

RiskIntelligence

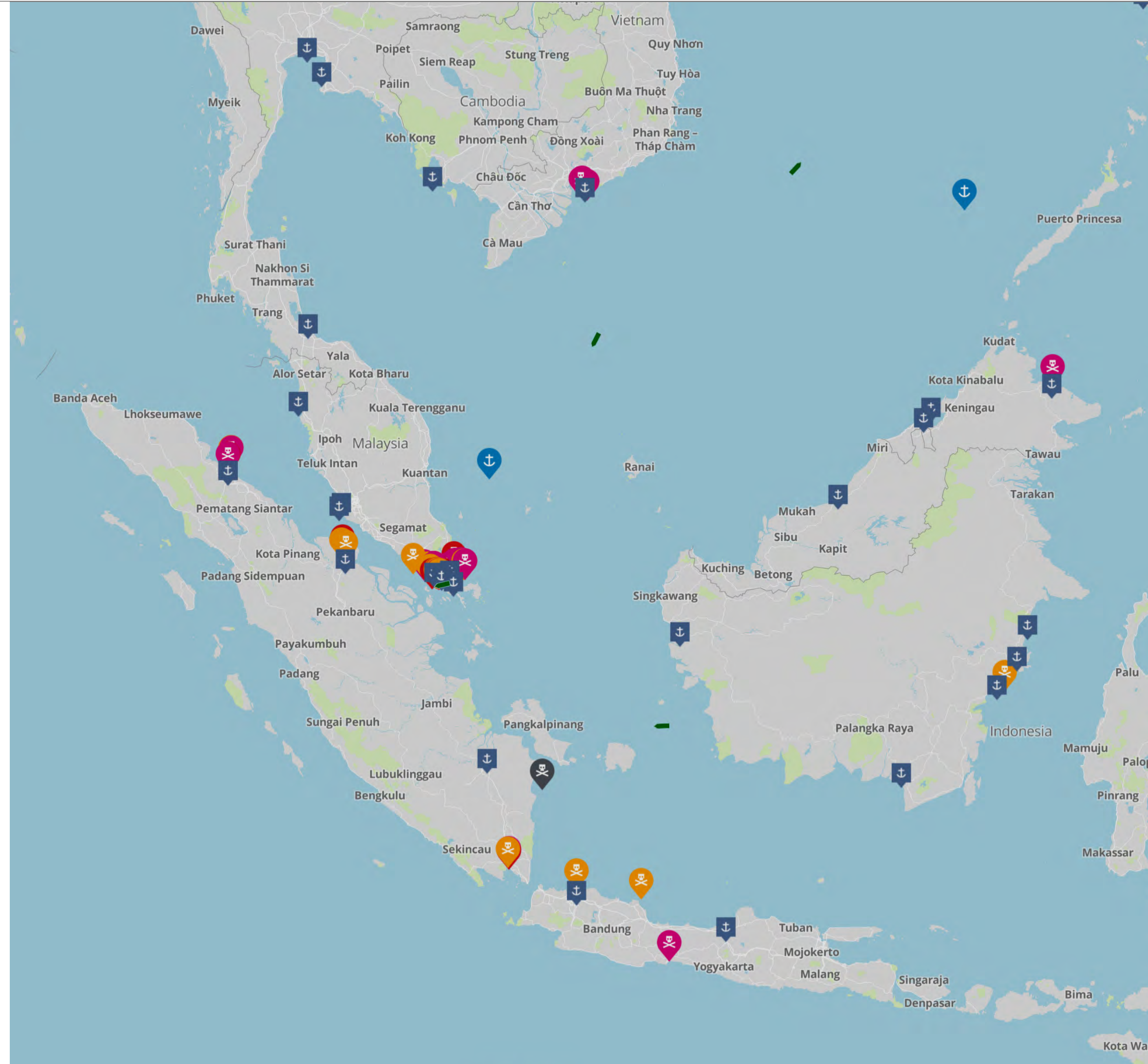
Maritime threats and security trends

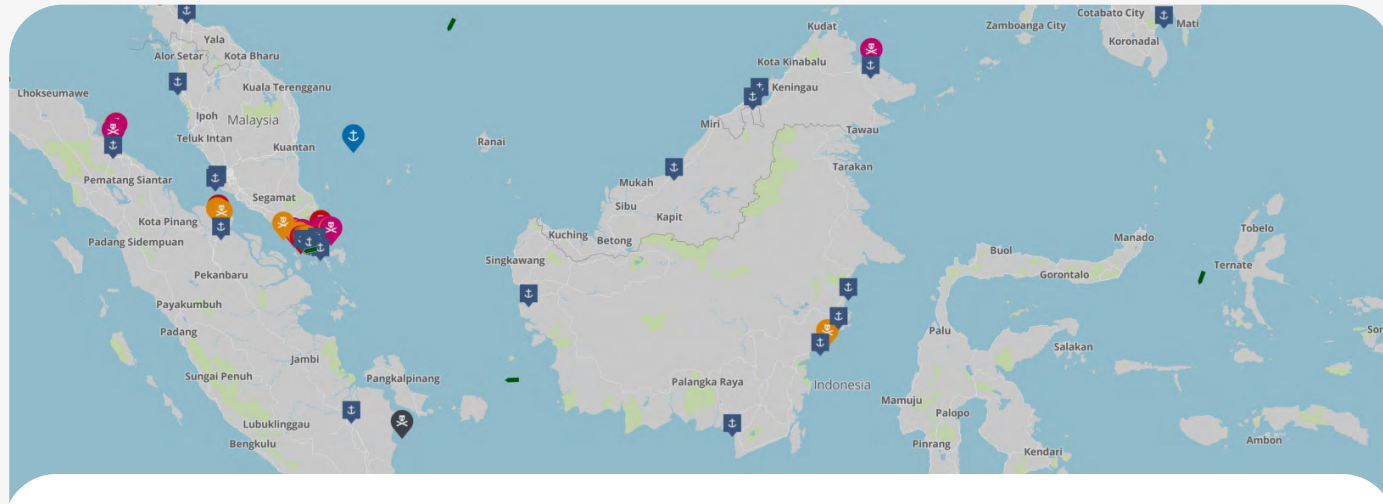
Annual incident figures 2023



Piracy

South East Asia





South East Asia

↑ 52%

increase in **armed robbery and theft**

A total of **66 armed robberies** and thefts was reported throughout Southeast Asia in 2023 of which **38% took place at anchorages**.

