



GLOBAL RISK OUTLOOK 2025

Somali Piracy to Threaten Global Supply Chains in 2025

An analysis of the resurgence of Somali piracy in 2025 highlighting its disruption of global supply chains, fuelled by reduced anti-piracy patrols, regional instability, and economic pressures on local communities.

ISSUED: JAN 2025

FOREWORD FROM OUR SENIOR INTELLIGENCE ANALYST

As we reflect on another year of operations at Solace Global Risk, we are reminded of the importance of adaptability and collaboration in navigating the complexities of an ever-changing risk landscape. Throughout the past year, our mission to provide tailored, people-first solutions has remained steadfast, enabling our clients to operate with confidence, no matter the challenges they faced.

Our intelligence team has worked tirelessly to deliver insights that empower informed decision-making. From assisting routine business travellers to guiding operations in volatile environments, we've seen how a combination of expert human insight and innovative technology can provide clarity and reassurance, even in the most unpredictable circumstances.

This year's achievements are a testament to the partnerships we've built with clients across industries. Whether it's creating bespoke risk management plans, enhancing traveller tracking with intuitive technology, or providing on-the-ground expertise, our commitment has always been to go further - delivering excellence, reliability, and care every step of the way.



MARK OVERINGTON
SENIOR INTELLIGENCE ANALYST, SOLACE GLOBAL

This summary captures the highlights, but the full report goes further - offering detailed insights tailored to your specific needs. If you'd like to explore how an extended, bespoke report could support your decision-making, we're here to help.

Contact **Robert Aldous, Chief Customer Officer**, to explore how we can support you with intelligence tailored to your organisation's priorities.

The Review

2024: Piracy and Maritime Security Challenges in the Indian Ocean

After peaking at 237 incidents in 2011, Somali piracy declined, leading to the removal of the Indian Ocean's High-Risk Area in January 2023. However, Somali piracy has resurged since late 2023; the attempted hijacking of the Maltese-flagged, Bulgarian-owned bulk carrier MV RUEN (IMO: 9754903) in December 2023 marks the first successful boarding of a commercial vessel since 2017.

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2024 has seen large, well-organised, and well-armed pirate groups hijacking skiffs and dhows to travel deeper into the Indian Ocean and target larger vessels.

This has coincided with the Yemeni Houthi movement targeting commercial shipping with missiles, uncrewed aerial vehicles (UAVs), and uncrewed surface vehicles (USVs). Shipping companies face increased insurance, security, and ransom costs which must be weighed against the cost of travelling around southern Africa, potentially adding 6,000 nautical miles (NM) onto journeys.

2024 has seen large, well-organised, and well-armed pirate groups hijacking skiffs and dhows to travel deeper into the Indian Ocean and target larger vessels. Notably, Somali pirates hijacked the Bangladeshi-flagged bulk carrier MV ABDULLAH (IMO: 9745598) 600 NM off Somalia's Puntland region on 12 March, demanding a USD 5 million ransom for the vessel and its 23 crewmembers.

While the monsoon season kept piracy relatively quiet in the latter half of 2024, the International Maritime Bureau (IMB) reported eight piracy incidents, including three hijackings, in the first half of the year, up from zero hijacking incidents since 2017.

Multiple factors have fuelled this rise. The frequency of anti-piracy patrols off Somalia has diminished, especially after 2022, when the UN authorisation for foreign naval patrols lapsed. Resources have also shifted to countering the Houthi threat off the Yemeni coast; 130 Houthi-related incidents were recorded between 7 October 2023 and 20 September 2024, making them significantly more disruptive to shipping than piracy but also forcing more vessels to transit close to Somali waters.

Within Somalia, Mogadishu's recent fishing license distribution and inadequate regulatory measures have diminished earnings for local fishermen. As a result, some have turned to piracy to recover their economic losses.

Moreover, most piracy stems from Puntland, where economic opportunities are scarce, and

Somali security forces are combatting the Islamic State and Al-Shabaab. Puntland's corruption and disputes with Mogadishu over power and resource distribution further prevent security forces' enforcement of anti-piracy measures, aggravating the situation.



The Assessment

2025: Balancing Anti-Piracy Efforts with Regional Security Threats

With multiple unresolved drivers contributing to its resurgence, Somali piracy will likely continue in 2025. A key limiter of Somali piracy after 2011 was the multi-lateral anti-piracy naval operations conducted in Somali waters. Focus on the Houthis threat has prevented this in 2024, despite initiatives such as the European Union's Operation ASPIDES.

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Donald Trump will likely take a firmer stance against the Houthis, using sanctions and increased strikes to degrade their operational capability. However, in the short term, the Houthi movement will likely continue its operations against commercial shipping, distracting security forces and preventing significant multi-lateral operations tasked with combating piracy.

Mogadishu will likely continue efforts to curb illegal fishing and boost local economic opportunities. In March 2023, the government strengthened its maritime policing and updated the licensing for foreign vessels under the Fisheries Development and Management Act. In October 2024, the Badmaal project was launched to enhance fishing infrastructure.

In addition, Puntland has introduced marine conservation regulations, signalling stricter governance of its territory. While there is a realistic possibility these efforts will ease long-term pressure on local fishermen, Somali authorities will likely struggle to enforce its regulations.

Somali authorities are highly likely to remain fragmented in 2025. Militant insurgencies will likely continue to hinder Somali security forces and may even trigger a government collapse. The ongoing disruption from the insurgencies will likely further impede Mogadishu's ability to effectively govern its territory. Corruption will also likely remain a significant issue, hampering Mogadishu's ability to significantly reduce piracy in the Indian Ocean.


Interested in the Full Report? Let's Talk.


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