MARITIME RISK INTELLIGENCE REPORT

Weekly Maritime Security Risk Briefing

기준일: July 13, 2026 | Vol. 4 · 14개 분야 종합 | 분석관: Mare

1. Executive Summary (요약)

As of July 13, 2026, the Islamabad MOU has effectively collapsed. Between July 6 and July 12, Iran conducted four successive attacks on commercial vessels transiting the Strait of Hormuz. The United States designated these as MOU violations and launched three consecutive large-scale retaliatory strikes, hitting more than 300 Iranian military targets. President Trump declared at the NATO summit sidelines on July 9 that 'the Ceasefire is OVER' and threatened to 'hit them very hard.' JMIC immediately re-elevated the Hormuz threat rating to SEVERE.

Simultaneously, Saudi Arabia struck Houthi-controlled Sanaa International Airport, collapsing the years-long informal Saudi-Houthi truce. The Houthis upgraded their Bab el-Mandeb blockade threat from a possibility to a stated intention. Iranian President Pezeshkian warned that food and medicine would run out by late August, threatening to resign without a deal. US forces struck near the Bushehr nuclear power plant on July 9. Global maritime security has re-entered its worst phase of 2026, with a dual-chokepoint blockade scenario — covering over 45% of global seaborne oil supply — now a plausible near-term outcome.

2. Situation Overview (상황 개요)

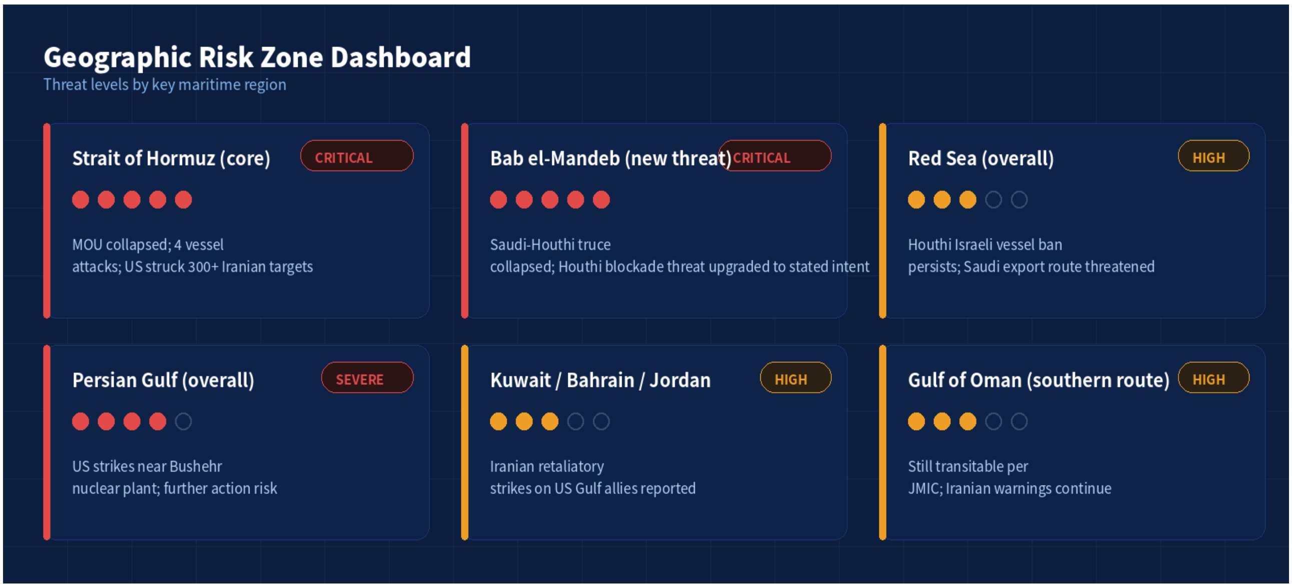
구분	내용
Confirmed Facts	4 Iranian commercial vessel attacks 7/6-7/12; US struck 300+ Iranian targets in 3 retaliatory rounds; Trump declared ceasefire 'OVER' on 7/9; Saudi strike on Sanaa airport ends Saudi-Houthi truce; JMIC re-elevated Hormuz to SEVERE
Reported Information	Iran privately claimed 'errant hardliners' behind attacks (US dismissed as implausible); Iran president threatened resignation without deal; US-Iran 7/11 talks attempted but failed; Houthis upgraded Bab el-Mandeb blockade warning
Analytical Judgment	The MOU's 60-day window has effectively collapsed. The pattern has shifted from 'limited exchanges + parallel diplomacy' to 'US offensive preemptive strikes + Iranian-ally escalation.' The Saudi-Houthi front reopening connects to new Bab el-Mandeb closure risk.
Information Gaps	Extent of Bushehr nuclear plant damage and radiation risk; whether Mojtaba Khamenei will choose continued war or negotiation return; exact Houthi Bab el-Mandeb blockade timeline

3. Geographic Risk Zone (지리적 위험 구역)

The Strait of Hormuz has returned as the epicenter of the crisis this week, with Iran's commercial vessel attacks and US retaliatory strikes escalating beyond the previous 'limited exchange' pattern into offensive operations. Bab el-Mandeb is emerging as a second blockade front following the Saudi-Houthi truce collapse.