INSIGHT

While the 104 incidents recorded in 2023 reflect an increase of 20% as compared with 87 recorded incidents in 2022, the significance of the threats faced by crew on board cargo vessels is more serious.

For example, the number of armed robberies rose by 31%, while the number of incidents in which property was stolen rose by 52%. Meanwhile, the number of boardings in which no property was stolen, a category likely to be under-reported, decreased by 14%. Although no property was stolen in these incidents, 18 cases involved armed perpetrators, representing a 29% increase compared with the 2022 figures. In 2023, as was the case in 2022, there was one hijacking: a tug and barge in 2023 and a bunker barge in 2022.

Kidnappings of seafarers have ceased since 2020.

The Singapore Strait remains the site of the highest frequency of vessel boardings, representing 63% of the total in 2023, where most incidents involve vessels that are underway. It is unlikely that this situation will change significantly in the coming months.

+20%

104 incidents recorded

+31%

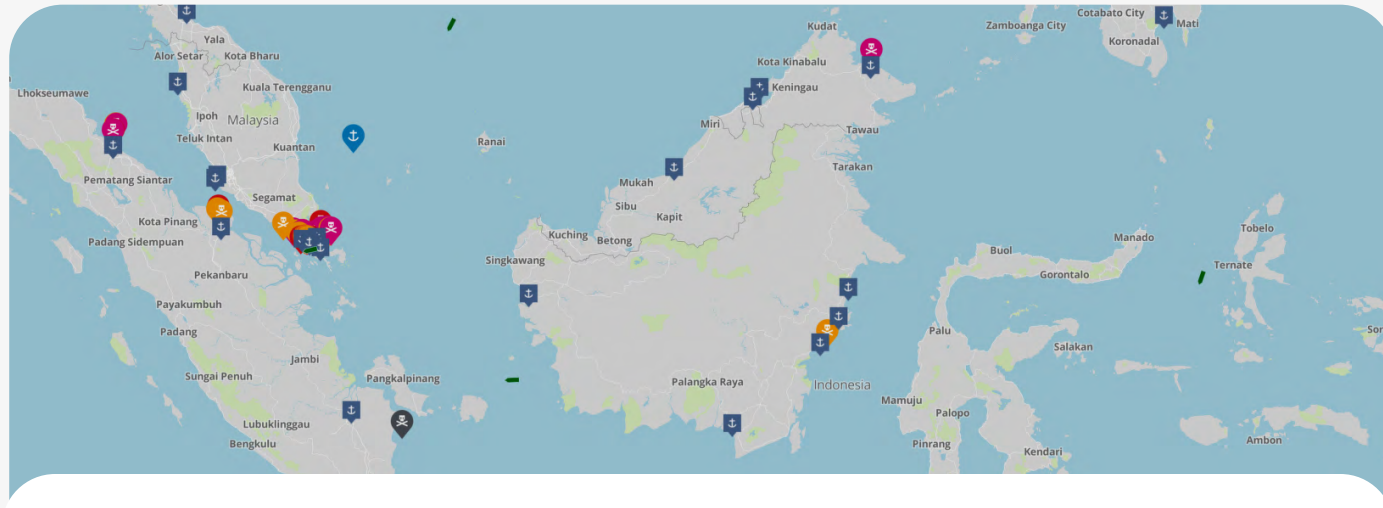
Armed robberies

+52%

Rise in stolen property

-14%

Decrease in boardings in which no property was stolen



South East Asia

63%

of all incidents in South East Asia took place within the Singapore Strait

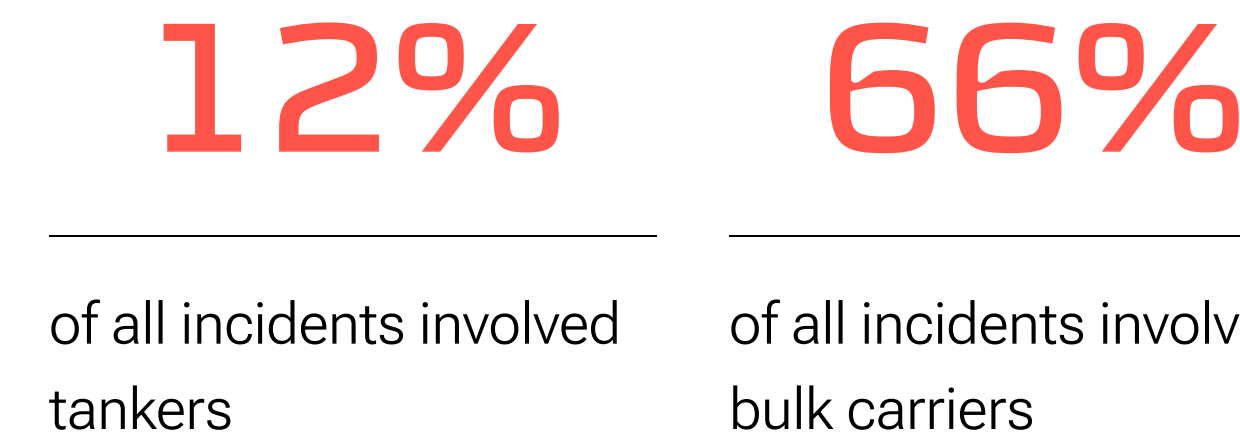
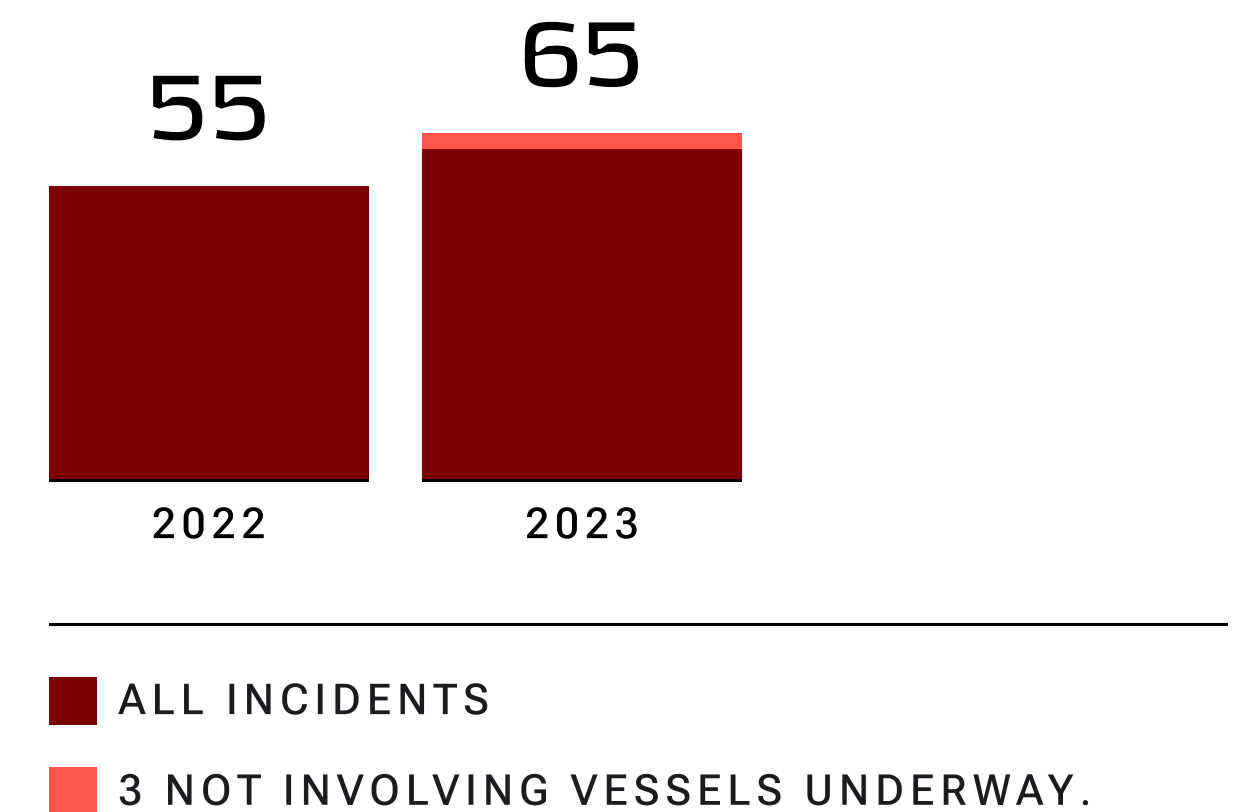
With **over half of the incidents** in Southeast Asia taking place within the **Singapore Strait**, the area will continue to be the **focus of concern in 2024**.

