areas of Risk. Attacks have been concentrated in:

- **The Bab al-Mandab Strait:** Narrow (approximately 20 miles wide) and heavily trafficked, this chokepoint remains a critical target zone due to its strategic importance.
- **Southern Red Sea:** Including international shipping lanes east of Eritrea and west of Yemen's coastline.
- **Approaches to Yemeni Ports (e.g., Al Hudaydah and Mocha):** These areas serve as launching points for Houthi weapon systems.

Notably, the Houthis have shown increasing proficiency in identifying and tracking vessels through open-source intelligence, AIS data, and satellite imagery, allowing them to selectively target high-value or symbolic ships.

Strategic Intentions and External Support. The Houthi campaign is not only a tactical effort but also a strategic move aimed at:

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- Disrupting global supply chains to pressure Western governments.
- Gaining leverage in ongoing political negotiations concerning Yemen's civil war.
- Cementing their status as a regional power aligned with Iranian interests.

Iran's material support to the Houthis, including the transfer of drone and missile technology, has significantly enhanced their maritime strike capabilities. Western naval intelligence has drawn parallels between Houthi strike patterns and tactics used by Iranian IRGC units, reinforcing concerns of proxy coordination.

Impact on Commercial Shipping

- **Rerouting Around the Cape of Good Hope:** Major carriers (e.g., Maersk, Hapag-Lloyd) have diverted vessels to avoid the Red Sea, increasing shipping times by 10–14 days and inflating costs by as much as 50% for certain cargo categories.
- **Insurance Premium Hikes:** War risk premiums for transiting vessels have skyrocketed, reaching unprecedented levels since January 2024.
- **Crew Safety Concerns:** Shipping unions and seafarer organizations have raised alarms about the psychological toll and physical risks faced by crews operating in high-threat zones.
- **Global Economic Ripple Effects:** The disruptions have impacted the timely delivery of energy supplies, containerized goods, and humanitarian aid shipments, especially to East Africa and the Arabian Peninsula.

RESURGENCE OF PIRACY NEAR THE HORN OF AFRICA

After nearly a decade of relative calm in the western Indian Ocean, the threat of piracy off the coast of Somalia and around the Horn of Africa is once again on the rise. A combination of regional instability, reduced international naval presence, and shifting attention toward Red Sea security has allowed pirate networks to reconstitute and reassert influence over key maritime corridors.

Recent Incidents and Tactical Shifts. In 2024 and early 2025, at least **seven confirmed piracy incidents** were reported in the waters off Somalia and Yemen. These included:

- **March 2024** – Somali pirates attempted to board a Liberian-flagged bulk carrier 300 nautical miles southeast of Eyl, Somalia. Armed guards onboard repelled the attack with no casualties.
- **January 2025** – A Yemeni fishing vessel was hijacked near Eyl and used as a mother ship for further pirate operations before being intercepted by EU naval forces.
- **February 2025** – An oil tanker reported a suspicious approach by multiple small skiffs in the Gulf of Aden. A warning shot by a private security team onboard prevented boarding.

These incidents show a return to older tactics involving “swarming” by multiple small high-speed boats launched from converted fishing dhows or hijacked vessels acting as mother ships. Pirates remain opportunistic—targeting vessels with low freeboard, slow speeds, and insufficient onboard security.

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Contributing Factors to Pirate Resurgence

1. **Security Gaps:** The redirection of naval forces (especially U.S. and European assets) toward the Red Sea in response to Houthi attacks has left areas of the Somali Basin and Indian Ocean under-patrolled. Pirates are capitalizing on reduced surveillance and naval interdiction.
2. **Economic Deprivation and Lawlessness in Somalia:** The persistent collapse of governance in large parts of Somalia has allowed criminal syndicates to operate with impunity. Poverty, lack of alternative income sources, and recruitment by warlords continue to fuel piracy.
3. **Use of AIS Manipulation and Ghost Shipping Tactics:** Pirates increasingly use deceptive means to track and identify high-value targets. Some hijacked vessels have been used to lure and ambush other ships under false distress calls.
4. **Reduced International Attention:** While piracy off Somalia once drew significant global focus, particularly between 2009–2012, attention has since shifted toward West African piracy and now Red Sea threats, weakening the deterrence effect.

