

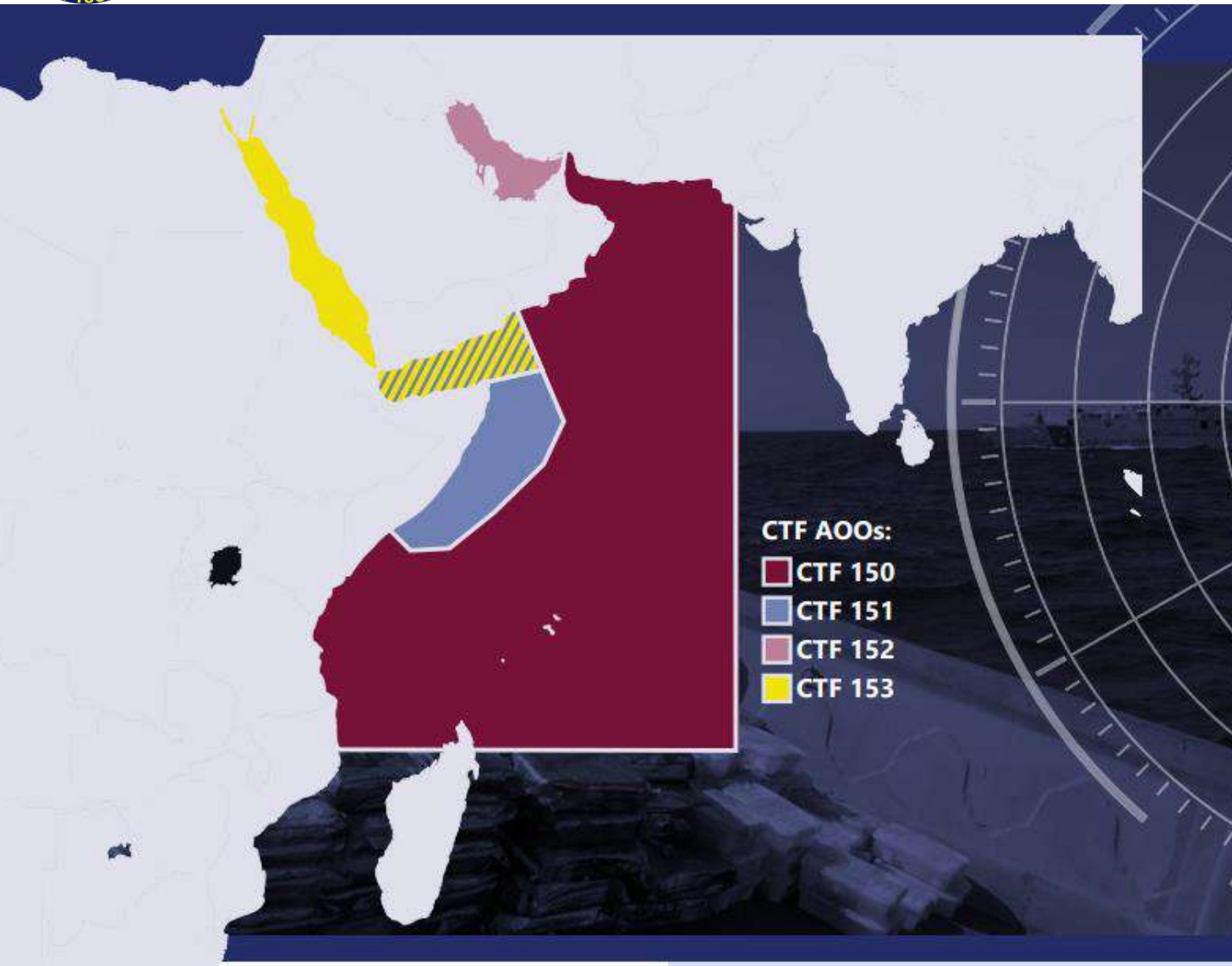
CDR MATTHEW GREENHILL

Mombasa Conference 1-4 Sep 2025

Created with mapchart.net



Situational Awareness- BLUF



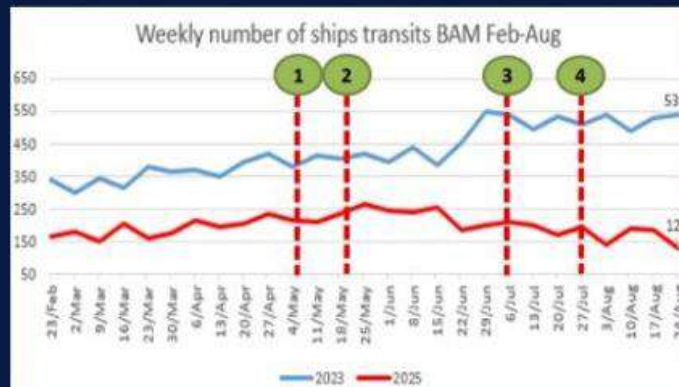
The regional tensions that exist in 2025 are likely to continue in the period out to 2030. It is possible that some developments, such as population growth and increased regional investment, will influence these pre-existing tensions. Through to 2030, serious and organized crime, International Terrorist Organizations (ITOs) and Violent Extremist Organizations (VEOs) will continue to pose a persistent threat to peace and stability throughout the region. Regional power networks will remain important to international collaboration. Regional investments are likely to increase, allowing for faster and more focused economic benefit to countries in the region. However, population growth within and outside the region is increasing significantly. Ongoing food crises will contribute to an increase in population movement. Migration both from and through the AOO is likely to be the most influential feature through to 2030, increasing pressure on regional security patrols and further drawing on resources. ITOs and VEOs will almost certainly benefit from the proliferation of advanced conventional weapons such as drones, and portable, cheap missile systems. Maritime Security organizations will be busier, but with fewer assets to engage with the threats to regional security – alternatives to increase mass and increase understanding will need to be explored.