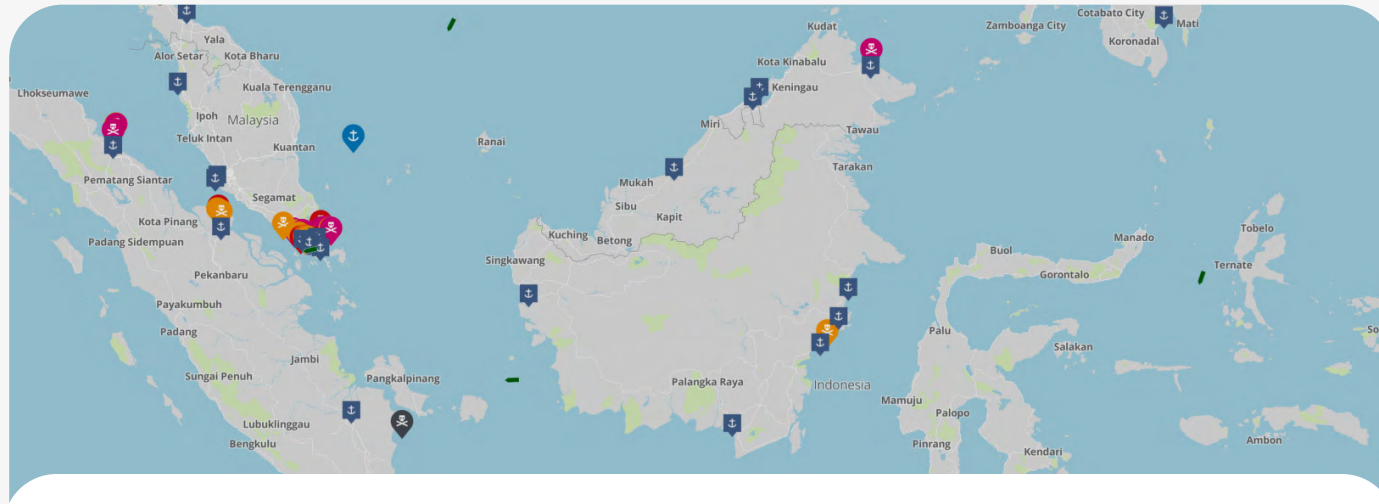
INSIGHT

During 2023, bulk carriers and barges experienced the highest frequency of boardings.

Only eight incidents during the year involved tankers (12%). Bulk carriers were targeted by perpetrators in 43 incidents (66%) while 12 incidents involved barges (18%). Like in 2022, no container vessels or cruise ships were boarded in the Singapore Strait. Meanwhile, many of the incidents in the Singapore Strait were failed attacks, which could illustrate a higher level of awareness amongst crew on board the vessels in transit, although the number of armed perpetrators involved in the failed attacks increased by 29%. Compared with the 27 failed attacks (42%), there were 26 thefts (40%) and 12 armed robberies (18%). It is likely that perpetrators are carrying knives during virtually all boardings of merchant ships, even though these are not always observed by the crew.

Together with an increase in the frequency of incidents (65 cases in 2023 compared with 55 incidents in 2022), there were **only three incidents that did not involve vessels underway**.





