

THREAT LEVEL: HIGH

THE RETURN OF SOMALI PIRACY

Warships have moved north, smuggling money has dried up, and pirates are back in the Gulf of Aden and the Somali Basin.

REPORTING TO
6 October 2026

COVERAGE
Gulf of Aden · Somali Basin · Yemeni coast

BOTTOM LINE

Somali piracy is back at its highest level since 2013

Operation Atalanta figures cited by the Soufan Center show 25 piracy incidents off the Horn of Africa from January to mid-September 2026, almost three times the nine in all of 2025. Six merchant ships have been hijacked since late April.

The Soufan Center calls it the highest level since 2013. Thinner naval cover is a key factor: the warships that kept piracy down have been pulled north to the Red Sea and Hormuz, and the conditions on land behind the 2008 to 2012 crisis never went away.

25
incidents to mid-September, against 9 in all of 2025

6
merchant ships hijacked since 21 April

5
crew killed aboard *Honour 25*, the first such deaths in over a decade

60+
seafarers held hostage in late summer

KEY JUDGEMENTS

01 **Thinner naval cover is a key factor.** Atalanta had two frigates on station this spring. India moved frontline ships north in late March.

02 **Hormuz changed the incentives.** Atalanta's commander says groups stopped receiving money when the US blockade hit smuggling from Pakistan.

03 **Not a replay of 2011.** Volumes are a tenth of the peak, but targeting is selective: tankers, sanctioned and disputed ships.

04 **Violence is rising.** Pirates killed five *Honour 25* crew before the 29 September rescue.

05 **Peak risk is now.** October and November are the post-monsoon window, and summer ransoms will fund new groups.

THREATRATE THREAT LEVEL: GULF OF ADEN & SOMALI BASIN

LOW | MODERATE | ELEVATED | **HIGH** | EXTREME

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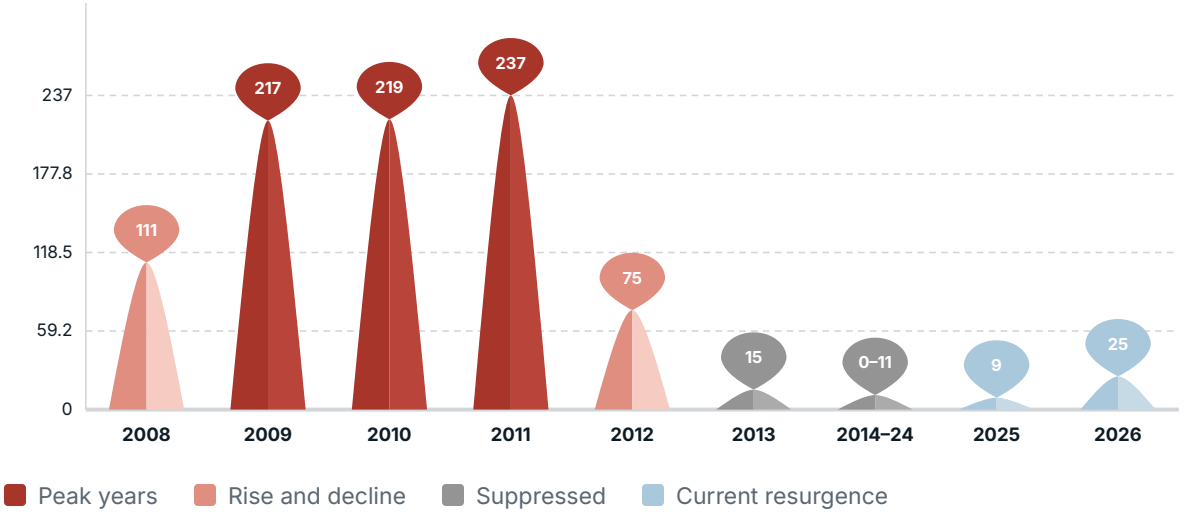
INCIDENT TRENDS, 2008 TO 2026

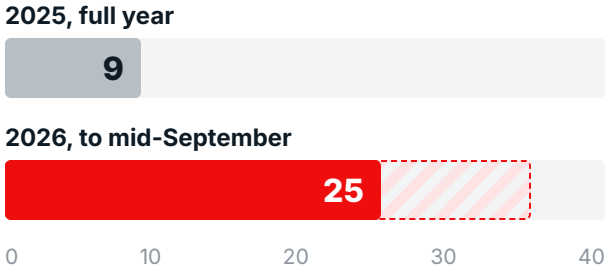
Nearly three times last year, still a fraction of the peak

ATTACKS OFF SOMALIA AND IN THE GULF OF ADEN



2008 to 2013: IMB annual reports. 2025 to 2026: EUNAVFOR Atalanta. Different definitions, not directly comparable.

