



Title: US-Israel Conflict with Iran

Risk Level: **CRITICAL**

SUMMARY

On 28 February 2026, the US and Israel launched coordinated strikes against Iran following inconclusive indirect talks between Washington and Tehran. Iran responded with a series of kinetic attacks targeting Israel and several Gulf states. On 7 April 2026, all parties agreed to a two-week ceasefire, contingent on the cessation of hostilities and the reopening of the Strait of Hormuz. Negotiations are set to continue this week with the aim of securing a lasting agreement; however, the durability of the ceasefire remains uncertain. This uncertainty stems from subsequent developments, including Iran's accusation that Israel has breached the ceasefire through continued strikes in Lebanon, as well as the reported persistence of Iran's blockade in the Strait of Hormuz.

This ongoing conflict continues to cause volatility in the regional maritime security situation. ***All vessels are still advised to avoid transit in the Arabian Gulf, the Strait of Hormuz, the Gulf of Oman, and the Northern Arabian Sea. Spillover events are possible 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 34 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. 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; however, not all the vessels targeted by Iran have had explicit links to either country.

Missile and drone activity was reported in the UAE, Kuwait, Saudi Arabia, and Bahrain in the hours following the ceasefire announcement, but overall there have been fewer attacks reported in the Gulf region today. However, the ceasefire is fragile and at risk of collapse, raising the likelihood that attack frequency could pick up again within the next two weeks. Renewed attacks are likely to target logistic and energy infrastructure once again, leading to an elevated risk of maritime-related incidents.

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

- Operations at the Khor Fakkan Port in the UAE were briefly suspended earlier this week after unconfirmed projectile objects landed near a vessel at berth. The port has since resumed normal operations.
- The Port of Salalah has resumed all operations following a partial suspension last week.
- The Bahraini Port of Khalifa Bin Salman has temporarily suspended operations from Wednesday, 8 April 2026 to Friday, 10 April 2026.



Recommendation: *The threat of incidents involving kinetic weapons – including direct hits and collateral damage – is still 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

The circumstances in the Strait of Hormuz are effectively unchanged despite the ceasefire, largely due to the significant level of uncertainty surrounding the terms of the agreement. The agreement is reported to have included provisions for the reopening of the strait and the easing of navigational restriction, a condition that the US has stated Iran has accepted. However, Iranian officials have suggested that Iran's continued control of the waterway was accepted. A limited number of vessels have transited through the strait since the ceasefire, though overall traffic remains at a fraction of normal levels.

Iran is maintaining strict control over the waterway, with some vessels in the region reportedly receiving VHF messages communications from Iranian authorities stating that the strait remains closed. Reports state the IRGC is still requiring vessels to seek prior permission before transit, in a verification process that involves the submission of detailed documentation toll payments. Vessels affiliated with the US or Israel are barred entirely, and reports suggest that the verification requirements can vary from vessel to vessel. The IRGC has threatened to attack any vessels that attempt to transit the strait without permission. Additionally, reports in Iranian media have also indicated that Iran tightened restrictions in the last 24 hours by barring tanker traffic in the strait. This move came in response to Israel's continued strikes in Lebanon. Iran considers these ongoing strikes a violation of the ceasefire, whilst the US and Israel maintain that Lebanon was not part of the agreement.

Iran has also issued a revised traffic separation scheme (TSS), routing vessels through Iranian territorial waters between the islands of Qeshm and Larak. This revised TSS was reportedly established to ensure that the IRGC can have oversight and control over transits through the strait. In the announcement of the new TSS it was also stated that the use of the internationally recognised TSS is prohibited, with Iranian authorities claiming a need to avoid potential naval mines that were laid in earlier days of the conflict. Previous claims of mine deployment, though credible, are still unconfirmed.

Overall, conditions in the Strait of Hormuz remain highly restrictive and volatile. Iran continues to assert control, and the risk to commercial shipping remains elevated. Uncertainty and the broader instability linked to the ceasefire's fragility all contribute to a persistently high-risk environment for vessels in the region.

Recommendation: *It is recommended that vessels do not attempt to transit through the Strait of Hormuz. This applies to all vessels, but particularly vessels affiliated with the US and/or Israel or carrying cargo from either of these countries. Given the lack of transparency surrounding the IRGC's verification procedure, as well as the logistical ambiguities and apparent inconsistencies in the process, there remains a high level of reputational, legal, and operational risk involved with seeking permission from the IRGC. 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 weeks, 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.

Recommendation: *Vessels in the region 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 raised concerns that attacks on vessels in the Red Sea region could resume. These concerns were heightened earlier this week when Iranian officials stated that Iranian allies could disrupt shipping in the Bab el-Mandeb Strait.

Since the conflict started, there have been no reports of any Houthi attacks targeting vessels. Despite the recent comments by Iran, it is currently unclear whether the Houthis will choose to resume maritime operations in the Red Sea region. The Houthis remain both willing and capable of targeting vessels, and do maintain a strategic partnership with Iran. Increased vessel traffic in the Red Sea, driven by Saudi Arabia's greater reliance on its Red Sea ports, has also allowed for a larger selection of vessels the Houthis could target. However, the group's limited involvement in the conflict is an indication of their independence from Iran even with the ongoing partnership. The temporary US-Israel-Iran ceasefire may reduce the likelihood that the Houthis will increase their involvement in this war, but overall the volatility surrounding this agreement makes the possibility of Houthi attacks in the Red Sea region even more uncertain.

Whether the Houthis decide to maintain a limited involvement in this conflict or ramp up their engagement remains to be seen, and depends on which option would be most beneficial to the group strategically. If the Houthis resume maritime attacks, the target profile is still unknown. 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:

- **April 2026. Kinetic Attack. Khor Fakkan Port, UAE.** The Master of a containership reported witnessing several splashes from unknown projectiles near the vessel. The incident occurred whilst the vessel was alongside conducting loading operations.
- **7 April 2026. Kinetic Attack. 25nm S of Kish Island, Iran.** A container vessel was hit by an unconfirmed projectile object, which has caused damage above the waterline. The crew was reported safe and no environmental damage was reported.

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