Operational Zones and Risk Areas. The resurgence is most notable in the following areas:

- **Somali Basin** – Particularly east and southeast of Eyl and Hobyo, where pirates have historically launched long-range attacks.
- **Gulf of Aden** – Pirates operating here are blending in with local fishing traffic, making detection harder.
- **Mozambique Channel (Emerging Concern)** – Though not directly linked to Somali piracy, instability in northern Mozambique has led to isolated maritime security threats, which could evolve into organized piracy over time.

Impact on Commercial Shipping

- **Heightened Threat Perception:** Shipowners are increasingly concerned about multi-vector maritime threats—piracy from the south and Houthi attacks from the north—creating a “double choke” in the Arabian Sea.
- **Rerouting Costs and Delays:** Vessels are altering routes and speeds to minimize exposure, impacting delivery schedules and increasing fuel and insurance costs.
- **Onboard Security Measures:** There’s renewed demand for armed private maritime security contractors (PMSCs) and onboard deterrence equipment such as citadels, barbed wire, and LRADs (Long-Range Acoustic Devices).
- **Seafarer Fatigue and Morale Issues:** The stress associated with navigating high-risk waters is once again becoming a pressing concern for shipping companies and unions.

International Naval and Legal Responses

- **EUNAVFOR Operation Atalanta** has responded by increasing patrols in known hot zones and reactivating cooperative threat assessment with industry groups such as BIMCO and the Maritime Security Centre – Horn of Africa (MSCHOA).
- **Indian Ocean Rim States** have been urged to enhance maritime domain awareness (MDA) through shared radar and satellite surveillance, though resource constraints persist.

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- **Legal Challenges Remain:** Although frameworks like the Djibouti Code of Conduct and the Seychelles' piracy courts have made progress, regional legal systems still face difficulties in detaining, prosecuting, and convicting apprehended pirates.

INTERNATIONAL NAVAL OPERATIONS AND RESPONSES

In response to the escalation of maritime threats in the Red Sea, Gulf of Aden, and off the Horn of Africa, an array of multinational naval operations have been mobilized to secure sea lanes, deter aggression, and provide rapid response to incidents. These missions represent the largest collective naval mobilization in the region since the peak of Somali piracy over a decade ago. However, despite growing international presence, coordination, rules of engagement, and operational effectiveness vary widely across missions.

Key Multinational Operations

Operation Prosperity Guardian (U.S.-led). Launched in late 2023, Operation Prosperity Guardian (OPG) is a coalition maritime security initiative spearheaded by the United States under the framework of the Combined Maritime Forces (CMF) and Combined Task Force 153.

- **Mission Focus:** Protect commercial shipping from Houthi missile, drone, and surface attacks in the Red Sea and Bab al-Mandab.
- **Participating Nations:** U.S., UK, France, Bahrain, Italy, and others.
- **Assets Deployed:** Includes U.S. Navy destroyers (e.g., USS *Carney*), carrier strike groups, and advanced drone defense platforms.
- **Challenges:** Restricted rules of engagement and hesitation by some allies to confront Houthi threats directly have limited effectiveness.

Operation Aspides (EU Naval Mission in the Red Sea). Officially launched in early 2024 by the European Union, Operation Aspides is focused on securing EU merchant shipping in the Red Sea and Gulf of Aden.

- **Mission Focus:** Defensive protection of EU-flagged vessels and enforcement of maritime security.
- **Contributing Countries:** France, Italy, Greece, Germany, and others.
- **Capabilities:** Frigates equipped with anti-missile systems and naval helicopters, integrated with satellite surveillance.
- **Coordination:** Operates alongside OPG but retains independent command structure and narrower engagement mandate.

EUNAVFOR Operation Atalanta. Initially established in 2008, Operation Atalanta has been revitalized in response to renewed piracy threats near Somalia.

- **Mission Focus:** Deterrence and suppression of piracy and armed robbery at sea in the Western Indian Ocean.
- **Recent Developments:** Shifted patrols eastward to cover new pirate hotspots and coordinated with regional coast guards and commercial shipping routes.
- **Legal Authority:** Maintains agreements with regional partners (e.g., Seychelles) for detaining and prosecuting pirates.

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CMF (Combined Maritime Forces). Headquartered in Bahrain, CMF consists of over 30 member nations working to secure international waters across the Middle East.

- **CTF 150:** Focuses on maritime security and counterterrorism in the Arabian Sea and Indian Ocean.
- **CTF 151:** Dedicated to counter-piracy operations.
- **CTF 153:** Red Sea security and safe passage for commercial shipping.
- CMF offers a flexible, task-force driven response model, though challenges remain in harmonizing national interests.