GoA, BaM, Indian Ocean & CoGH Shipping Trends

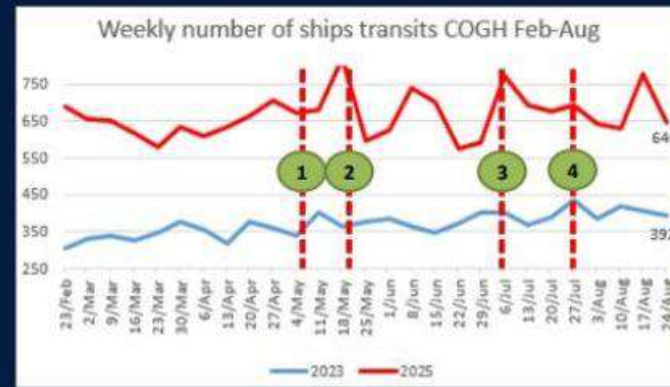
Weekly Transits

Bab al-Mandeb (BAM)



31.4 % Decrease in the last week, lowest since Feb 2025.

Cape of Good Hope (CoGH)



16.9 % Decrease last week and staying consistent with historical norms.

1

US and Houthi Ceasefire
06 MAY 2025

2

Houthi Blockade Announcement
19 MAY 2025

3

Resumption of Attacks
06 JULY 2025

4

Houthi Announcement
27 JULY 2025

*The statistics presented in this report are based solely on cargo carrying vessels engaged in international trade/transit. This data does not include smaller vessels such as pleasure crafts, yachts, fishing vessels, tugboats, or other types of smaller ships that operate within local or regional waters and are not involved in international shipping.

Data Source: S&P Global

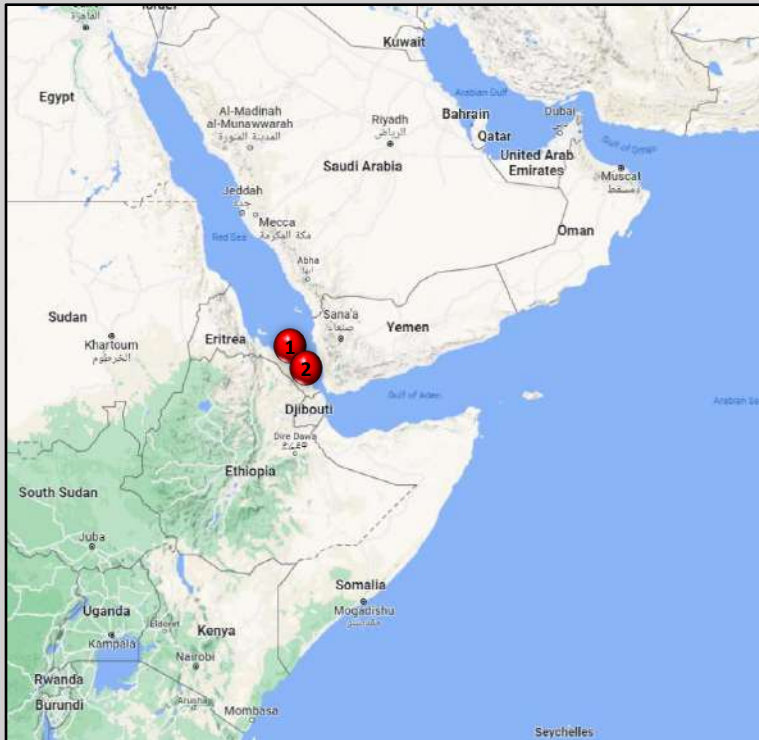
STATISTICS

- 60% decrease in the volume of merchant traffic transiting the BaM since Nov 23.
- 50% decrease in Suez Canal transits since the start of Houthi attacks in Nov 23.
- Since 2023 the Houthis have targeted over 90 MVs and successfully sunk four.
- The top 10 major shipping companies and 'energy majors' are routing via the CoGH.
- Industry has made significant investment in South Africa as a logistics hub.

CMF ASSESSMENT

This trend is highly likely to continue for the near/foreseeable future, predominantly due to the Houthi threat. Somali piracy remains a threat but is not the factor that is driving these regional shipping trends.

