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THREE SEAS IN CRISIS

Maritime Security Threats in the Black Sea, Red Sea, and Baltic



BLACK SEA



RED SEA



BALTIC SEA



THREE FRONTS, ONE COORDINATED ASSAULT ON GLOBAL TRADE

The Simultaneous Crisis in Three Seas Is Unprecedented in Modern Maritime History



- **Black Sea:** Ukraine vs. Russia's shadow fleet — naval drone warfare spreading to the Mediterranean
- **Red Sea:** Iran-backed Houthis targeting over 100 merchant ships since October 2023
- **Baltic Sea:** Russia's shadow fleet carrying Wagner Group veterans and GRU agents through European waters
- These crises are connected parts of a coordinated challenge by authoritarian states to the Western-led maritime order.

The Black Sea: Ukraine's Expanding Drone Campaign

Ukrainian Naval Drones Are Now Striking Russian-Linked Tankers 2,000 km From Home

- **SBU** uses Sea Baby USVs against Russia's shadow fleet.
- **Nov 2025:** Drones struck tankers Kairos and Virat off Turkey.
- **Dec 2025:** Russian tanker Midvolga-2 struck ~80 miles off Turkey.
- **Dec 2025:** SBU struck Oman-flagged Qendil in the Mediterranean — 2,000+ km from Ukraine.
- **SBU:** "Ukraine will not stop and will strike it anywhere in the world."



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THE BLACK SEA: RUSSIA STRIKES BACK AT UKRAINE'S PORTS

Russia Targets Odesa — Both Sides Are Escalating Beyond Military Targets

- **Dec 2025:** Russian UAVs hit a Turkish-owned ro-ro ship in Odesa harbor.
- Three more ships with Slovak, Palauan, and Liberian flags damaged in strikes.
- **March 2026:** Greek-flagged tanker Maran Homer struck near Novorossiysk.
- Experts predict attacks will intensify in 2026, targeting the 1,000-vessel dark fleet.



THE RED SEA: HOUTHIS PUT A \$1 TRILLION TRADE ROUTE UNDER SIEGE

A Non-State Group Backed by Iran Caused a 90% Drop in Red Sea Container Shipping

- 100+ merchant ships targeted; 2 sunk; 1 seized; 4 sailors killed.
- Container shipping through the Red Sea dropped 90% between Dec 2023 and Feb 2024.
- Major shipping companies rerouted around Africa's Cape of Good Hope, adding ~\$1 million in fuel costs per trip.
- The \$1 trillion trade route was effectively put under siege by a non-state actor.
- Operation Rough Rider led to a ceasefire in May 2025.



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THE RED SEA: THE CEASEFIRE WAS AN ILLUSION

The Houthis Resumed Attacks Within Months — and Iran's War Threatens to Reignite Everything

- **Oct 2025:** Houthis attacked Dutch cargo ship Minervagracht in the Gulf of Aden.
- **Feb 2026:** Industry groups warned of resumed attacks amid U.S.-Iran conflict.
- BIMCO confirmed threats to resume attacks in the Red Sea and Gulf of Aden.
- **Tools** for renewed attacks (Iranian weapons, Russian satellite data) remain in place.

“Could soon be confronting a more dangerous, better-armed terrorist group.” — Ari Heinstein



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THE BALTIC SEA: RUSSIA'S SHADOW FLEET IS AN ARMED SPY NETWORK

Wagner Veterans and GRU Agents Are Sailing Through European Waters on Commercial Tankers

- Nearly half of crude leaving Russia's Baltic ports carried by sanctioned shadow fleet ships.
- Sanctioned Russian tankers regularly carried two-man 'vessel protection teams'.
- Teams made up of Wagner Group veterans and GRU military intelligence agents.
- Designed to prevent European authorities from boarding or inspecting ships.
- NATO and Nordic-Baltic governments describe it as a blurring of commercial and military shipping.



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THE BALTIC SEA: EUROPE FIGHTS BACK

14 European Nations Issued a Joint Warning — and the U.S. Seized a Russian Tanker

- **Jan 2026:** 14 European nations warned that ships without proper flags will be treated as stateless under UNCLOS Article 110.
- The U.S. seized Russian-flagged tanker *Marinera* in the North Atlantic, “flipping the initiative.”
- Russian ships documented launching drones and cutting Baltic Sea cables.
- Europe’s crackdown triggers Russian retaliation against undersea infrastructure.



