



Title: US-Israel Conflict with Iran

Risk Level: **CRITICAL**

SUMMARY

On 28 February 2026, the US and Israel launched coordinated attacks against Iran. The move comes following an inconclusive result of indirect talks between the US and Iran on Thursday. In response, Iran has targeted Israel and various states in the Gulf region in a series of kinetic attacks.

This ongoing US-Israeli conflict with Iran is a massive escalation in longstanding regional tensions, and there are no signs of a resolution in the short to medium term. The maritime security situation is highly volatile, and vessels continue to face a variety of threats. **All vessels are advised to avoid transit in the Arabian Gulf, the Strait of Hormuz, the Gulf of Oman, and the Northern Arabian Sea. Spillover events are also expected in the Red Sea, the Bab el-Mandeb Strait, and the Gulf of Aden, and these areas should also be avoided.**

SITUATIONAL OVERVIEW

Kinetic Activity

ARC has now recorded 32 incidents involving vessels and kinetic weapons in the Gulf of Oman and the Arabian Gulf. Vessels have been hit directly by drones and missiles and hit by fallen debris from intercepted weapons, resulting in casualties and damage. In the last two weeks there was a nine-day lull in reported vessel incidents between 21-30 March 2026. There have been no incidents reported since 31 March 2026, but the threat remains elevated and incidents can occur at any time during this conflict.

Incidents involving merchant vessels have largely been reported around the Strait of Hormuz and the eastern Arabian Gulf; however, vessels have also been affected further west in the Arabian Gulf and further east in the Gulf of Oman. The IRGC has openly claimed responsibility for several attacks against vessels in the region due to alleged links to the US and Israel. Not all the vessels targeted by Iran have had explicit links to either country, and therefore all vessels are vulnerable to attack regardless of affiliation. Iran's Islamic Revolutionary Guard Corps (IRGC) has also claimed responsibility for several attacks that are not confirmed to have taken place. These false claims are likely to create confusion, reiterate Iran's threat to shipping, and remind the industry of the ongoing blockade in the Strait of Hormuz.

Iran's military campaign in the Gulf is ongoing, and Gulf states continue to intercept missiles and drones daily. It is assessed that Iran will continue to target logistic and energy infrastructure throughout this conflict, and additional maritime-related incidents are highly likely. Ports in the UAE remain the highest risk as the country's port infrastructure has been targeted more than any others in the region.

The following port-related developments have been reported since our last advisory:

- The Port of Shuwaikh in Kuwait was targeted in drone strikes on 27 March 2026. Material damage was reported at the port, but there were no casualties. The port is open and operational but is running at ISPS Level 2. Kuwait's Mubarak Al-Kabeer Port, which is currently under construction, also sustained damage following drones and missile attacks on the same day.



- Operations at Oman's Port of Salalah are partially suspended. Damage was reported and one worker was injured at the port following a drone strike on 28 March 2026. Merchant vessels were reportedly asked to vacate the port shortly after the attack. Port officials initially suspended all operations in port, but have since resumed operations at the container and general cargo terminals.

Recommendation: *Kinetic activity is expected to continue in the region in the short to medium term. The threat of incidents involving kinetic weapons – including direct hits and collateral damage – is high in the Arabian Gulf and the Gulf of Oman, both at ports and in territorial waters. Vessels that are drifting or at anchor are particularly vulnerable in the region. Calls to ports in the region should be avoided. This applies to all vessels regardless of affiliation. Vessels are advised to continue monitoring this rapidly evolving situation.*

The Strait of Hormuz

Iran's IRGC continues to enforce its blockade on the Strait of Hormuz, having directly targeted a vessel in the waterway on 18 March 2026. There have been six incidents involving vessels reported in the Strait, with one attack resulting in fatalities. Iran has still not issued a formal and legal declaration that the Strait is closed, but the repeated threats against vessels should be taken seriously as an indication that the threat level is extreme. The number of attacks that have already occurred in the Strait and the uncertainty surrounding the blockade are contributing factors to this elevated threat level.

On 22 March 2026, Iran's Ministry of Foreign Affairs reportedly stated that the Strait of Hormuz is open to "non-hostile" vessels. This was broadly defined as vessels that are not affiliated with the US and Israel. The statement reportedly went on to say that "non-hostile" vessels hoping to transit through the Strait should "fully comply with the declared safety and security regulations." The statement did not explain the nature of these regulations. **Despite these comments, the Strait is still unsafe for all vessels regardless of affiliation.**