Houthi Threat Update- Recent Incidents



Houthi Maritime Actions

1

6-7 Jul Sinking of the Magic Seas

2

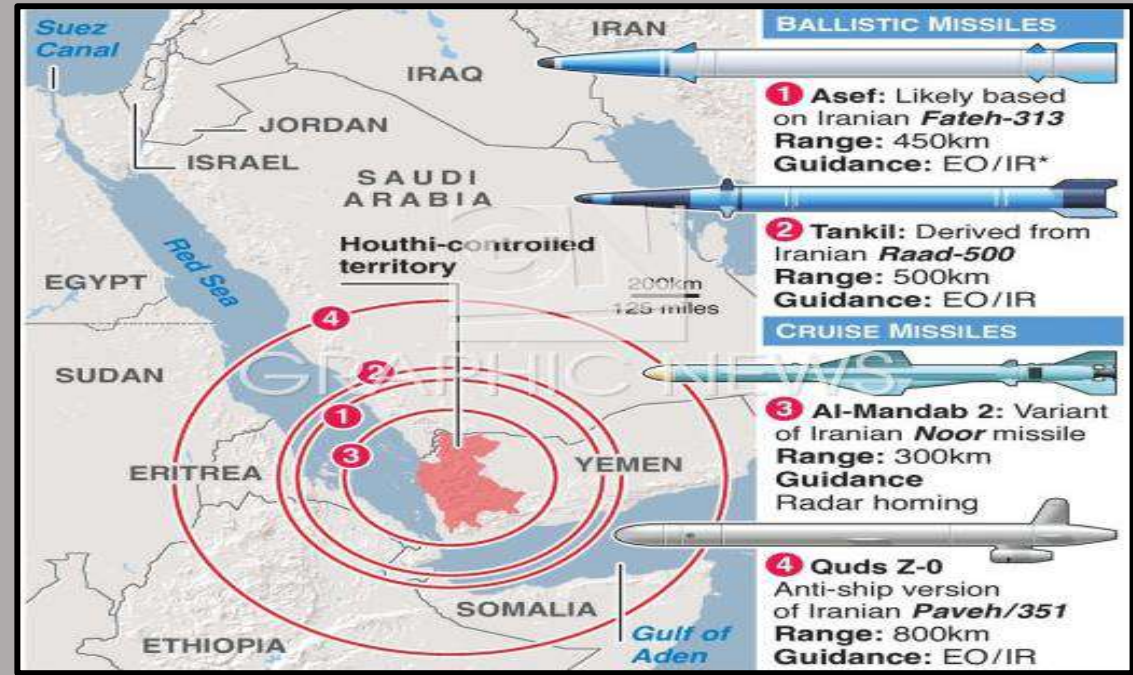
8 Jul Sinking of Eternity C



The Houthis have stated that “military operations continue to target the depths of the Israeli entity in occupied Palestine, as well as preventing Israeli navigation in the Red and Arab Seas and disrupting the port of Eilat, until the aggression against Gaza stops and the siege on it is lifted.” The intent to attack ships that have a direct link to Israel, has developed into a situation where the definition of ‘link’ is so wide, that large numbers of ships have become subject to Houthi targeting.

N2 ASSESSMENT: It is **HIGHLY LIKELY** that the Houthi Forces will continue to threaten global shipping, showing any link to Israel. It is **ALMOST CERTAIN** that their intent to target Israeli linked shipping will continue at least until the conclusion of conflict between Israel and Hamas.

Houthi Threat Update- Trend



It is highly likely that the Humanitarian Operations Coordination Centre (HOCC) will continue to make attempts to legitimise itself through various channels, offering support services to vessels wishing to transit through the RS, BaM, GoA, and AS. Any information posted from the HOCC, or affiliated sites should be consumed with extreme caution due to Houthi affiliations.

Houthi intent to target shipping with links to Israel is assessed to be CRITICAL with the Houthis likely seeking to launch an attack on intended vessels in the coming weeks if the opportunity presents itself. It is assessed that for all shipping the overall threat level from Houthi attack remains SEVERE in the region.



Joint Maritime Information Centre (JMIC)



Joint Maritime Information Center (JMIC) is an entity operating in close cooperation with the Combined Maritime Forces (CMF). The JMIC seeks, where possible, participation from multiple military stakeholders including Naval Cooperation and Guidance for Shipping (NCAGS) and Information Fusion Centers (IFC) specialists to fuse open-source unclassified information into a truthful messaging service for the maritime industry. The main JMIC products are:

UKMTO Initial Alerts

- Notification of incident shared as soon as possible.
- Updated as more information becomes available.
- Specific location and Ships name may not be shared initially.



JMIC Infonotes

- Sent within 24 hours of incident.
- Identify and provide clarity on each incident.
- Ensure ground truth of any incidents reported by any party.
- Immediate military advice to Shipping Industry.



JMIC Weekly Dashboard

- Summary and analysis of recent incidents.
- Overview and Statistical trending of all incidents.
- Threat outlook and relevant information.
- JMIC recommendations to Shipping Industry.



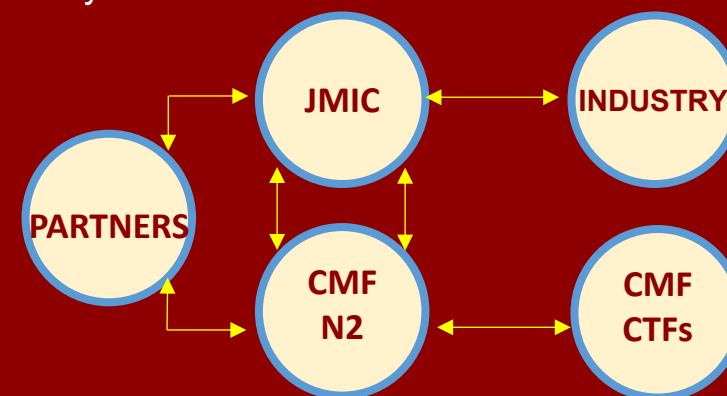
Vessels are advised to report incidents in accordance with BMP to UKMTO in a timely fashion. This will enable information sharing and analysis.

