

*The authors' views are their own and do not represent the official position of the Institute of Defence and Strategic Studies of the S. Rajaratnam School of International Studies, NTU. These commentaries may be reproduced with prior permission from RSIS and due recognition to the authors and RSIS. Please email to Editor IDSS Paper at [RSISPublications@ntu.edu.sg](mailto:RSISPublications@ntu.edu.sg).*

No. 007/2024 dated 24 January 2024

## Asia Needs to Be Ready for Long-Term Trouble for Red Sea Traffic

*John Bradford*

### SYNOPSIS

*In the last three months, the conflict in and around Yemen has escalated twice, once when the Houthis began attacking civilian shipping in earnest and then when the United States and United Kingdom began launching strikes against Houthi targets. **JOHN BRADFORD** observes that, because there is no sign that either side can deplete the other's capacity by military force, Asia should be prepared for maritime traffic to be disrupted until a long-elusive diplomatic solution can be found.*

### COMMENTARY

Since November 2023, shipping in the Red Sea has been under continual threat of attack by Houthi forces operating from Yemen. At least [16 ships have suffered direct strikes](#) and [hundreds of ships are rerouting](#) around Africa, adding a week or more to their transits. The cost of sending a container from Asia to Europe has tripled and manufacturing supply chains are already being impacted. These attacks represent both a new dimension to the long-standing conflict in Yemen and the expansion of the conflict between Israel and Palestinian groups. An international coalition emerged to protect shipping. Subsequently, the United States and United Kingdom struck Houthi targets in Yemen. The Anglo-American effort was an escalation designed to create opportunities to de-escalate the conflict, but so far that is not working. Houthi attacks continue and they have scored several hits in the last week. From here, there is no clear path to resolution, and Asia should be prepared for this link to the Mediterranean to remain disrupted for the foreseeable future.

Maritime watchers must first understand that the Houthis' military campaign began over a decade ago. Throughout that period, the Houthis have been tightening their

relationship with Iran and other members of the Iranian proxy group network. Iran has been [supplying the Houthis with missiles, drones](#) and other capabilities needed to target strikes both ashore and at sea. These systems have been used against the Houthis' Yemeni enemies as well as Saudi Arabia. In 2016, the Houthis attacked a group of US Navy ships. In that case, the USS *Mason* was able to defend the other ships in the group [by firing](#) SM-2 and Evolved SeaSparrow (ESSM) missile interceptors under the control of its Aegis combat system.

## Houthi Escalation

Shortly after the 27 October 2023 Israeli invasion of Gaza, the Houthis began expressing their solidarity with Israel's Palestinian targets by threatening international shipping related to Israel. On 19 November, they made good on those threats through a helicopter assault to seize the *Galaxy Leader*, a ship partially owned by an Israeli business and chartered by the Japanese company NYK Line. The ship's 25-member crew, mostly Southeast Asians, remain detained in Yemen despite [Japanese outreach to the Houthi leadership](#). The Houthi assault was a deliberate ploy to widen the Gaza conflict as well as draw attention to their capabilities. A [high-quality video](#) of the Houthi attack team boarding the vessel from their helicopter ensured the media coverage the group desired. Attacks on ships connected to dozens of countries followed. In December, three commercial vessels were struck on the same day.

The international community responded by organising naval defence for shipping. Most significantly, 18 nations (including Singapore) committed to Operation *Prosperity Guardian*, stood up under the stewardship of the US-led Combined Maritime Force headquartered in Bahrain. However, a purely defensive naval operation cannot adequately protect shipping. The relatively short ranges of guns aboard warships dictate that using bullets to protect commercial ships would require tightly packed convoys. Dozens of navy ships would be needed to protect the 22,000 vessels that transit the Suez Canal in a typical year. Area defence requires the use of missiles, but inventories are limited, and every shot fired comes with a [big price tag](#) for the firing navy. ESSMs cost around US\$1 million each and SM-2s about US\$2.5 million. Considering the quantity of Houthi weapons, firing such costly missiles would be unsustainable. Plus, no interceptor has perfect accuracy, so even firing multiple shots at each of the Houthis' missiles will not prevent one from eventually finding a target.

## US/UK Strikes

Lacking better options and under political pressure to act, the United States and United Kingdom escalated the conflict on [11 January by striking](#) at Houthi command and control nodes, munitions depots, launching systems, production facilities and air defence radar systems. In all, over 150 munitions were used against around 60 targets in more than 16 locations to deter and degrade Houthi attacks. Four more rounds of strikes have followed, but there is no sign that these have had the desired effects. Houthi attacks targeting both commercial ships and naval vessels have continued. While their capabilities may have been degraded, the Houthis have still been able to hit the US-owned [Gibraltar Eagle](#) and US-operated [Genco Picardy](#). Neither side is going to shoot its way back to the pre-November status quo and there is no sign that either of them will cease fire. On 21 January, [President Biden spoke to reporters](#) about the strikes: "Are they stopping the Houthis? No. Are they going to continue? Yes."



A missile being launched from a U.S. Navy vessel, prior to the 2024 Yemeni airstrikes. The United States and the United Kingdom recently launched airstrikes against Houthi forces in January 2024 in response to the Houthi attacks on Red Sea civilian shipping in November 2023. It is likely that maritime shipping will continue to be affected given the complex political forces surrounding the conflict. *Image from Wikimedia Commons.*

Another dimension of the US strategy involves cutting the routes used to supply the Houthis with weapons and their components. The US military's Central Command (CENTCOM) [reported](#) that an 11 January operation seized the components intended for Houthi medium-range ballistic and anti-ship cruise missiles from a dhow near Somalia, with two US Navy SEALs (Sea, Air and Land special operations force) being lost at sea during the operation. However, Western forces have been intercepting small boats laden with weapons for the Houthis for years to little effect. Ramping up such operations may squeeze Houthi capabilities, but Yemen's porous border and Houthi capacity to manufacture drones locally mean that we cannot expect the threat to be eliminated.

### **The Difficulty of a Diplomatic Solution**

Since Houthi capabilities are unlikely to be neutralised, shipping will only be safe if the group lose their will to attack. There are rumours that shipping companies have tried to pay "protection money" to the Houthis to ensure safe passage for their vessels, but corporate leaders deny these rumours. Such methods are unlikely to work because the Houthis' motives are political, not economic. Furthermore, the Houthis may not have the target discrimination capabilities needed to select specific targets while avoiding other nearby shipping. This speaks to a need for a political solution. But Houthi motivations are complex and interlinked with the Yemeni civil war, the Israeli-Palestine conflict and Iranian pugnacity. These are long-standing problems more likely to become worse rather than better. Diplomacy is the best means towards resolution, but there is no clear path to pursue.

**John BRADFORD** is an Adjunct Senior Fellow with the Maritime Security Programme, S. Rajaratnam School of International Studies.