South East Asia

↑ 18%

increase in Singapore Strait incidents

65 incidents in total of which **66% targeted bulk carriers** and **18% barges**; **58% are thefts and armed robberies**

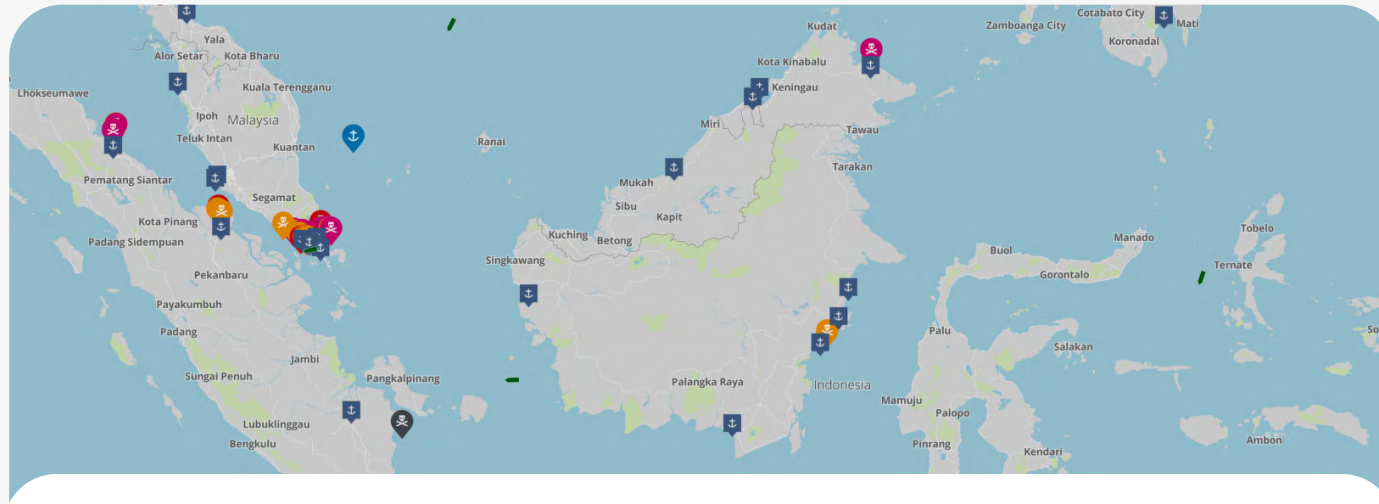
INSIGHT

At face value, the 18% increase in the total number of incidents recorded in the Singapore Strait is worrisome, particularly when noting that

58%

of these incidents **involved thefts and armed robberies**

Also of concern is the increase of armed robberies in particular by 50%. At the same time, incidents of crew being injured are rare. The perpetrators' continued focus on bulk carriers and barges is expected to continue in 2024 as these are relatively simple targets. As in previous years, the challenges for law enforcement agencies posed by the intersecting borders of Indonesia, Malaysia and Singapore within the Singapore Strait will continue to stymie the hot pursuit of perpetrators. Vessels in transit are most vulnerable, highlighted by the fact that all but three incidents involved vessels underway in 2023. No container or cruise ships were boarded in this area in 2023. The high frequency of failed attacks in the Singapore Strait might illustrate a high level of awareness amongst crew on board the vessels in transit. Although no weapons were observed by the crew in many cases, it is likely that perpetrators are carrying knives in virtually all cases and they are prone to use these against crew members if confronted.



INSIGHT

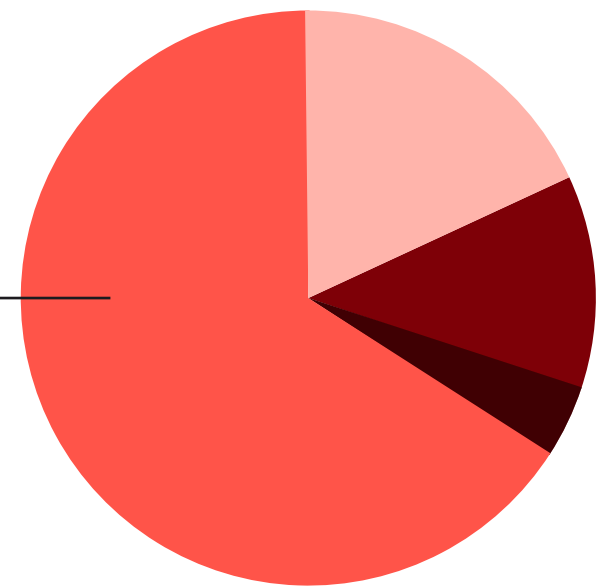
Operators of bulk carriers are well-advised to ensure enhanced awareness amongst crew on board vessels transiting the Singapore Strait.

With an overall 18% year-on-year increase in the total number of incidents recorded there, perpetrators maintained their attention on bulk carriers which accounted for 66% of all Singapore Strait boardings while tankers accounted for merely 12% of all incidents. The vulnerability is higher during hours of darkness, when perpetrators take advantage of slow-moving vessels passing through this bottleneck, also leveraging the jurisdictional challenges posed by the intersecting borders of Indonesia, Malaysia and Singapore. The Singapore Strait is the site of 63% of all recorded incidents within South East Asia. Despite the significant increase of attacks, 42% are failed, indicating that a vigilant crew is an effective deterrent. No container or cruise ships were boarded in this area in 2023.

South East Asia

66%

OF ALL ATTACKS IN SINGAPORE STRAIT TARGET BULK CARRIERS



18% TUGS/BARGES

12% TANKERS

4% OTHER



MARITIME SECURITY ANNUAL INCIDENT FIGURES 2023



Middle East

18

drone/missile attacks on merchant ships in 2023 (0 incidents in 2022)

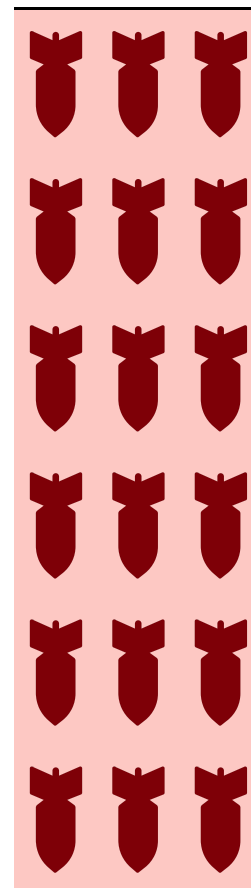
2022 – 2023

There has been a **significant escalation of drone attacks** in the Red Sea following the Houthi decision to target vessel linked to Israel. Moreover, there have been two attacks in the Arabian Sea as well as an incident in the Gulf of Aden.

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2022

18



2023

INSIGHT

In 2022, the overall security situation in this area had improved, particularly after the cessation of Iranian attacks against Israel-linked vessels in the Gulf of Oman/Arabian Sea area. The CAMPO SQUARE attack in February 2023 was therefore a relatively isolated incident.

This changed dramatically with the escalation of the conflict in Israel/Gaza in October 2023. In support of Palestinians, the Houthi government in northern Yemen initiated a series of attacks against Israel with missiles and drones, targeting the southern port city of Eilat, although with limited effectiveness.