2025 AGAINST 2026



The dashed outline shows the full-year total of about 35 if the current pace holds.

Two counts, one trend. EUNAVFOR counts every attack, boarding, approach and dhow seizure. AFP's analysis of IMO data uses a narrower definition and found 15 attacks by 27 August against 5 in 2025.

237 attacks at the 2011 peak, when piracy cost the world about $7 billion

+178% rise in incidents on 2025, with three and a half months still to run

~35 incidents in 2026 if the January to September pace holds

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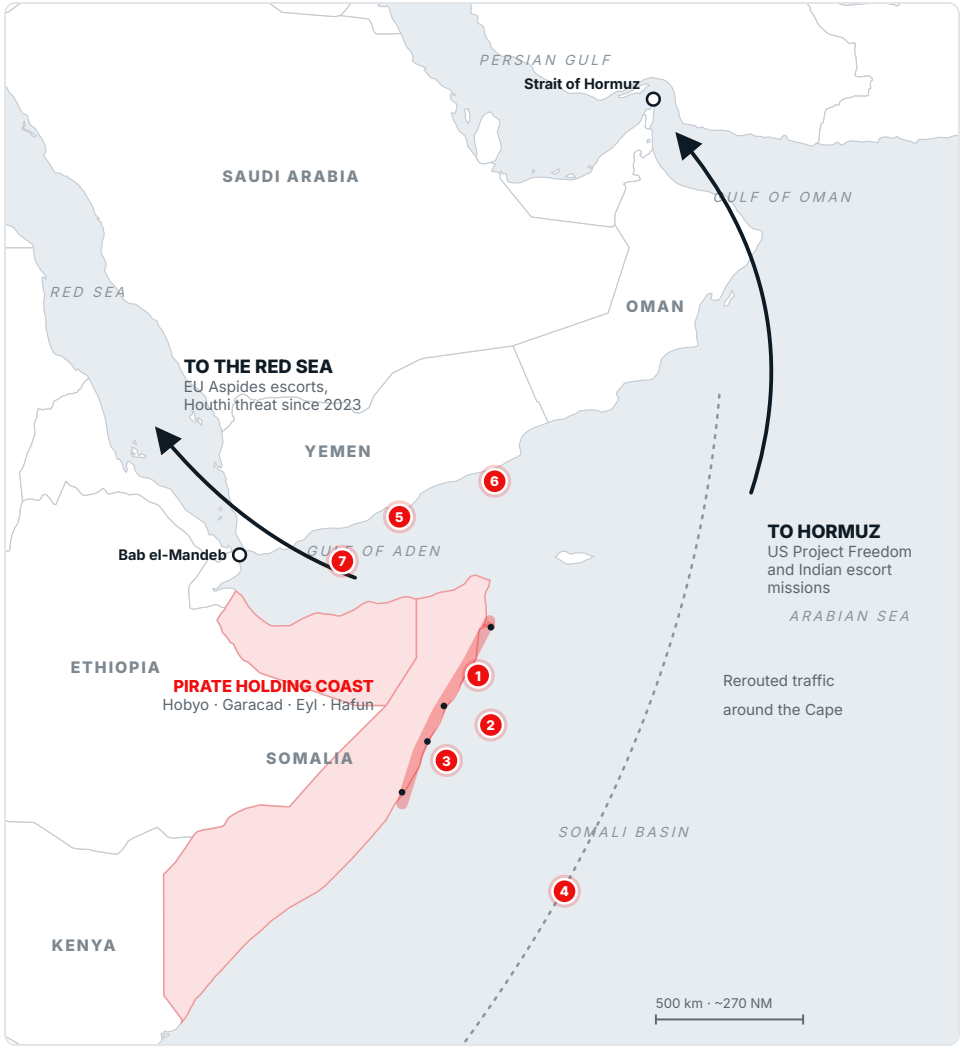

Map: ThreatRate, based on open-source reporting to 6 October 2026. Positions approximate.

21 APRIL ONWARDS

From opportunism to a campaign

The surge began when the tanker *Honour 25* was hijacked off Puntland on **21–22 April**. Within twelve days pirates had taken *Sward* and *Eureka*, and an approach on a tanker 500 NM out to sea was reported. A captured ship then served as a mothership for further raids.