Email: watchkeepers@ukmto.org Website: www.ukmto.org

The JMIC is aligned to the principle that all vessels are entitled to FoN and seafarers supporting the legitimate movement of global trade are unhindered. JMIC endeavours to offer analysis, advice, and non-binding military guidance to help inform against threats to commerce, maritime security and regional instability and Risk Assessments which remain the responsibility of shipping companies, owners and operators.

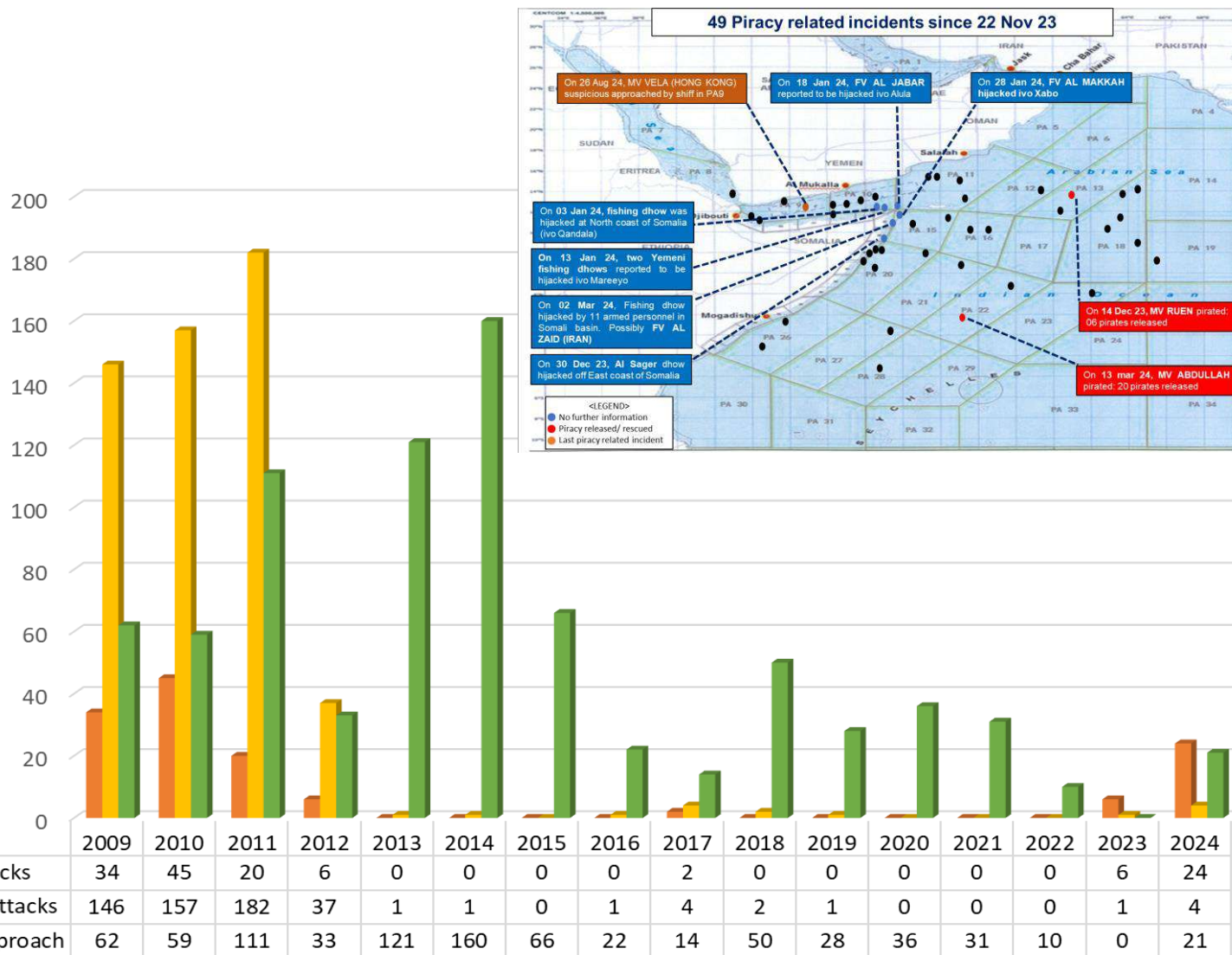
JMIC will:

- Provide accurate and timely incident information to enable commerce, maritime security or regional instability threat and risk assessment by the shipping industry to support operational planning and decision making.
- Provide clear and concise updates and guidance to the shipping industry and be an “authoritative source of information.”
- Provide incident reporting involving commercial maritime industry assets.
- Provide pattern-of-life assessments through strategic choke points within the AOO.
- Identify and designate vessels of interest that may be at risk from non-state actors.