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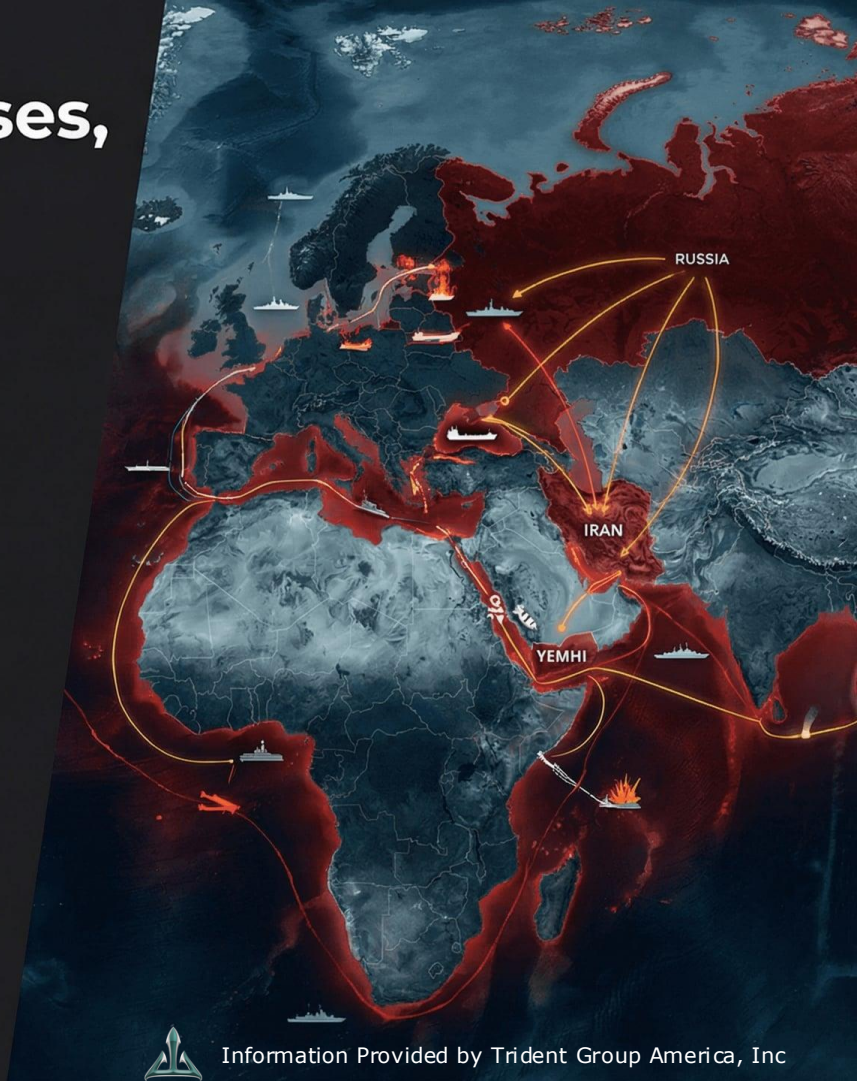


The Convergence: Three Crises, One Coordinated Strategy

Russia, Iran, and Their Allies Are Deliberately Targeting the Western Maritime Order Together

- Russia's shadow fleet funds the Black Sea campaign AND conducts hybrid warfare in the Baltic
- Iran supports the Houthis in the Red Sea; Russia provides satellite targeting data to Houthi forces
- Moscow disrupts European maritime infrastructure — cables, pipelines, offshore facilities — while its tankers sail through European waters

"It's clear that shipping in 2026 is going to get darker. The number of vessels operating outside the international rules-based order grows daily." — Michelle Wiese Bockmann



THE END OF NEUTRAL COMMERCIAL SHIPPING

The 200-Year Separation Between Combat and Commercial Shipping Is Being Systematically Destroyed

- **Neutral-flagged** ships can be hit by **naval drones** far from any official conflict zone.
- **Port facilities** can be **destroyed** by sudden missile strikes with no warning.
- **Shadow fleet tankers** with intelligence agents and armed mercenaries pass openly through the English Channel.
- Any ship sharing routes, ports, or registries with shadow fleet tankers faces misidentification, crossfire, or deliberate targeting.





THE WEST IS RESPONDING — BUT NOT FAST ENOUGH

Tactical Responses to Individual Events Will Not
Defeat a Coordinated Multi-Theater Strategy

- Operation Rough Rider in Yemen: effective but temporary.
- Baltic Sentry: meaningful but only a partial deterrent.
- Shadow fleet seizures: enforcement remains inconsistent.
- EU Action Plan on Cable Security: operational capability lagging.
- Core problem: Adversaries coordinate across theaters; Western responses remain siloed.
- Needed: A coordinated maritime strategy integrating sanctions, deterrence, legal reform, and intelligence.

**FRAGMENTED
WESTERN RESPONSES**



**ISOLATED
ACTIONS**

**COORDINATED
ADVERSARY STRATEGY**



**MULTI-THEATER
NETWORK**

THE IMPERATIVE OF A UNIFIED MARITIME STRATEGY



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If Each Crisis Is Handled Separately While Adversaries Work Together, Escalation Is Inevitable

The Black Sea, Red Sea, and Baltic Sea are three fronts in a single campaign.

Weaknesses exposed demand urgent, coordinated action:

Sanctions enforcement closing shadow fleet loopholes.

Naval deterrence operating simultaneously across all three theaters.

Legal reform giving coastal states real authority.

Intelligence sharing connecting the dots worldwide.

"The West needs more than just tactical responses to single events. It requires a coordinated maritime strategy."