

Type:	Analytics	Version:	1.2	Classification:	Restricted
Created:	20240307			Status:	Live
Title	AMBREY THREAT CIRCULAR – 07/03/2024				



AMBREY THREAT CIRCULAR – HOUSHI STRIKE CAUSES FIRST CREW FATALITIES

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The following reports remain active:

Ambrey Threat Circular – US and UK strikes against Houthi military targets, 12th of January 2024.
 Ambrey Threat Update – Red Sea, Gulf of Aden, Arabian Sea, Gulf of Oman, and Indian Ocean, 2nd of February 2024.

Ambrey Threat Circular – Houthi targeting profile, 12th of February 2024.

A. Executive Summary

- Three crew members were killed following a Houthi anti-ship ballistic missile strike on the bulk carrier TRUE CONFIDENCE.
- These were the first crew fatalities since the Houthis began attacking merchant shipping in response to the Israel-Hamas conflict. In the whole of 2023, only one merchant vessel crew member died from a security event in a different theatre.
- Ambrey has verified the vessel was formerly US-financed through Oaktree Capital Management, and was owned by a non-US national, through a Greece-based company: Third January Maritime Ltd.
- Houthis warned the merchant vessel ahead of the attack, the crew turned her around, drifted, and then were attacked.
- The vessel had a strong public affiliation with the Houthi target profile ahead of the transit. The vessel was still listed as owned by Oaktree Capital Management prior to the attack.

B. Situation

The TRUE CONFIDENCE was a Barbados-flagged bulk carrier headed northwest from Lianyungang, China, destined for Jeddah, Saudi Arabia, carrying steel products and vehicles. In the early morning of the 6th of March 2024, southwest of Aden, the Houthis warned her over VHF to alter course. The crew turned her around from the Bab al Mandab and headed approximately 30M southeast, where they commenced drifting. Subsequently, the Houthis fired an anti-ship ballistic missile at the merchant ship. The vessel sustained damage to the superstructure. As a result, three crew members were killed. Two of the deceased crew members were Filipino nationals. The vessel had 23 crew members, including 20 crew and three guards. Their nationalities were: one Indian, four Vietnamese, and 15 Filipino crew; one Nepalese and two Sri Lankan guards. Some of the crew departed on a life raft and the bulker was abandoned. The Indian Navy's Kolkata-class destroyer INS KOLKATA responded, rescued the crew, and treated the crew for their injuries. The crew were subsequently transferred to Djibouti onboard the destroyer. The Houthis claimed responsibility for the attack; they characterised the vessel as "American".

C. Analysis

The Houthis bear responsibility for the deaths of these crew members. They have claimed it was an "accident", but they are intentionally firing Unmanned Aerial Vehicles and missiles at shipping. The fatalities were only a matter of time. The Houthis again incorrectly identified a vessel's affiliation. The US ownership was publicly and inaccurately listed on several vessel database sites at the time of the attack. Another bulk carrier in the Third January Maritime fleet, TRUE BROTHER, had passed through the Red Sea and Gulf of Aden without incident three weeks earlier but did not have the same American affiliations on these sites. The

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Houthis are highly likely using publicly available information to select targets. Ambrey is confident that an Ambrey Vessel Affiliation Check (AVAC) would have identified the strong affiliation with the Houthi target profile ahead of time, and advice would have been given to avoid the transit. In the event of the transit still proceeding, Ambrey would have advised mitigation measures that would have likely reduced risk. Based on recent incidents, there is a correlation between electronic signals being emitted, and damage sustained to a vessel. To date, only American- and British-owned vessels have been targeted, whilst the targeting profile for Israeli vessels has remained broader.

D. Mitigation

The vessel's US affiliation would have been flagged by an AVAC. Ambrey recommends an affiliation check as part of a transit risk assessment is performed for all Red Sea, Gulf of Aden, Arabian Sea, Gulf of Oman, and Arabian Gulf voyages.

Vessels assessed to be at high risk are advised to re-consider their voyage, which could include re-routing via the Cape of Good Hope.

Note that the Houthi target profile could change during a voyage. This should be regularly checked and managed with an intelligence provider.

Some companies have received an e-mail from the "Humanitarian Coordination Center (HOCC)", based in Sana'a, Yemen. This is a Houthi organisation. It listed criteria for the "ban" on ships in the Red Sea, Gulf of Aden, and Arabian Sea. The HOCC does not have any internationally recognised authority to dictate the terms of transits. Companies should also be aware that the US government has designated the Houthis to be a Specially Designated Global Terrorist Group, effective from the 16th of February 2024.

AIS transmissions and other signal emissions ought to be stopped if at heightened risk. Irregular and frequent course and speed alterations also are assessed to reduce the likelihood of damage.

Companies should be prepared to make decisions quickly in the event of being targeted. They should practice Crisis Management responses to likely scenarios with all relevant stakeholders.

All deck movements should be halted where possible when transiting heightened-risk areas. Bridge manning should be reduced to a minimum.

E. Contact Information

- Ambrey: +44 203 503 0320, intelligence@ambrey.com. Ambrey advisories are available to Sentinel subscribers and digital operations support is available through the Guardian service. Contact your Account Manager for further information.
- Fifth Fleet Battle Watch: +973-1785-3879, and email details to: cusnc.bwc@me.navy.mil.
- Fifth Fleet NCAGS: cusnc.ncags_bw@me.navy.mil.
- IMSC: m-ba-imsc-bwc@us.navy.mil or +973-1785-8412/8192/8193.
- UKMTO: watchkeepers@ukmto.org or +44 (0) 2392 222060. UKMTO advisories and warnings are available at <https://www.ukmto.org/>.
- U.S. Coast Guard National Response Center: +1-800-424-8802.
- USCG NAVCEN: www.navcen.uscg.gov/contact/gps-problem-report or +1-703-313-5900.

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