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| Created: | 20250318 | | | Status: | Live |
| Title | AMBREY THREAT CIRCULAR – 18/03/2025 | | | | |



AMBREY THREAT CIRCULAR – WAR RESUMES IN MIDDLE EAST

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A. EXECUTIVE SUMMARY

- The Israel-Hamas ceasefire has been declared over with a resumption of operations in the Gaza Strip.
- The US are in the process of conducting an extensive campaign against Ansar Allah (“the Houthis”).
- Merchant shipping is at risk of collateral damage offshore Israel.
- Israel-affiliated shipping is at risk of targeting in the Red Sea and Gulf of Aden, including companies that trade with Israel.
- A continuation of the US campaign against the Houthis is assessed to highly likely increase the risk to US merchant shipping.
- The US has increasingly threatened Iran with military action since talks have not been established.
- US shipping and related tankers are assessed to be at risk of Iranian retaliation.
- Military action against Iran is assessed probable if negotiations are not commenced.

B. SITUATION

On the 18th of March 2025, Israel resumed offensive operations in the Gaza Strip, with Israel's Prime Minister, Benjamin Netanyahu, declaring the Israel-Hamas ceasefire to be over due to a “lack of progress in talks to extend the ceasefire”. The resumption of conflict was preceded by an end of ‘Phase 1’ of the ceasefire without an extension or ‘Phase 2’ having been agreed upon. Subsequent negotiations did not bridge the gap, and Israel halted all humanitarian aid into the Gaza Strip while ceasing the provision of electricity. In response, the Houthis set a 4-day ultimatum and ultimately re-instated their ‘ban’ on Israeli-owned and -flagged shipping.

US President, Donald Trump, is using the threat of military action to force Iran to participate in negotiations over their nuclear program and regional influence. Iran's president, Masoud Pezeshkian, initially signalled willingness to negotiate despite the Supreme Leader, Ali Hosseini Khamenei, rejecting any talks. However, Pezeshkian has since aligned his position with Khamenei's. On the 7th of March Donald Trump stated, “We can't let them [Iran] have a nuclear weapon. Something is gonna [sic!] happen very soon. I would rather have a deal than the other option, but the other option will solve the problem.” Following the US airstrikes on Yemen, Trump threatened Iran to not further support the Houthi, and on the 17th of March, the US president reiterated: “From now on, every shot fired by the Houthi will be considered as a shot fired by the weapons and leadership of Iran, and Iran will be held accountable and suffer the consequences.” In a letter to the UN Security Council (UNSC), Iran's ambassador to the UN, Saeid Iravani, declared: “Iran warns that any act of aggression will have severe consequences, for which the US will bear full responsibility.”

The US recommenced attacks against the Houthi on the 15th of March 2025. The Houthis have vowed retaliation and targeted the US aircraft carrier, USS HARRY S TRUMAN, on three separate occasions in the Red Sea. The leader of the Houthis, Abdul-Malik al-Houthi, stated: “American aircraft carriers and warships will be our targets, and the decision to ban navigation will include the Americans as long as they continue their aggression.” The Houthis have focused on targeting US military assets, reserving the right to target US merchant shipping in case of continued US airstrikes. The US 5th Fleet has been declared to be in a state of ‘sustained combat operations’ confirming US Secretary of Defence, Pete Hegseth, claims that operations would continue “until they stop acting aggressively against US ships in the region.”

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C. THREAT UPDATE

The end of the Israel-Hamas ceasefire will likely reintroduce the threat of stray rocket fire against the Israeli ports of Ashkelon and Ashdod. No merchant vessels reported damage during the first phase of the conflict. Hezbollah’s capability to participate in this round of escalation remains questionable. If they were capable, there would be a risk to Haifa and offshore platforms. Hezbollah agreed to an independent ceasefire. Since then, Israel has launched attacks against Hezbollah in recent weeks without a noticeable Hezbollah response. The Lebanon-based group continues to regroup after the significant losses incurred during the conflict and likely lacks the capability to meaningfully engage Israel at this time.

The Houthis are assessed to be highly likely to resume military operations against Israeli military bases and the port of Eilat. After the group had already reinstated a ‘ban’ on Israeli-owned or -flagged merchant shipping, it is likely to resume operations against Israel-affiliated shipping and companies conducting trade with Israel.

With the threat to escalate, the Houthis are likely to commence targeting US-owned merchant vessels in response to continued US airstrikes. Houthi statements were initially based on the understanding that the US and UK were conducting joint airstrikes. Subsequent statements have since referred to the US only; however, the Iranian letter to the UNSC stated, “The Islamic Republic of Iran unequivocally condemns the recent military aggression and unlawful use of force against Yemen by the United States and the United Kingdom.” This and the initial Houthi statements indicate that there is a heightened risk to UK-owned shipping as well.

In the medium term, there is forecast to be increased US pressure on Iran. There is a heightened risk that brinkmanship will lead to a direct military confrontation. The US has already threatened to target Iranian assets aiding the Houthis and to enforce the US sanctions regime on Iranian shipping. Targeted assassinations and vessel seizures would highly likely increase the risk to shipping in the Persian/Arabian Gulf, Gulf of Oman, and Arabian Sea.

D. MITIGATION

- Affiliation checks against the Houthi and Iran target profile: Ambrey recommends a thorough affiliation check as part of a transit risk assessment is performed for Red Sea, Gulf of Aden, Arabian Sea, Gulf of Oman, and Persian/Arabian Gulf voyages. Ambrey continues to adjust these as per the developing intent and threat.
- Ship Security Assessments: Merchant shipping assessed to be at heightened risk is advised to carry out Ship Security Assessments tailored to the threat and to implement recommended and proportionate ship protection measures before sailing.
- Physical security: Private Armed Security Teams can be highly effective against certain threat vectors. Ambrey continues to recommend considering increased team sizes with appropriate armament.
- Bridge support: Private Armed Security Teams/Unarmed advisors to prepare and reassure crew and assist with military liaison. Digital operations can also support with route planning and keep the bridge and shore staff informed of any changes in risk while enroute.

E. CONTACT INFORMATION

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