

THE RED SEA REAWAKENING

Proxy Maritime Warfare and Commercial Shipping Security



A STRATEGIC FLASHPOINT

Escalating proxy conflicts in and around the Red Sea have transformed this vital corridor into a high-risk maritime environment.



CRITICAL FOR GLOBAL TRADE

~12% of global trade and ~30% of container traffic pass through the Red Sea-Bab el-Mandeb corridor.



SECURITY IN A NEW ERA

Traditional maritime security must evolve to counter asymmetric threats, protect commercial shipping, and ensure freedom of navigation.



SAFE SEAS. SECURE TRADE. STABLE FUTURE.

Strengthening resilience in one of the world's most important waterways.



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ASIA

INCREASING THREAT LANDSCAPE

- MISSILE & DRONE THREATS
- MARITIME MILITIAS
- STATE PROXY ACTORS
- GPS JAMMING & CYBER RISKS

KEY CORRIDOR. GLOBAL IMPACT.

- ~12%**
OF GLOBAL TRADE
- ~30%**
OF CONTAINER TRAFFIC
- HIGH-RISK**
MARITIME ENVIRONMENT

PROXY MARITIME WARFARE

A Doctrinal Shift in Commercial Shipping Security



1. MAGIC SEAS & ETERNITY C (JULY 2025):

Bulk carriers attacked and sunk by Houthi forces using coordinated missile, USV, and fast attack craft strikes.



2. NOT PIRACY, BUT WARFARE:

Attacks executed with military-grade precision by a non-state actor under regional power direction, not for financial gain.



3. DOCTRINAL SHIFT:

Most important shift in maritime security since Somali piracy crisis, but without an adequate security framework.



4. HOUTHİ CAMPAIGN (OCT 2023):

Began with missiles toward Israel, systematically disrupting global commerce for strategic coercion, not state warfare.



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THE HOUTHI CAMPAIGN

Five Phases of Escalating Targeting Criteria



PHASE 1 (NOV 2023):

Israel-linked vessels targeted following Gaza war outbreak, marking the start of the maritime campaign.



PHASE 2 (DEC 2023):

Targeting criteria expanded to include all ships heading to Israeli ports, regardless of ownership.



PHASE 3 (JAN 2024):

Vessels linked to the United States and United Kingdom added to the target list following military strikes.



PHASE 4 (MAY 2024):

Ships whose operators had vessels visiting Israeli ports became targets, significantly broadening risk exposure.



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BMP FAILED AS A SECURITY DOCTRINE

Inadequate for Military-Grade Proxy Warfare



1. BMP FRAMEWORK: Designed for Somali piracy (small boats, automatic weapons, cargo/crew hostage), not military-grade threats.



2. HOUTHİ CAPABILITIES: Asef anti-ship ballistic missiles (400km range), Mandab-2 anti-ship cruise missiles (120km range, 165kg warhead), one-way attack drones, explosive USVs.



3. DOCTRINAL COLLAPSE: BMP assumes human threat in small boats; Houthi campaign invalidated this, exposing a critical gap.



4. INCREASED SEVERITY: Frequency of incidents decreased, but severity increased, making risk assessment more complex.



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THE ECONOMIC ARCHITECTURE OF DISRUPTION

Global Trade Routes Restructured, Costs Soar



1. SUEZ CANAL TRANSIT DROP:

Container ship transits fell 90% from pre-crisis baseline at peak disruption, effectively closing the corridor.



2. REROUTING & DELAYS:

Major container lines rerouted around Cape of Good Hope, adding 10-14 days to voyages and increasing fuel/operational costs.



3. FREIGHT RATE SPIKES:

Asia-Europe lanes spiked 200-400% at peak, stabilizing at 25-35% above pre-crisis levels.

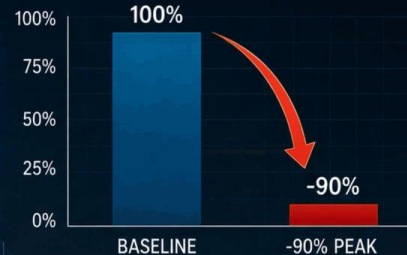


4. INFLATION DRIVER:

Suez Canal (12% global trade, 30% container volume) closure became a systematic inflation driver for dependent economies.



SUEZ CANAL TRANSIT DROP



FREIGHT RATE SPIKES



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INSURANCE MARKET RESTRUCTURING

Elevated Risk Pricing Becomes
a Permanent Feature



1. WAR RISK PREMIUM SURGE:

Additional war risk premium for Red Sea transit surged to at least 0.7% of hull value after July 2025 sinkings.



2. COST JUMP:

Insurance costs for a \$100M vessel jumped from \$300,000 to \$1 million per voyage in the immediate aftermath of attacks.