Piracy

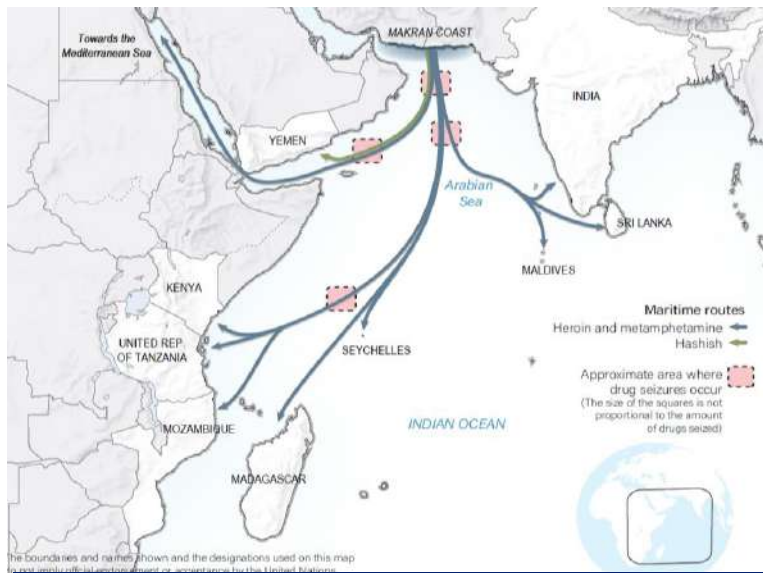


A LATENT THREAT POISED FOR RESURGENCE

- Recent incidents of small-scale robberies indicates **simmering piracy threat**
- There have been no hijackings in 2025 where ransoms were reportedly received.
- IUU fishing** continues to devastate Somali fishing communities
- Potential **resurgence of piracy** looking up to 2030 due to:
 - Ongoing **instability in Somalia**
 - Limited **coastguard capacity**
 - Economic fallout** from IUU fishing
- Piracy **tactics** also evolving
- Al-Shabab collaboration with Houthis and Somali Pirates
- CMF will respond to regional piracy via **CTF 151 icw EUNAVFOR OP ATALANTA**



Smuggling in the GoA and IO



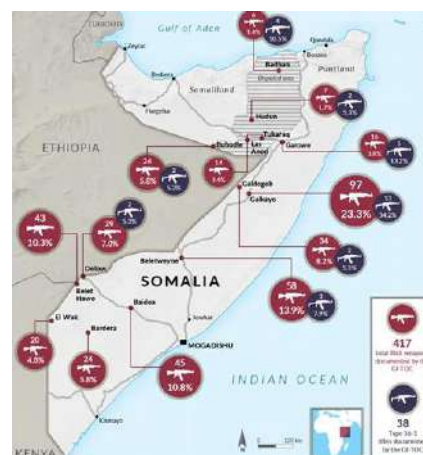
Narcotics smuggling routes



Poppy cultivation map - Afghanistan



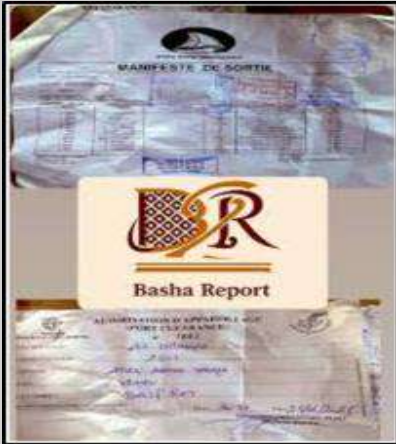
Armed seizures 2015-2021



DRUGS, WEAPONS, AND INSTABILITY

- Smuggling networks pose a **persistent and evolving threat**
 - Drugs and weapons
 - Enablers of broader insecurity
- Smuggling of **Methamphetamine on rise**
- Likely **increase** in drug trafficking volumes
- Demand for **illegal weapons persist** in the region
- Weapons trafficking is becoming more **sophisticated**
- Smugglers **operate across borders**
- Al Shabaab and Houthi **collaboration increasing**.
- CMF will respond to regional piracy via **CTF 150 icw RNIFC**.