AREA	REPORTED ACTIVITY
Inshore basin	*Honour 25* (21–22 Apr) and *Sward* (26 Apr) hijacked. *Elfriede*'s armed guards drove off an attack (23 Apr).
Offshore	A suspect vessel and skiff approached a tanker 500 NM east of Mogadishu (28 Apr).
Yemeni coast	*Eureka* boarded at anchor off Qana (2 May). *Sibu 1* seized 136 NM east of Mukalla (20 Aug).
Gulf of Aden	*Glamor* boarded (10 Sep). Crew in the citadel; a Japanese aircraft and Indian warship responded.
Holding coast	Ships taken to anchorages at Hobyo, Garacad, Eyl and Hafun.

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HOW THE NAVAL UMBRELLA WAS DISMANTLED

Thinner naval cover opened the door.

Jan 2023 — **High Risk Area removed.**

Nov 2023 — Houthis begin attacking ships. Navies shift to the **Red Sea**.

Feb 2024 — EU launches **Aspides**.

Oct 2025 — Houthi attacks halt after Gaza ceasefire. Warships stay in the Red Sea.

Feb 2026 — US and Israeli strikes on Iran. **Hormuz crisis** begins.

Mar — India launches **Urja Suraksha**, moving warships north.

24 Mar — **Hijacking run begins**, per GI-TOC.

4 May — US **Project Freedom** escorts through Hormuz.

28 Sep — EU: Aspides has **"not enough frigates"**.

THE RED SEA PULL

From late 2023 Western navies concentrated on Bab el-Mandeb. Aspides needed at least ten ships but rarely had more than about six. The ships stayed after the October 2025 ceasefire.

THE HORMUZ PULL

The Iran war drew in the rest. India sent more than five frontline warships to escort energy cargoes and the US launched destroyer escorts. A European mission was pledged, but none had begun.

WHAT WAS LEFT

Atalanta has about two ships plus aircraft to cover a 3,300 km coastline and hundreds of miles of open ocean. Japanese aircraft and occasional Indian and Turkish ships fill some gaps. There is no coordinated coalition response.

2 Atalanta frigates on station in spring 2026

~6 Aspides warships at most, against a need of ten or more

4 of the 6 ships hijacked since April were tankers (RUSI)

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WHY THEY CAME BACK

Two pressures behind the surge

1 · THE HORMUZ SQUEEZE

Many piracy networks had moved into smuggling weapons, drugs and migrants. Atalanta's commander, Vice Admiral Ignacio Villanueva Serrano, says the groups **stopped receiving money** when the US blockade hit smuggling from Pakistan.

2 · SOFTER, RICHER TARGETS

Most Asia to Europe traffic still avoids Suez, and Cape-bound ships pass Somalia's coast. Higher oil prices made tankers more valuable. With the High Risk Area gone, industry has cut protection costs. Aid cuts, illegal fishing and rising prices on land deepen poverty and grievance.

THEN VS NOW

FACTOR	2008 TO 2012	2026
Naval cover	Dense, multinational	**Spread thin across three theatres**
Armed guards	Industry standard	**None on any hijacked ship (RUSI)**
Targets	Any ship within reach	**Tankers, sanctioned and disputed ships**

THE CRITICAL EXTERNAL VARIABLE

The Houthi and Al-Shabaab nexus

The Royal United Services Institute (RUSI), a London defence and security think tank, says the Houthis may have been involved in the *Eureka* and *Asana* hijackings and financed *Sward*. The Global Initiative Against Transnational Organized Crime (GI-TOC), a Geneva research network, reports an alleged coordination meeting in Yemen in mid-June that it could not verify. The Soufan Center, citing the UN, describes Al-Shabaab stepping up piracy in return for Houthi weapons. None of this is confirmed.

COMMERCIAL ONLY Piracy stays a ransom business that guards and navies can deter.

INDIRECT SUPPORT Weapons, training and finance give groups reach and staying power.

DIRECT ROLE Hijackings become a proxy tool in the Red Sea conflict.