해역	지난주 등급	금주 등급	변화

Strait of Hormuz (core)	ELEVATED	CRITICAL	MOU collapsed; 4 vessel attacks; US struck 300+ Iranian targets
Bab el-Mandeb (new threat)	HIGH	CRITICAL	Saudi-Houthi truce collapsed; Houthi blockade threat upgraded to stated intent
Red Sea (overall)	HIGH	HIGH	Houthi Israeli vessel ban persists; Saudi export route threatened
Persian Gulf (overall)	HIGH	SEVERE	US strikes near Bushehr nuclear plant; further action risk
Kuwait / Bahrain / Jordan	MODERATE	HIGH	Iranian retaliatory strikes on US Gulf allies reported
Gulf of Oman (southern route)	MODERATE	HIGH	Still transitable per JMIC; Iranian warnings continue



4. Key Threat Actors (핵심 위협 행위자)

행위자	의도	현재 상태
Iran IRGC / new leadership	Maintain Hormuz control, pressure US	4 vessel attacks; declared 'Hormuz opens only on Iranian terms'
United States CENTCOM	Force Hormuz open, degrade Iranian maritime denial	3 retaliatory rounds; 300+ targets hit (incl. 60+ small boats)
Houthis (Ansar Allah)	Iranian alliance; Bab el-Mandeb blockade threat	Post Saudi strike: vowed retaliation, upgraded blockade warning
Saudi Arabia	Counter Houthi threat, weaken Iranian proxies	Sanaa airport strike ends multi-year Saudi-Houthi de facto truce
Mojtaba Khamenei (new Supreme Leader)	Declared vengeance pledge; war continuation posture	Public statement vowing revenge; negotiation return uncertain

5. Affected Vessel Types (피해 취약 선종)

선종	위험도	주요 이유
LNG carriers (Hormuz transit)	★★★★★	Al Rekayyat (Qatari LNG) struck — highest risk category now
Crude tankers (Hormuz/Bab el-Mandeb)	★★★★★	Saudi tanker struck; dual blockade risk if Bab el-Mandeb closes
Container ships (off Iran-approved route)	★★★★★	Cyprus Prosperity struck after deviating — zero tolerance confirmed
Container/tankers (Israel-linked)	★★★★★	Houthi Red Sea targeting persists
Neutral-flag general cargo vessels	★★★★☆	Iranian-approved route mandatory; any deviation means attack risk

6. Threat Typology (위협 유형 분류)

Threat Type	Hormuz/Persian Gulf	Red Sea/Bab el-Mandeb
Missile/drone vessel strikes	Iran: 4+ confirmed (7/6-7/12)	Houthi threat intensifying
US retaliatory strikes	300+ Iranian targets hit (3 rounds)	Saudi: Sanaa airport struck
Blockade declaration	Iran re-declared closure; US denies via southern route	Houthi Bab el-Mandeb blockade stated intent
Sea mines	Off-route areas mined; Iranian warnings persist	Houthi mine-laying capability increasing
Nuclear plant proximity strike	US struck near Bushehr NPP on 7/9	Not applicable
Allied nation retaliatory attacks	Iran hit Bahrain, Kuwait, Jordan	Houthis threatening Saudi infrastructure

7. Shipping and Logistics Impact (해운 · 물류 영향)

Following the four vessel attacks from July 6-12, commercial traffic through Hormuz that had been recovering has fallen sharply again. JMIC's re-elevation to SEVERE has prompted several insurers to suspend new coverage for Hormuz transits. Brent crude rose to approximately $83/barrel by the morning of July 13. Iran's president warned food and medicine would run out by late August — signaling that Iran's internal humanitarian crisis may become a key diplomatic variable.

If the Bab el-Mandeb threat materializes into an actual closure, Saudi Arabia loses its alternative crude export route. A simultaneous Hormuz plus Bab el-Mandeb blockade would directly threaten over 45% of global seaborne oil supply simultaneously — an unprecedented energy crisis scenario with oil price forecasts exceeding $120/barrel.

8. Marine Insurance Impact (해상보험 영향)

구분	내용
Category	Detail

Hormuz war risk premium	JMIC SEVERE re-elevation triggers immediate sharp rise; some underwriters suspending new coverage
LNG carrier special risk	Al Rekayyat strike prompts immediate LNG carrier coverage tightening; some underwriters declining
Bab el-Mandeb premium	Escalating blockade threat driving simultaneous upward pressure alongside Red Sea rates
P&I; Club actions	Emergency board review of full invocation of 72-hour notice coverage cancellation clauses
Brent crude correlation	$83/barrel as of 7/13 morning; dual blockade scenario would push $120+
Iranian oil sanctions reinstatement	US Treasury revoked 6/21 Iran crude trading license — immediate sanctions violation risk for Iran-linked trades

9. Legal and Regulatory Considerations (법적 · 규제 고려사항)

Legality of striking near a nuclear facility: The US strike near Bushehr nuclear power plant raises serious issues under international humanitarian law's principle of civilian infrastructure protection. The IAEA has demanded an immediate investigation, and radiation release risk has triggered humanitarian law concerns.