Interdictions in the GoA



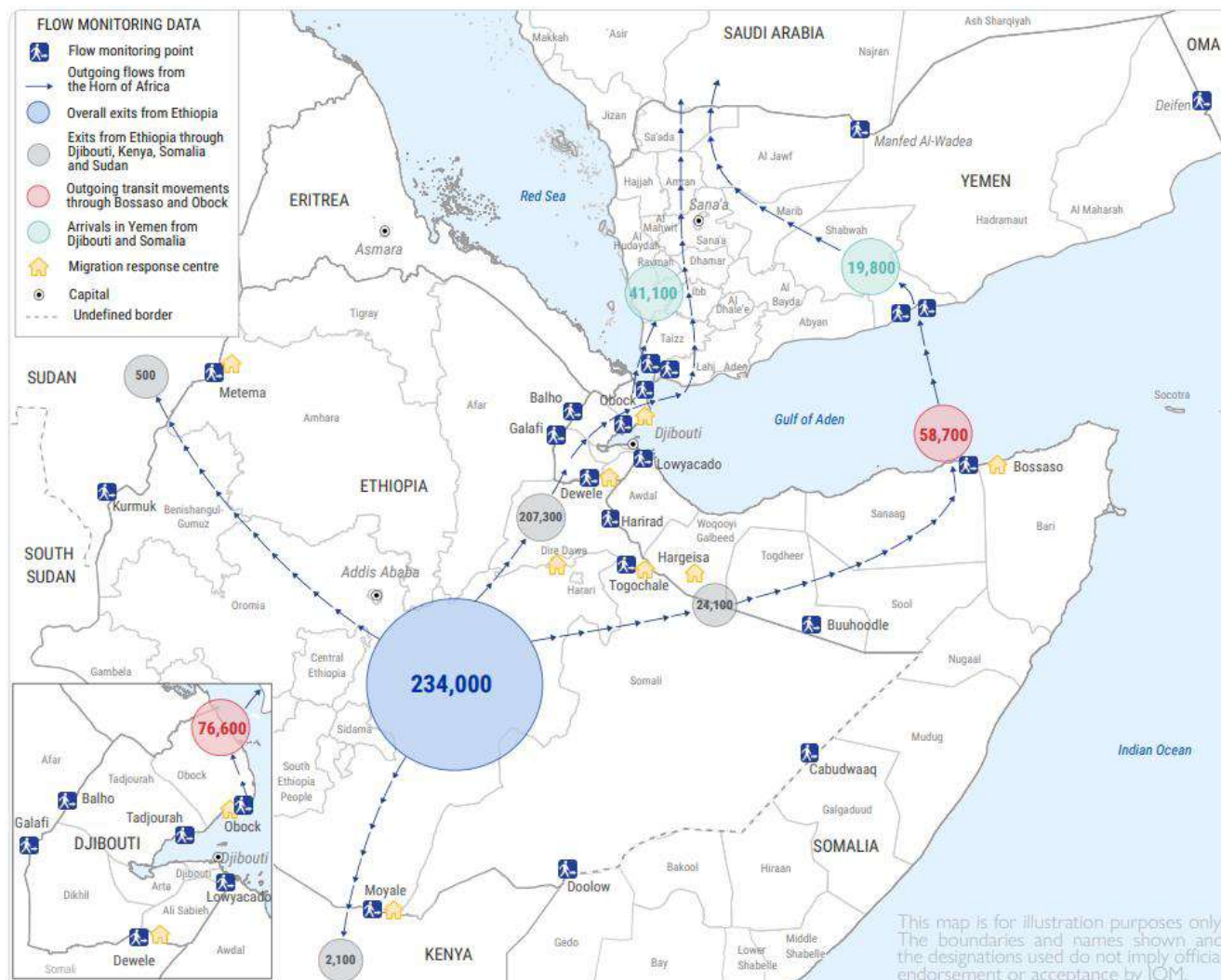
- **16 JUL** US CENTCOM confirm that Yemen's National Resistance Forces (NRF) (anti-Houthi militia led by General Tareq Saleh), seized more than 750 tons of advanced Iranian weaponry intended for the Houthis. The shipment included ASMs, Type 358 SAM parts and BM warheads, drone engines, radar systems, air defence components, and encrypted communications equipment. Manuals in Farsi and other markings indicated the weapons were produced by a company affiliated with Iran's MoD.

CMF ASSESSMENT

The Houthis are likely continuing to acquire modern Advanced Conventional Weapons (ACW) from Iran, as well as through other commercial sources. The Houthis have sophisticated smuggling networks including links to Somalia and Al-Shabaab. High speed skiffs can be impossible to interdict and Coalition Navy MIOPs in the GoA are challenging.



Population Growth & Migration



A RISING TIDE

- An unprecedented **demographic challenge**
- Maritime routes across the Red Sea and Gulf of Aden are **heavily trafficked**
- Smugglers exploit **vulnerable migrants**
- Migration's **impact** on maritime security is twofold:
 - Generates significant **revenue** for criminal networks
 - Increases the **risk of maritime incidents**

Outgoing movements tracked by Flow Monitoring from the Horn of Africa towards the Arabian Peninsular in 2024



CONCLUSION



A COMPLEX AND EVOLVING LANDSCAPE

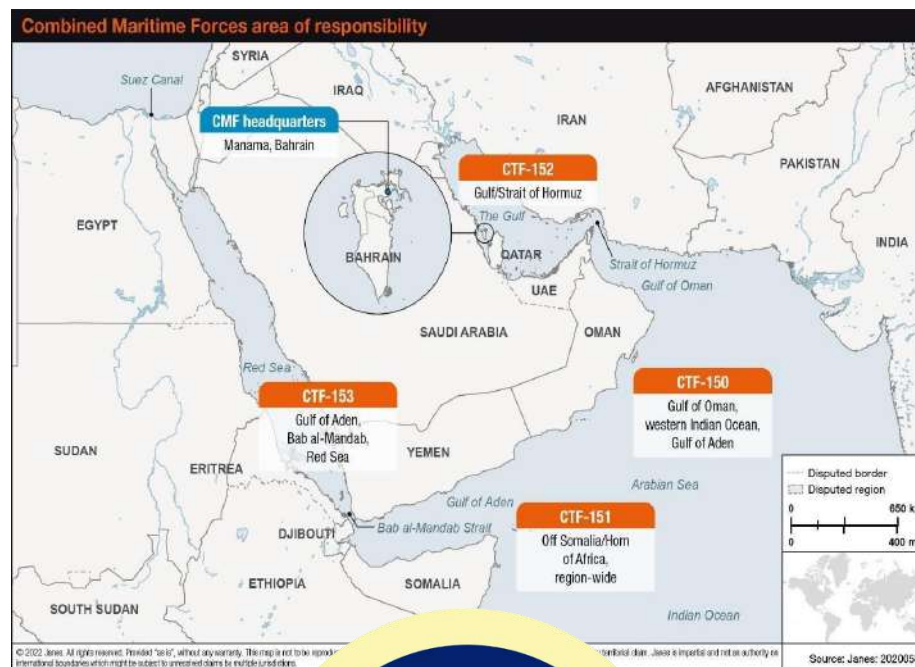
Non-state actors will **continue to target** our choke-points