CRIMINAL BUSINESS — PROXY INSTRUMENT

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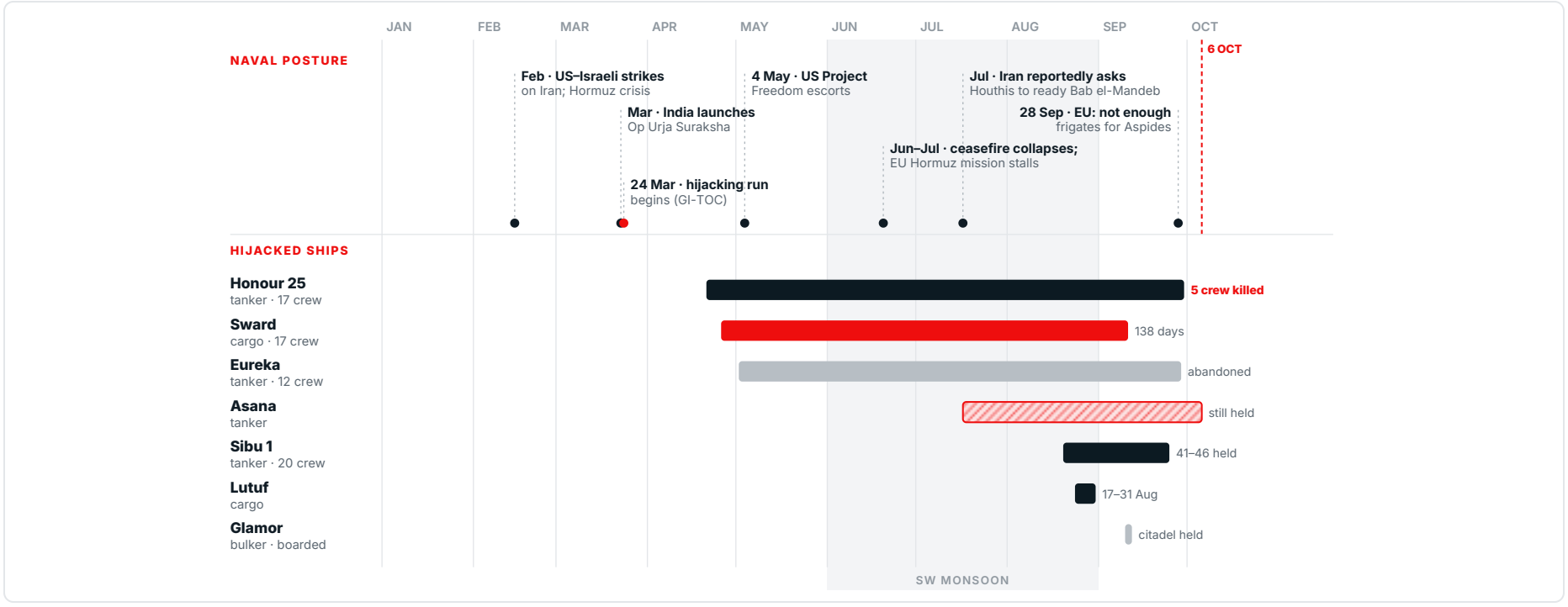
HOLD TIMES AND OUTCOMES, 2026

Six ships taken, three ways out



Released after ransom · Freed by force · Abandoned by pirates · Still held · Southwest monsoon

138 days

Sward held before a ransom of $1.7 to 2.7M was reportedly paid

$10M

Eureka ransom demand, up from $3.5M

57–62

suspects detained in the *Honour 25* and *Sibu 1* operations

1

ship still held: the tanker *Asana*, seized 17 July

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OCTOBER 2026 TO MARCH 2027

Three scenarios: the risk peaks before the northeast monsoon

October and November are the main danger window before the northeast monsoon limits small boats from December. Ransom money, mothership use and thin naval cover all point to more attacks.

LIKELIHOOD: LOW

Navies return south

A durable Hormuz ceasefire frees escorts. Atalanta and India rebuild patrols and shipowners re-embark guards. Activity falls toward 2025 levels.

Requires: a stable Gulf. Unlikely before 2027.

LIKELIHOOD: MOST LIKELY

Sustained high activity

Escorts stay tied to Hormuz and the Red Sea. Two to four more hijacking attempts by year end, mainly slow tankers and bulkers in the Gulf of Aden and the inshore basin. More forcible recoveries by Somali and Turkish forces.

Consequence: higher hostage risk during rescues.

LIKELIHOOD: LOW TO MODERATE

Bab el-Mandeb closes

The Houthis act on reported Iranian requests to close the strait. Traffic and warships shift again, Houthi-linked groups gain cover and motherships push further east.

Consequence: piracy merges with the Red Sea war.