This was followed by the boarding and seizure of the vehicle carrier GALAXY LEADER, followed by drone/missile attacks against several merchant vessels linked to Israel in the Red Sea. This particular threat is likely to continue to impact merchant ship operations across the region while the conflict in Israel/Gaza continues, despite the significant presence of naval vessels in the Red Sea.



📍 Middle East

00

houthi strikes on ports/oil facilities (6 incidents in 2022)

There has been a sharp shift in Houthi tactics in 2023, moving away from drone/missile strikes on port and oil facilities in Saudi Arabia and the UAE.

INSIGHT

Prior to 2023, attacks by the Houthis on facilities in Saudi Arabia and the UAE was the primary means to increase the cost of the conflict for both countries. By conducting such attacks, the Houthis wanted to push them towards concessions and a negotiated settlement. The fact that ports and oil facilities were targeted meant that there were very real threats of collateral damage for merchant vessels.

While there has been no permanent peace in the civil war in Yemen, all parties are inching towards an agreement. As the Houthis have no intention of sabotaging the peace talks which could bring them significant progress in their quest for statehood, they have stepped away from carrying out these types of attacks.

This de-escalation in 2023 led to improvements in maritime security in the Red Sea and Gulf of Aden. These improvements have now been eclipsed by the new Houthi threat in these areas, highlighting how larger regional security and political dynamics can affect local maritime security threats for merchant ships in transit.



📍 Middle East

02

vessel detentions in 2023 (2 incidents in 2022)

Iran has continued its policy of potentially seizing and detaining vessels related to commercial disputes over its oil trading under US and EU sanctions.

INSIGHT

The 2023 seizures – the **ADVANTAGE SWEET** in April and the **NIOVI** in May – are examples of different aspects of Iranian seizure policy. Both are related to US sanctions and initiatives by the US to penalise companies trading Iranian oil and to seize specific cargoes as ‘proceeds of terrorism’. Both vessels are still being held off Bandar Abbas, Iran’s main naval base for the Gulf of Oman/ Strait of Hormuz area.

The **NIOVI** situation is very likely related to a previous commercial dispute as part of a shipment of Iranian oil to China. The owners took the case to the High Court in London in 2021. It seems likely that Iran is still looking for restitution over this situation, or to settle old scores.

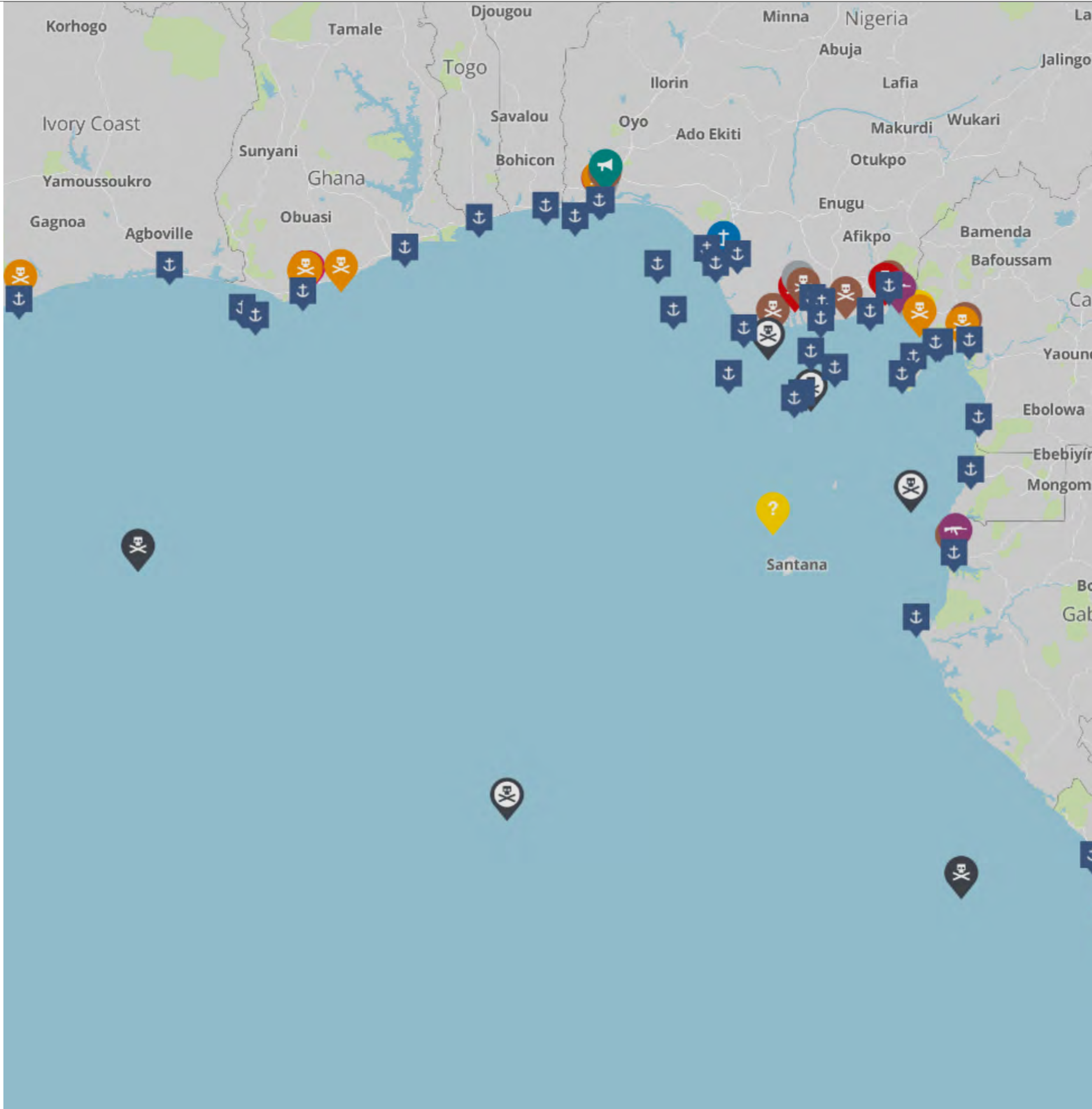
The seizure of the **ADVANTAGE SWEET** is linked to the US seizure of the **SUEZ RAJAN**, a case which has gained domestic political interest in the US over a related court case in the US. The seizure of the **ADVANTAGE SWEET** and its cargo is likely to be a retaliation by Iran.