Piracy looms as a **resurgent risk**

Opportunities for trade meets **vulnerability to chaos**

Smugglers will adapt and **expand their networks**

Migration will **reshape** the region's stability

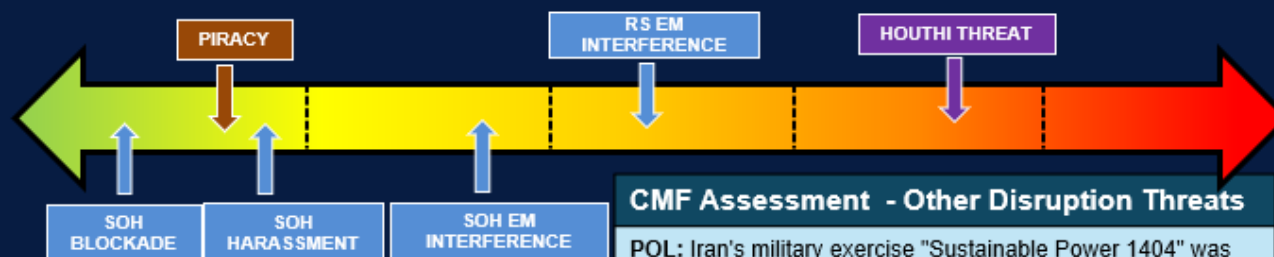




CMF Weekly Regional Threat Level Assessments (available online via JMIC's LinkedIn and UKMTO.org)



CMF Regional Threat Level Assessment



CMF Assessment - Piracy Threat

The threat from piracy is currently assessed as **LOW** in the Somali Basin (SB) due to unfavourable weather conditions from the SW Monsoon which highly likely impacts small boat operations in the SB, GoA and up into the AS. However, in the Southwestern region, and closer inshore, the threat remains at **MODERATE** as the opportunity for attack increases due to the marginal weather conditions experienced along the coastline.

It is likely that when the SW Monsoon winds reduce, the opportunity increases for piracy attacks. It is likely that if Houthi intent to undermine maritime security in the region continues, and their transactional relationship with al-Shabaab develops, the Houthis' will seek to exploit opportunities to increase al-Shabaab sponsored piracy in-line with their intent at the time which will highly likely decrease maritime security in the region.

CMF Assessment - Other Disruption Threats

POL: Iran's military exercise "Sustainable Power 1404" was highly likely a showcase of resilience and readiness after the 12-day war. The exercise took place in the Sea of Oman and Northern IO. The IRIN focused their drills on the launching of cruise missiles from coastal batteries and surface vessels and deployment of ISR and attack drones. NOTAMs were issued prior to the exercise commencing.

Harassment in the SoH is assessed as **LOW** with activity from regional actors likely stabilising within the AG, SoH and GoO, due to maintaining force protection measures. Any activity observed will likely manifest in hailing and routine patrols especially around choke points to assert control in the region.

EM Interference: There are **MODERATE** levels of EMI in the AG and SoH and **SUBSTANTIAL** levels of EMI in the central RS near Port Sudan and the Eritrean coastline. In both areas there has been a reduction in EMI levels observed previously with most EMI presenting as AIS anomalies.

Threat to Blockade SoH: It is currently assessed as **LOW** and highly unlikely that any regional actor will blockade the SoH whilst negotiations concerning Iran's nuclear programme persist.

Threat Level	Definition
Low	An attack is highly unlikely
Moderate	An attack is possible but not likely
Substantial	An attack is a strong possibility
Severe	An attack is highly likely
Critical	An attack is almost certain

CMF Assessment - Houthi Threat

If the situation in Gaza continues to escalate and the humanitarian situation continues to worsen, it is highly likely that Houthi intent to target shipping with links to Israel will increase.

It is highly likely that the Humanitarian Operations Coordination Centre (HOCC) will continue to make attempts to legitimise itself through various channels, offering support services to vessels wishing to transit through the RS, BaM, GoA, and AS. Any information posted from the HOCC, or affiliated sites should be consumed with extreme caution due to Houthi affiliations.