PUSHES TOWARD ESCALATION

- ▲ Houthi closure of Bab el-Mandeb
- ▲ Confirmed Houthi or Al-Shabaab operational role
- ▲ Large ransom payouts in October and November

PUSHES TOWARD DE-ESCALATION

- ▼ A durable Hormuz ceasefire that frees escorts
- ▼ Armed guards back aboard at-risk ships
- ▼ Sustained forcible recoveries by Puntland and federal forces

Bar length shows relative likelihood (qualitative ThreatRate assessment, not a probability).

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SPILLOVER

A Somali problem with global reach

Seafarers — CRITICAL

More than 60 held in late summer. Pirates killed five crew before a rescue: the first crew deaths in over a decade.

Gulf of Aden transits — CRITICAL

The busiest attack zone since May, on the route between Suez and Asia. Ships at anchor off Yemen are most exposed.

Shipping costs — HIGH

Piracy adds to war-risk premiums and Cape diversions that already cost about $1M in fuel per round trip.

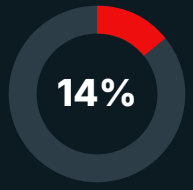
Somalia & Yemen — HIGH

Ransoms fund clan networks and possibly armed groups. The Puntland and federal rift complicates any response on land.

INTERNATIONAL RESPONSE

The EU is seeking more frigates for Aspides, while Kaja Kallas admits ships are queuing for escorts. Turkey's parliament extended its naval mandate in Somali waters. Puntland forces led the September rescues; Turkish commandos freed *Lutuf* in August. A Japanese aircraft and an Indian warship responded to *Glamor*.

A GLOBAL CHOKEPOINT



of world maritime trade passes Bab el-Mandeb and the Gulf of Aden, according to the Royal United Services Institute (RUSI), a London defence and security think tank.

10–14 days

added to Asia to Europe voyages diverted around the Cape of Good Hope

~$1M

extra fuel cost per diverted round trip

3,300 km

of Somali coastline, the longest in mainland Africa, with no functioning coast guard

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WHAT TO DO NOW

Guidance for ship operators, charterers and crews

AREA	RISK	GUIDANCE
Gulf of Aden	EXTREME	**Embark armed security** and apply Best Management Practices (BMP) Maritime Security in full: speed, freeboard, razor wire, lookouts and a tested citadel.
Yemeni & Somali anchorages	EXTREME	Avoid waiting or anchoring off Yemen and northern Somalia. *Eureka* was taken at anchor.
Somali Basin to 500 NM	HIGH	Mothership approaches have been reported at 500 NM. Keep maximum distance from the coast and maintain speed.
Reporting	HIGH	Register with the Maritime Security Centre Horn of Africa (MSCHOA) and report to UK Maritime Trade Operations (UKMTO) before entry. Do not assume a warship can reach you quickly.
K&R & sanctions	HIGH	Review K&R and war-risk cover. Ransoms involving Houthi or Al-Shabaab-linked groups carry legal risk.
Arabian Sea	ELEVATED	No 2026 hijackings confirmed, but state-on-state military risk near Hormuz dominates.

6
ships hijacked off Somalia and Yemen since late April 2026

500 NM
reported range of 2026 mothership approaches

Oct–Nov
peak-risk window before the northeast monsoon

UKMTO
report before entering and if attacked

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EARLY WARNING DASHBOARD

Indicators to monitor

Bab el-Mandeb
Houthi moves to close the strait or renewed attacks on Red Sea shipping.
▲ ESCALATION

Ransom payouts
Large payments for *Asana* or new captures, funding more groups and motherships.
▲ ESCALATION

Hostage violence
Further crew deaths during rescues or executions to force payment.
▲ ESCALATION

Armed group links
Confirmed Houthi or Al-Shabaab roles in specific hijackings.
▲ ESCALATION

Forcible recoveries
Puntland, federal and Turkish rescues: fewer ransoms, but higher crew risk.
▲ ▼ EITHER WAY

Naval return
A Hormuz ceasefire that releases escorts back to Atalanta and the Indian Navy.
▼ DE-ESCALATION

Somali piracy did not return only because conditions on land changed. It returned as naval cover thinned.

CONCLUSION

This is not a replay of 2011. Volumes are far lower, but attackers are better targeted, better armed and possibly linked to the Houthis and Al-Shabaab.

The most likely path is sustained high activity while the Iran war and the Red Sea crisis keep navies to the north. The most dangerous is a closure of Bab el-Mandeb that merges piracy with the wider conflict. Lasting suppression needs warships back in the Somali Basin and armed guards back aboard.

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