Dual blockade declarations and legal force: With Iran re-declaring Hormuz closure while the US insists the southern route remains open, two contradictory legal claims now coexist. Attribution of liability for any damage becomes highly complex under these circumstances.

MOU collapse and downstream legal effects: Contracts and insurance policies premised on MOU implementation require immediate reassessment. US Treasury's reinstatement of Iran oil sanctions also resurrects immediate sanctions violation risk for previously licensed trades.

Saudi-Houthi hostilities and civilian shipping: Saudi strikes on Sanaa airport effectively elevate the Houthis from a non-state armed group to a de facto belligerent party, complicating the legal status of civilian vessels transiting Bab el-Mandeb in the event of a blockade.

⚠ 본 내용은 법률 자문이 아니며, 구체적 사안은 해사법 전문가의 검토가 필요합니다.

10. Risk Score (위험 점수)

위험 요소	점수	근거
Full Hormuz blockade recurrence	5 / 5	JMIC SEVERE; MOU collapsed; escalation trend
Bab el-Mandeb blockade execution	4 / 5	Saudi-Houthi truce ended; Houthis upgraded to stated intent
Full-scale US-Iran war resumption	4 / 5	Trump declared ceasefire 'OVER'; shifted to offensive strikes
Nuclear facility damage escalation	3 / 5	Bushehr proximity strike; radiation risk unconfirmed
Global energy crisis	5 / 5	Brent $83 rising; dual blockade pushes $120+
Iranian regime instability	3 / 5	President threatens resignation; new Supreme Leader intent unclear

종합 위험 점수: 4.5 / 5.0 | 위험 수준: CRITICAL (MOU collapse, US-Iran combat resumed, dual-chokepoint blockade imminent threat — highest 2026 risk level)

11. Scenario Outlook (시나리오 전망)

시나리오	확률	내용
Best Case	Low	Iranian moderates force return to talks; Oman mediates immediate ceasefire; commercial vessel attacks halt
Base Case	Medium	Limited exchanges continue; Iran-approved route maintains minimal traffic; Bab el-Mandeb stays at warning level
Worst Case	High	Simultaneous Hormuz and Bab el-Mandeb blockade; US strikes Iranian energy infrastructure; oil $120+; global supply shock

12. Recommended Mitigation Measures (권고 대응 조치)

대상	권고 조치
Vessel Owners / Operators	Suspend Hormuz transits immediately — JMIC SEVERE, 4 confirmed attacks on vessels Absolute prohibition on off-route transit — confirmed attack pattern for any route deviation Maintain 24/7 UKMTO/NAVCENT NCAGS contact; status update every 6 hours minimum
Charterers / Cargo Owners	Seek alternative routing for Hormuz-bound cargo immediately — UAE overland pipeline, direct Indian Ocean routing Prepare Cape alternative for Saudi crude cargo if Bab el-Mandeb closes
Marine Insurers / P&I; Clubs	Immediate full rate reassessment upon JMIC SEVERE re-elevation — LNG separate underwriting review Emergency board review of full 72-hour notice cancellation clause invocation
Crew Management Organizations	Develop immediate evacuation plans for crews aboard vessels transiting or en route to Persian Gulf / Red Sea Coordinate with CENTCOM for rescue support for crews on struck vessels
Government / Coast Guard	Immediate Korean vessel and crew census; issue urgent evacuation advisory Activate energy supply emergency plan — strategic reserve release consultation Activate 24/7 UKMTO emergency reporting channel; consult Korean naval deployment options

13. Confidence Level (신뢰도)

Confidence: High. Cross-verified across multiple primary sources including Al Jazeera (7/11), Reuters (7/11), Lloyd's List (7/12, JMIC SEVERE and 4th vessel strike), Bloomberg (7/7, Al Rekayyat), TWIZ (7/7, CENTCOM strike details), ABC News (7/13 live/MOU breakdown timeline), Fortune (7/12, battle overview), CNN (7/13 live), and CounterPunch (7/13, analytical). All key events of the week are confirmed across multiple independent sources as of July 13 morning.

14. Information Gaps (정보 공백)

• Extent of Bushehr nuclear plant damage and whether any radiation release has occurred (IAEA investigation pending)

• Whether Mojtaba Khamenei will choose continued military pressure or signal return to negotiations

• Specific Houthi timeline and trigger conditions for executing Bab el-Mandeb blockade

• Whether Iran's presidential resignation threat constitutes a real political shift or a negotiating tactic

• Status of South Korean, Japanese, and Chinese vessel 'friendly nation' designation under the Iranian transit system

• Risk to Korean refiners from the US Treasury reinstatement of Iranian oil sanctions on previously licensed trades

분석: Mare (비전통해양안보전략연구소)