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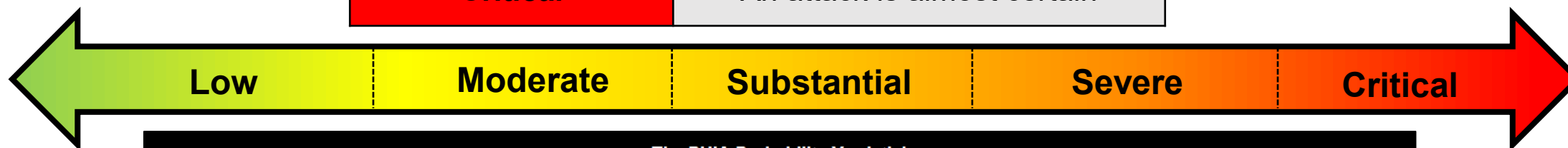
JMIC ADVISORY



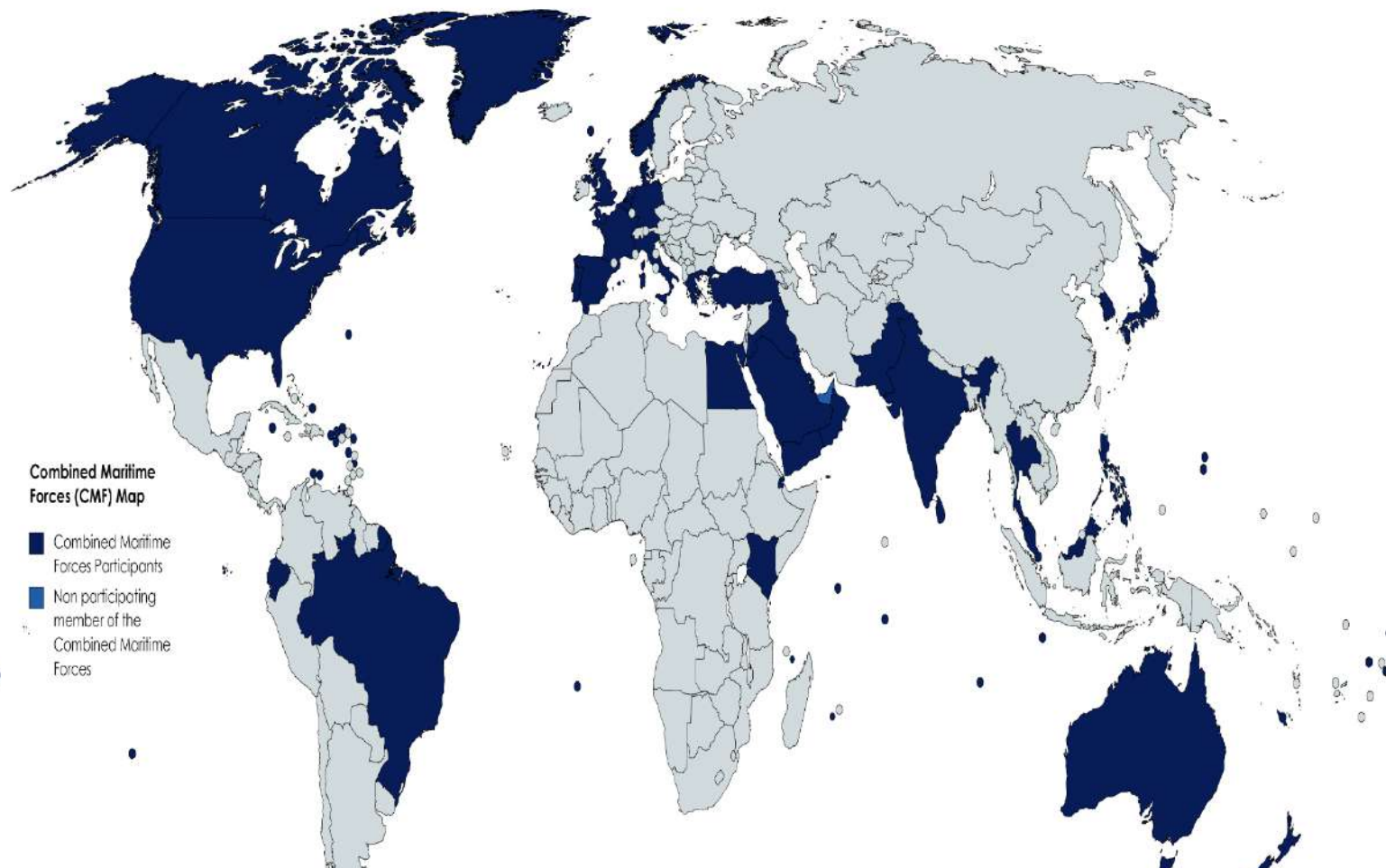


Terminology

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The PHIA Probability Yardstick							
The DI Yardstick is used throughout this document to indicate the level of confidence in the judgements made in this product.							
Qualitative Statement	Remote Chance	Remote or Highly Unlikely	Unlikely	Realistic Possibility	Likely or Probable	Highly Likely	Almost Certain
Associated Probability	< 5%	10-20%	25-35%	40-50%	55-75%	80-90%	> 95%



Combined Maritime Forces (CMF) Map

- Combined Maritime Forces Participants
- Non participating member of the Combined Maritime Forces



CMF Naval Intelligence Regional Update

THANK YOU
Any questions?

Mombasa Conference
1-4 Sep 2025