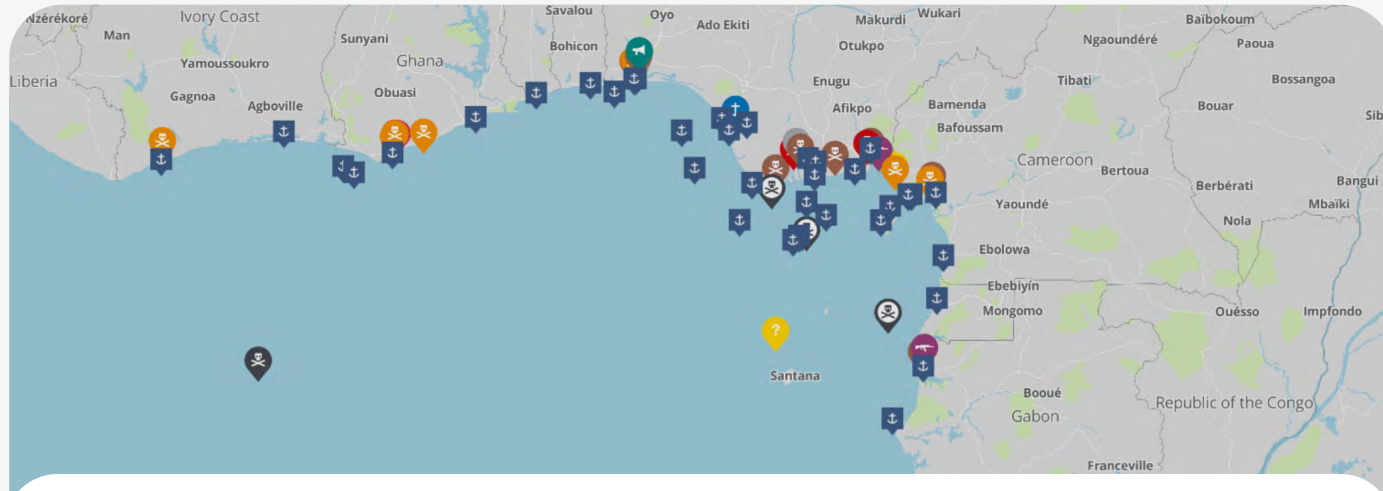
It is likely that the approach by Iranian naval forces of – and live firing on – the US-managed and operated **RICHMOND VOYAGER** on 5 July was another attempt by Iran to affect the ongoing situation and improve its bargaining position. Such incidents are expected to continue while these disputes are ongoing.



- Kidnap-for-ransom
- Kidnap-for-ransom
- Activism

Gulf of Guinea





Gulf of Guinea

02

kidnap-for-ransom attacks against merchant ships in 2023

Kidnappings of seafarers have fortunately become rare since early 2021. However, the conditions for another surge in attacks remain in place and should be closely monitored.

INSIGHT

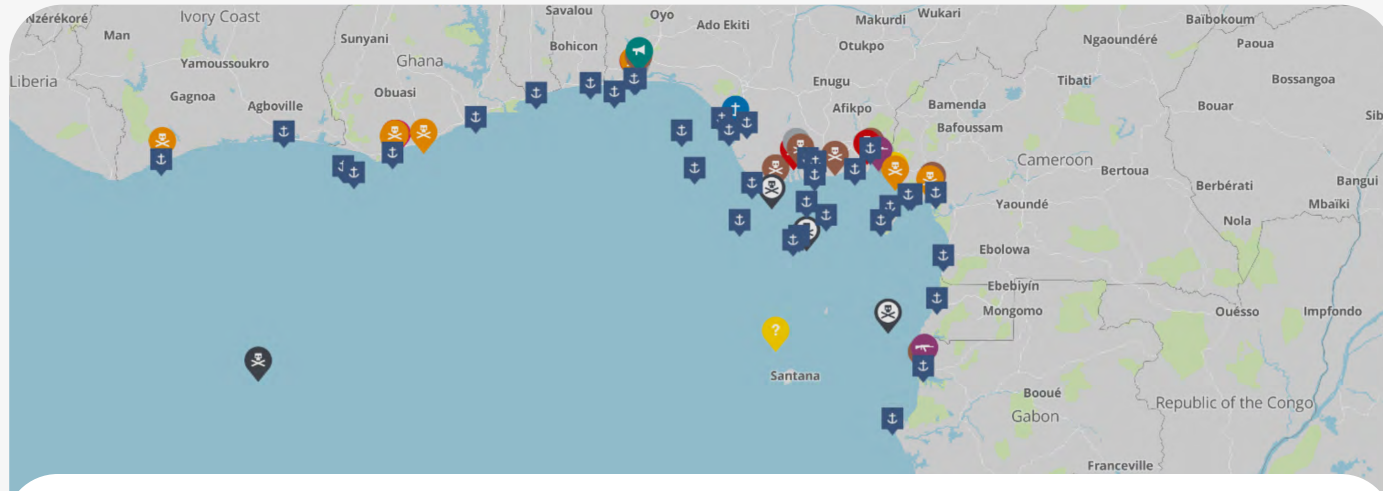
The overall number of attacks that involved the kidnapping of seafarers from merchant ships in the Gulf of Guinea remained at just two incidents in 2023.

Considering the amount of other security challenges at sea, however, these figures should not be attributed to a sustainable improvement of maritime security.

While there is very little concrete data, anecdotal evidence suggests that illicit activities at sea have even increased in the region in recent years. These are often closely related, e.g. illegal fishing and unauthorised STS operations or smuggling of different types of goods on maritime routes.

Piracy, including high-profile attacks against merchant ships, has always been merely one symptom of a general lack of security at sea in the Gulf of Guinea. Moreover, the situation is heavily influenced by land-based factors in Nigeria where the security landscape remains extremely fragile throughout the country in general and in the Niger Delta in particular. Maritime operators should therefore continue to implement mitigation measures such as those outlined in BMP West Africa. Crew vigilance and regular security drills should also be emphasised.

Naval responses to incidents are likely be much quicker relatively close to the coastline as coastal countries have to cope with limited naval capabilities, allowing mainly for operations close to ports and naval bases.