AIS data continues to show that traffic through the Strait is very low, but there are ongoing reports that the IRGC has allowed a small number of vessels to transit through the Strait following a vetting and clearance process. Vessels using this process are reportedly required to submit full documentation to obtain clearance and must accept escorted passage through a corridor controlled by the IRGC. The IRGC has asked for payment in exchange for clearance for some vessels, and local media reported this week that the country's National Security Committee has approved a bill allowing the country to impose fees for Strait of Hormuz transits. In the last week, reports have also indicated that the IRGC may be contacting shipping companies in "friendly" nations to make arrangements for transits. Iran's clearance process should not be considered as a way to mitigate risk for transits through **the Strait. Companies that choose to interact with the IRGC may be exposed to a high level of legal and reputational risk, and the threat of collateral damage persists for vessels in the Strait regardless of whether they are cleared by Iranian forces.**

Sea Mines: On 11 March 2026, major media outlets reported that Iran intends to deploy naval mines in the Strait of Hormuz. There have since been reports that US officials claimed there are at least a dozen sea mines in the Strait. Though the presence of mines in the Strait has not been confirmed, the threat should be treated as credible. This development further increases the threat level in the region, as the use of naval mines would inevitably cause substantial damage to vessels and increase the potential for casualties.

Vessel Congestion: As traffic through the Strait of Hormuz remains low, hundreds of vessels continue to be stranded in the Arabian Gulf and in the Gulf of Oman. This has caused congestion near ports and anchorages in the area, particularly near the entrances to the Strait. There continues to be a risk of collisions due to the congestion.



Recommendation: *It is recommended that vessels do not attempt to transit through the Strait of Hormuz as the risk of attack is very high. This applies to all vessels, but particularly vessels affiliated with the US and/or Israel or carrying cargo from either of these countries. Due to the risk of collision brought on by vessel crowding, vessels that are currently located on either side of the Strait are advised to exercise caution whilst navigating in the area.*

Electronic Interference

Vessels continue to experience problems with electronic navigation equipment due to electronic interference in the region. The frequency of incidents has reduced in recent days, but the issue continues to pose a threat to vessels in the region. Vessels off Fujairah, UAE may be particularly affected.

Electronic interference is a long-standing problem as a result of elevated tensions, made worse by the current conflict. Merchant vessels are not usually the direct target of electronic interference but are typically indirectly affected by efforts to compromise military equipment.

Challenges with navigational equipment pose a serious threat to vessels, elevating the risk of unintended diversions and collisions. This is of particular concern near ports in the Arabian Gulf and the Gulf of Oman, where congestion is an ongoing problem. Electronic interference is likely to worsen in the Red Sea as well, given the Houthis' intention to resume attacks against vessels.

Recommendation: *Vessels in the Arabian Gulf, the Strait of Hormuz, the Gulf of Oman, and the Red Sea are advised to monitor all electronic navigational aids for interference. Non-electronic methods of position fixing should be used to confirm positioning, and extra watches are advised*

Houthi Attacks in the Red Sea

After repeated statements of intended support for Iran, the Houthis formally entered the conflict with missile strikes against Israel on 28 March 2026. News of the Houthis' involvement in the US-Israel-Iran conflict has raised concerns that attacks on vessels in the Red Sea region could resume. There is currently no indication that the Houthis will resume maritime operations imminently. However Houthi statements since the escalation indicate the group remains both willing and capable of targeting vessels.

Vessel traffic in the Red Sea has increased since the Houthis paused attacks in October 2025. The latest increase is partly driven by Saudi Arabia's greater reliance on Red Sea ports due to insecurity in the Arabian Gulf. This allows for a larger selection of vessels the Houthis could target, thereby increasing the threat to vessels in the region. Separately, local reporting last week stated that Iranian officials threatened to target vessels in the Bab el-Mandeb and the Gulf of Aden, further elevating the threat in the region.

If the Houthis resume maritime attacks, the target profile is still unclear. Vessels with US and Israeli links are likely to be key targets; however, the risk extends to all vessels given the group's history of targeting based on inaccurate or outdated information.

Recommendation: *Transits through the Red Sea, the Bab el-Mandeb Strait, and the Gulf of Aden should be avoided. This applies to all vessels, but particularly vessels affiliated with the US and/or Israel or carrying cargo from either of these countries.*



INCIDENTS

The following incidents were reported in the Arabian Gulf and the Gulf of Oman since our last report:

- **30 March 2026. Kinetic Attack. 30nm NE of Dammam, Saudi Arabia.** A containership reported two projectile objects landing in close proximity, each landing within one hour of each other. The incident occurred whilst the vessel was underway in the Arabian Gulf. The crew were reported safe, and the vessel did not sustain any damage.
- **30 March 2026. Kinetic Attack. 27nm from Dubai, UAE.** An unconfirmed projectile object reportedly hit a tanker on the starboard side, causing a fire on board. The crew was reported safe. Media reports state the fire was extinguished and there were no signs of an oil leak.
- **31 March 2026. Kinetic Attack. 17nm N of Doha, Qatar.** A tanker was hit by two unconfirmed projectile object on the port side. One caused a fire, which has been extinguished. The second was reportedly unexploded within the vessel's engine room. The crew was reported safe.

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