Challenges Facing Naval Coalitions

- **Divergent Political Will:** While some nations actively engage in interdictions and escorts, others limit involvement to observation or patrols due to domestic political constraints or neutrality.
- **Rules of Engagement (ROE):** Variations in ROE between nations restrict rapid joint action. For instance, some navies may not engage unless directly fired upon, reducing deterrence.
- **Resource Allocation:** As naval assets are increasingly stretched thin—especially with simultaneous crises in Ukraine, the Indo-Pacific, and the Red Sea—force availability is under pressure.
- **Information Sharing and Interoperability:** Efforts are ongoing to bridge gaps in communication systems, tactical coordination, and threat intelligence, though friction persists.

Support from Private Sector and NGOs

- **Private Maritime Security Companies (PMSCs)** are seeing a resurgence in demand to provide armed guards and threat mitigation services aboard vulnerable vessels.
- **International Maritime Organizations**, including the International Maritime Organization (IMO) and BIMCO, have issued updated navigational warnings, recommended rerouting, and enhanced guidance under **BMP5 (Best Management Practices for Protection Against Somali Piracy)** and **Red Sea-specific advisories**.
- **Voluntary Reporting Schemes** such as UKMTO (UK Maritime Trade Operations) and MSCHOA (Maritime Security Centre – Horn of Africa) continue to play a critical role in real-time threat tracking and coordination between ships and naval assets.

Strategic Outcomes and Recommendations

- **Improved Command Integration:** There is increasing momentum for creating a joint command coordination center to oversee multi-coalition operations across all impacted maritime domains.
- **Expansion of Naval Escorted Transit Corridors (ETCs):** Several coalitions are now offering dedicated protection convoys for merchant vessels, particularly through high-risk areas near the Bab al-Mandab.
- **Long-Term Engagement with Regional Partners:** Naval missions are now focusing not just on direct intervention but on training, capacity-building, and joint exercises with navies from Djibouti, Kenya, Oman, and Seychelles to improve local security infrastructure.

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IMPLICATIONS FOR MARITIME SHIPPING

The dual threats of Houthi attacks in the Red Sea and piracy resurgence off the Horn of Africa are having profound and far-reaching impacts on global maritime shipping. These threats have disrupted vital sea lanes, forced changes in maritime operations, and introduced new levels of risk and uncertainty for the commercial shipping industry. As a result, both the costs and complexity of global maritime logistics have increased substantially.

1. Rerouting of Global Trade Flows

- **Shift Away from the Suez Canal Route:** A significant number of major shipping lines—including Maersk, MSC, CMA CGM, and Hapag-Lloyd—have rerouted vessels around the Cape of Good Hope to avoid the Red Sea, bypassing the Suez Canal.
 - This detour adds **10–14 days** to average transit times between Asia and Europe.
 - It increases fuel consumption and emissions by over **30%**, impacting both cost and sustainability targets.
 - The Suez Canal Authority has reported a **substantial drop in transit revenue** since late 2023, illustrating the scale of the diversion.
- **Congestion at Alternative Ports:** Ports in Southern Africa (e.g., Durban, Cape Town) and Oman (Salalah) are experiencing increased congestion and logistical strain due to the rerouting of traffic away from traditional Red Sea routes.

2. Increased Operational Costs

- **Fuel and Insurance:** The rerouting combined with the threat environment has led to:
 - A **doubling or tripling of war risk insurance premiums** for transits through the Red Sea and Gulf of Aden.
 - Higher fuel costs due to longer voyages and increased speeds through high-risk areas (a common evasive measure).
- **Security Expenditures:** Many vessels are now sailing with:
 - **Armed security teams**, typically provided by private maritime security companies (PMSCs).
 - **Defensive enhancements**, such as citadels, barbed wire, LRADs, and enhanced bridge watches.
- **Crew Compensation and Welfare:** Vessels transiting high-risk waters often pay **hazard pay**, increasing wage bills. Crew welfare concerns are rising as fatigue, mental stress, and perceived abandonment by international institutions become more common.

3. Supply Chain Disruptions

- **Delays in Cargo Delivery:** Essential goods—especially automotive components, electronics, consumer goods, and medical supplies—have faced significant delays in Europe, Africa, and the Middle East.
- **Food and Fuel Supply Challenges in East Africa and Yemen:**
 - Humanitarian aid shipments to Yemen, Djibouti, and Somalia have been delayed or rerouted, worsening food insecurity.
 - Some fuel shipments have been rerouted to avoid the risk of being targeted, causing price fluctuations in local markets.