Gulf of Guinea

03

hijackings in the Gulf of Guinea in 2023

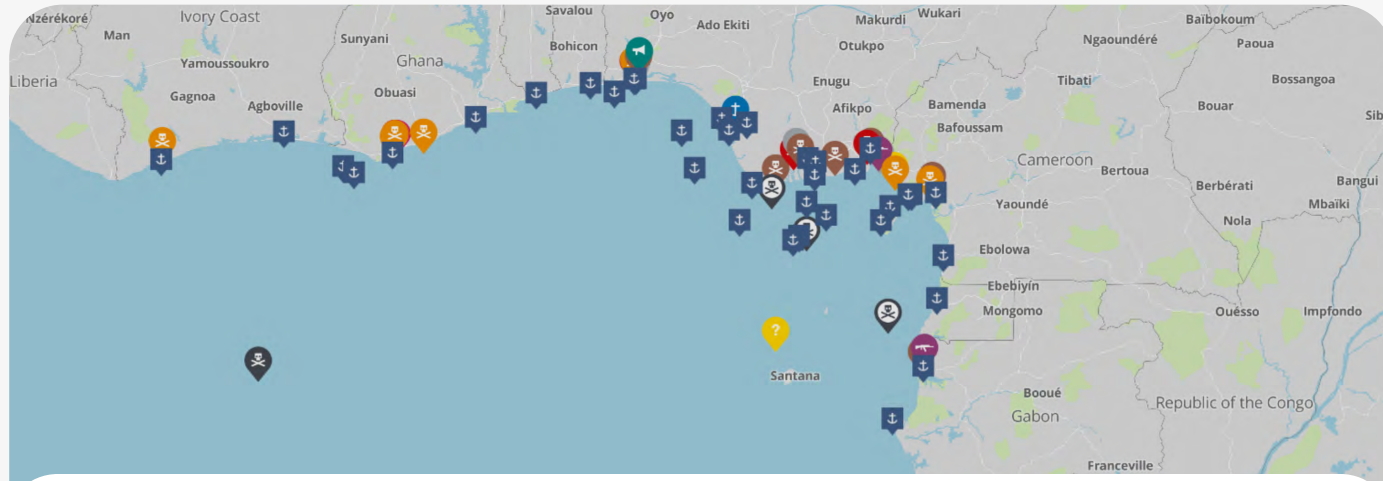
While the number of incidents remains low, **concerns remain** due to widespread illicit activities across the region as well as limited naval and law enforcement capacities at sea.

INSIGHT

Three vessels were reported as hijacked in 2023, one of these incidents reportedly included the transfer of refined oil products from the hijacked tanker to another vessel at sea. Some observers have noted these incidents with concern, noting that such attacks could become more frequent again due to comparatively high oil prices and economic pressure on domestic populations across the region.

The number of hijackings was indeed a much more significant concern in the past. Attributing this decrease to falling oil prices, however, fails to take other factors into account. Domestic prices for refined products throughout West Africa are usually subsidised and therefore not subject to shifts in the price for crude oil. Meanwhile, naval capacities in the region have made extended-duration hijackings and the sale of stolen oil products more complicated.

In recent years, reported hijackings have therefore been limited to vessels operating exclusively in the region. While these incidents have often been linked to other illicit activities, investigations by domestic law enforcement agencies have rarely led to conclusive results due to very limited monitoring and surveillance capacities at sea.



 **Gulf of Guinea**

04

coup attempts and coups in coastal countries in 2023

A successful coup in Gabon as well as attempted coups in Sierra Leone, Guinea and Guinea Bissau have **underlined the fragility of many governments** with potential impacts on maritime operations.

INSIGHT

Since 2020, there has been a relatively high number of coups and coup attempts throughout countries in West and Central Africa. Starting in landlocked countries in the Sahel, the wave of coups has also affected coastal countries around the Gulf of Guinea.

In 2023, Gabon's president was ousted by the military while coup attempts in Sierra Leone, Guinea and Guinea Bissau were also reported. These incidents have highlighted weak democratic processes which have resulted in high levels of inequality, corruption and often fragile ethnic relations. By and large, coups or coup attempts are not a significant concern for vessel operators. However, it is important to consider contingency measures as ships may be forced to stay in port for several days when borders are closed in the aftermath. For companies with commercial operations in a particular country, it is also vital to assess whether these may be impacted by changes in government and the resulting political measures.

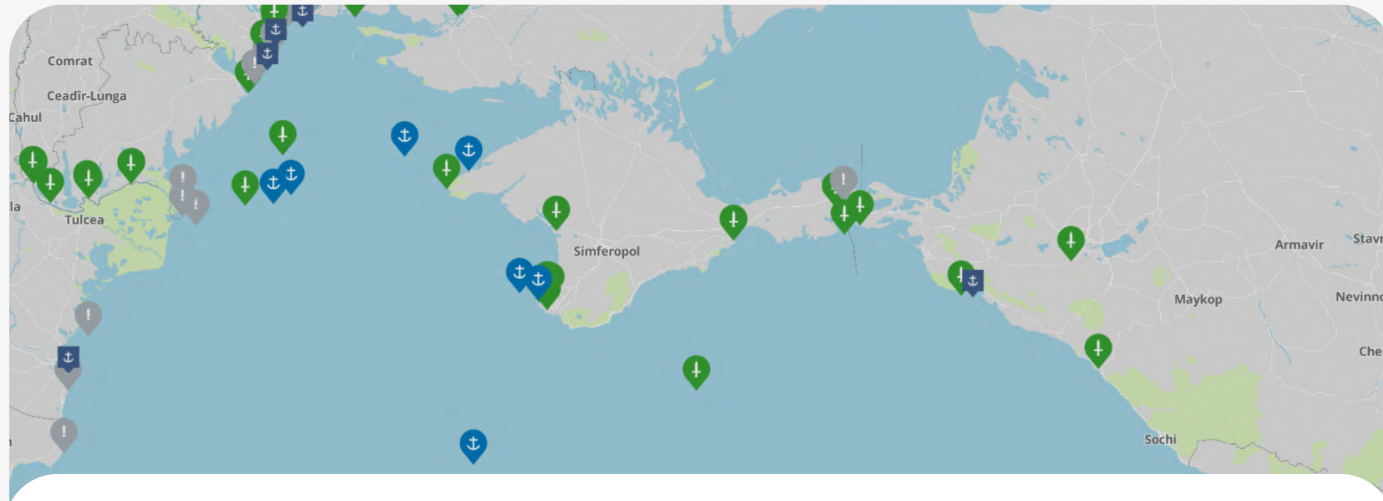


Maritime risk

Attacks against ports

Black Sea





Black Sea

16

mine incidents in 2023
(11 in 2022)