3. CEASEFIRE DIP:

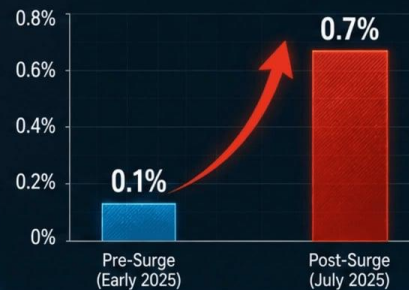
Premiums fell to 0.2% after October 2025 ceasefire, but elevated risk pricing is expected to remain a structural feature.



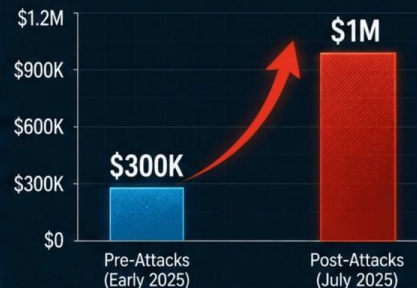
4. TARGETING LOGIC:

Ships with US, UK, or Israel business connections may face extreme difficulty securing insurance if attacks resume.

War Risk Premium Surge



Insurance Cost Jump



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THE STRUCTURED PAUSE

Conditional Suspension and Unreliable Ceasefire



- 1. CONDITIONAL SUSPENSION (NOV 2025):**
Houthis announced suspension of attacks, explicitly conditioned on Gaza ceasefire developments.



- 2. RENEWED THREATS (FEB 2026):**
U.S.-Israeli strikes on Iran led to immediate Houthi threats to resume maritime targeting across the region.



- 3. CMA CGM REVERSION:**
Three Asia-Europe services rerouted back to Cape of Good Hope due to "complex and uncertain international context."



- 4. STRATEGIC UNRELIABILITY:**
Nothing suggests Houthis can be deterred; significant degradation of capabilities needed for shipping companies to return.



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WHAT GENUINE SECURITY POSTURE NOW REQUIRES

Beyond BMP: Intelligence-Led Risk Assessment



1. NEW SECURITY POSTURE:

Required for corridors where state-backed non-state actors deploy military-grade interdiction capability.



2. EXPOSURE BEYOND FLAG STATE:

Risk extends to ownership, chartering, trading, and corporate affiliation profiles (US, UK, Israeli associations).



3. INTELLIGENCE FUNCTION:

Continuous monitoring of threat actor's published targeting criteria and real-time analysis for specific vessels.



4. CAPABILITY GAP:

No commercial security measure can close the gap against anti-ship ballistic missiles, cruise missiles, long-range drones, and swarm attacks.

VESSEL THREAT ASSESSMENT



OVERALL RISK SCORE

VERY HIGH



THREAT LEVEL
CRITICAL

THREAT INDICATORS

- Anti-Ship Missiles Detected in Region
- Long-Range Drones Active
- Swarm Activity Likely
- GPS Spoofing Detected
- Electronic Warfare Environment

VESSEL NAME
ATLANTIC MERCURY

IMO
9876543

TYPE
CONTAINER SHIP

FLAG
LIBERIA

DESTINATION
JEDDAH, SAUDI ARABIA

ETA
12 MAY 2025 18:30 UTC

THREAT ZONE: RED SEA CORRIDOR



TARGETING ACTIVITY (LAST 7 DAYS)



GLOBAL SHIPPING TRAFFIC



OWNERSHIP & AFFILIATION RISK

CATEGORY	RISK LEVEL	STATUS
Ownership	HIGH	●
Chartering	HIGH	●
Trading	ELEVATED	●
Corporate Affiliation	HIGH	●
Flag State	MEDIUM	●
Owner	ELEVATED	●

INTELLIGENCE FEEDS

Feed Type	Timestamp
SIGINT Feed	10:24 UTC
HUMINT Report	10:18 UTC
Open Source Intel	10:12 UTC
Maritime Security Report	10:05 UTC
Partner Agency Update	09:58 UTC

REAL-TIME ALERTS

- 10:24 Missile Activity Detected - Gulf of Aden
- 10:21 Drone Swarm Reported - Bab el-Mandeb
- 10:18 GPS Interference - Red Sea Corridor
- 10:15 Suspicious Vessel Behavior - High Risk Area

SYSTEM STATUS: OPERATIONAL



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CONCLUSION

Adapting to the New Reality of Maritime Proxy Warfare



1. DOCTRINAL SHIFT:

The Red Sea campaign marks a fundamental shift from piracy to proxy maritime warfare, rendering traditional security doctrines like BMP obsolete.



2. ECONOMIC IMPACT:

Restructured global trade routes, soaring freight rates, and permanent elevated insurance premiums reflect deep structural disruption.



3. PERSISTENT THREAT:

Houthi capabilities remain intact; the threat is credible and immediately resumable despite temporary pauses or conditional ceasefires.



4. PROACTIVE INTELLIGENCE:

Genuine security now requires continuous, intelligence-led assessment of vessel profiles against evolving threat actor criteria.