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- **Just-in-Time Logistics at Risk:** Companies relying on predictable, tight-schedule supply chains (e.g., automotive, aerospace, retail) are now forced to either stockpile inventory or accept significant delivery variability, impacting bottom lines.

4. Changes in Ship Routing and Behavior

- **Increased Use of AIS Discretion:** Many vessels are selectively turning off Automatic Identification Systems (AIS) in high-risk zones to avoid detection and targeting, although this reduces visibility for naval and port authorities.
- **Convoy Operations and Group Transits:** Vessels are increasingly seeking coordinated transit with naval escorts or convoys when passing through known threat zones—especially in the Bab al-Mandab and southern Red Sea.
- **Heightened Vigilance and Pre-Transit Planning:** Ships are engaging in extensive pre-transit risk assessments, including routing consultations with organizations like UKMTO and MSCHOA.

5. Industry and Market Repercussions

- **Freight Rate Volatility:** Spot freight rates for container shipping between Asia and Europe have surged by as much as **300%** since late 2023, with similar rises in bulk and tanker markets.
- **Vessel Availability and Charter Market Disruption:** The diversion of vessels has created a shortage of available tonnage, especially for time-sensitive cargo, impacting charter rates and contract availability globally.
- **Increased Demand for Insurance and Legal Services:** Maritime law firms and insurers are handling a surge in claims related to war risk, rerouting disputes, and cargo loss or delay due to hostile activity.

6. Strategic Shifts in Maritime Risk Management

- **Expansion of High-Risk Area Definitions:** Several insurers and shipping associations have redefined the geographical extent of High Risk Areas (HRAs) to include broader swathes of the Red Sea and Arabian Sea, influencing coverage, planning, and compliance requirements.
- **Growing Role of Cybersecurity:** As shipping operations become more digitized, concerns about Houthi and proxy actors potentially using cyber tactics to disrupt shipping systems (e.g., ECDIS, AIS spoofing, or port infrastructure) are growing.
- **Legal and Regulatory Adjustments:**
 - Some flag states are revisiting their policies on arming civilian vessels.
 - International regulators (IMO, BIMCO) are reviewing guidance and may issue new directives in light of sustained threats.

CONCLUSION

The maritime threat environment surrounding Africa and Yemen has entered a phase of heightened volatility with significant global repercussions. The persistent threat posed by the Houthis in the Red Sea and Gulf of Aden, alongside the re-emergence of piracy off Somalia, signals a multifaceted maritime security crisis. These threats, though distinct in origin and execution, share common consequences: disruption of international trade, increased

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insurance and shipping costs, and heightened risk to seafarers and commercial vessels transiting some of the world's most vital sea lanes.

Despite the commendable efforts of multinational coalitions—such as Operation Prosperity Guardian, Operation Aspides, and Operation Atalanta—the challenges are dynamic and adaptive. The Houthis have shown a sophisticated capacity to project force using a combination of missile technology, drones, and guerrilla maritime tactics, often with political backing and strategic calculation. Somali piracy, while less technologically advanced, remains opportunistic and lethal, benefiting from lawlessness onshore and lapses in naval coverage offshore.

Given the enduring nature of these threats, the following strategic priorities are recommended:

- **Enhanced Naval Coordination:** Expand rules of engagement and interoperability among coalition partners. Joint operations, unified command structures, and shared intelligence platforms are critical to prevent threat actors from exploiting gaps in coverage or response time.
- **Commercial Shipping Protocols:** Shipping companies should continue to apply Best Management Practices (BMP5), including evasive routing, increased onboard security, and liaison with maritime security centers. Transparent tracking and real-time communication with naval escorts are essential.
- **Regional Capacity Building:** Long-term solutions must include investment in regional maritime security capabilities. This includes support for coastal state navies, legal frameworks for prosecution of piracy, and stabilization efforts in Yemen and Somalia to address the root causes of maritime insecurity.
- **Economic and Trade Implications:** Governments and international institutions must prepare for sustained disruptions in global shipping routes. Alternative logistic corridors and contingency planning for critical goods, especially oil, gas, and food, will be crucial.

In conclusion, the waters surrounding Africa and Yemen are at a strategic crossroads—geographically and geopolitically. Left unchecked, these maritime threats have the potential to escalate into broader regional instability. A coordinated, sustained, and forward-leaning approach from the international community will be essential to restore maritime security, uphold freedom of navigation, and protect the global economy.

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