During the second year of the war in Ukraine, the threat of naval mines in the Black Sea has further increased, underlined by an incident involving a bulk carrier in late December

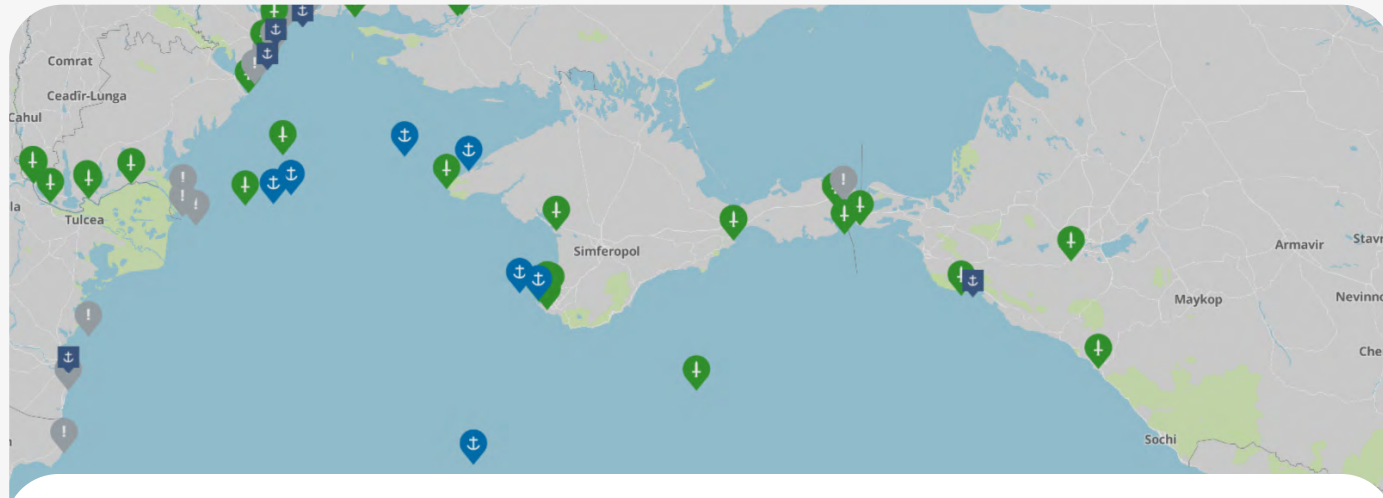
INSIGHT

Naval mines have developed into an increasing concern for merchant ships in the Black Sea, particularly due to problems with drifting mines which have been found along the western part of the Black Sea throughout 2023. In addition, the increased traffic towards ports in Ukraine in the final months of the year has meant that this threat is a vital concern for crews on vessels calling at Ukrainian ports.

In addition to the problem with sea mines which have been used both by the Ukrainian and the Russian military in the course of the war, there have been concerns about Russian attempts to deter merchant ships from calling at Ukrainian ports.

In October, the UK's Foreign Office issued a statement citing its own intelligence sources: "Russia almost certainly wants to avoid openly sinking civilian ships, instead falsely laying blame on Ukraine for any attacks against civilian vessels in the Black Sea. By releasing our assessment of this intelligence, the UK seeks to expose Russia's tactics to deter any such incident from occurring.

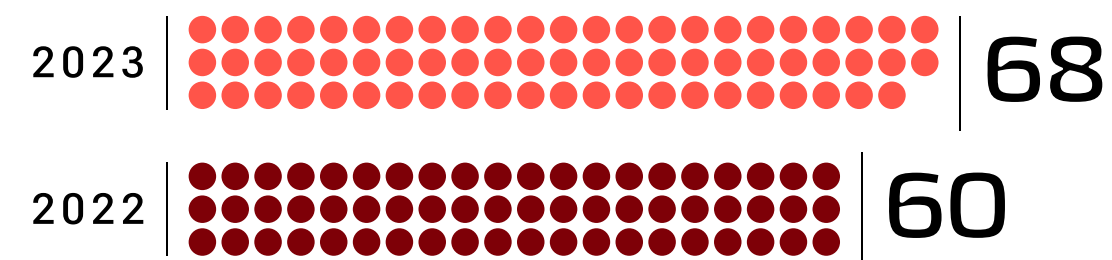
While it is certainly possible for the Russian military to deploy sea mines in such a way, the incidents in 2023 were linked to the vast number of mines that are already placed throughout the northern part of the Black Sea. It is likely that there will be another increase in incidents in 2024, although the actual impact on merchant shipping will also depend on the level of maritime traffic in affected areas. It is also worth noting that sea mines are very likely to remain a concern for merchant ships even after an eventual end of the war as local weather conditions have very likely dispersed at least some deployed mines from their moorings, prolonging any future clearing operations.



Black Sea

68

attacks in 2023



The constantly high level of attacks against port facilities in Ukraine highlights the threat of merchant vessels suffering from collateral damage.

INSIGHT

An increasing number of attacks against Ukrainian port facilities was carried out by Russian forces, especially following the Russian withdrawal from the UN-backed Black Sea Grain Initiative in July. At the same time, there have been a number of attacks against Russian port facilities – including in Russian-occupied Crimea – by Ukrainian forces. Attacks targeting the Ukrainian Danube ports had not occurred in 2022, but this changed in 2023 after these ports were increasingly used to export grain and other cargoes from Ukraine.

One major difference between 2022 and 2023 was the effectiveness of Ukrainian naval drones, which did not exist to the same degree in 2022. Given this increase in capabilities of the Ukrainian forces, the figures for 2023 are likely to carry on into 2024 – although any developments along the frontlines on land will also influence the number of incidents in the Black Sea.

Overall, there are no indications that civilian ships have been targeted directly by Russian forces in 2023. However, a ship was struck by an anti-radar missile in November during the approach to a port, killing the pilot and injuring several crew members. This incident illustrates the threat of collateral damage for merchant ships as attacks against port facilities – or military facilities in the vicinity – may not always be accurate.

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