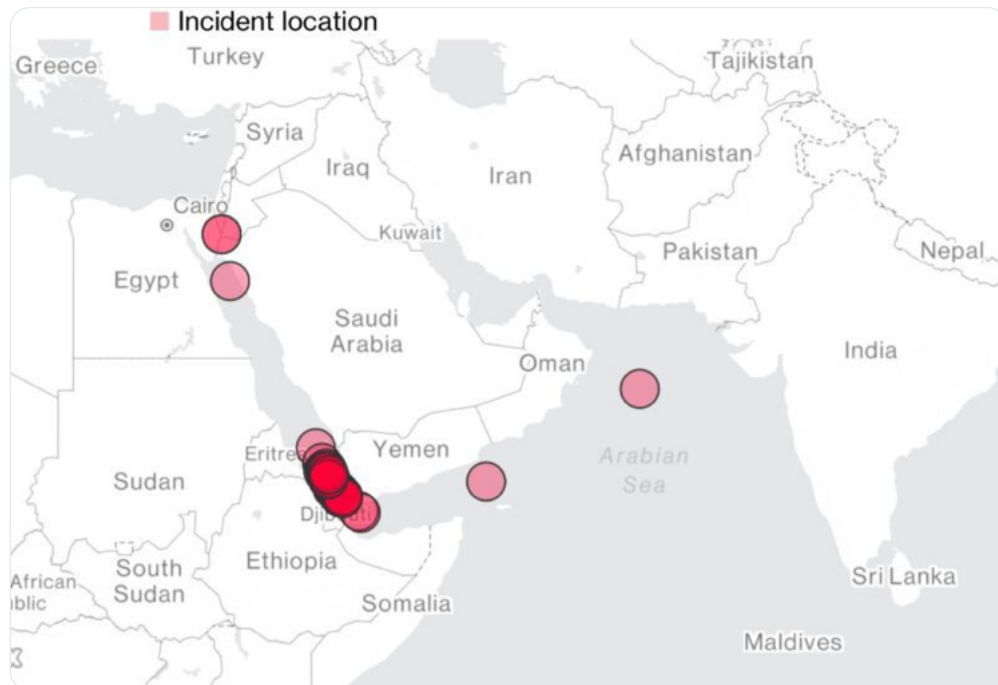




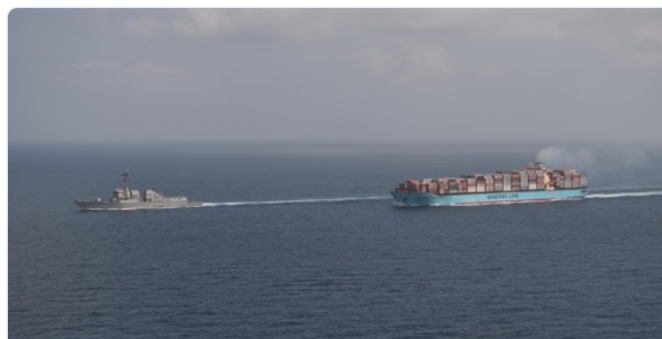
**Helena Cobban** @helenacobban

Dec 20, 2023 · 24 tweets · [helenacobban/status/1737503177979695130](https://twitter.com/helenacobban/status/1737503177979695130)

THREAD: around 10 days ago, @mouinrabbani commented that the #Houthis in #Yemen didn't even really need to \*hit\* any of the ships passing thru the Bab El Mandeb in order to have a huge effect on global trade...>



That map I used was of the ship-threatening incidents Nov. 18 thru Dec 18. Source: >



#### Operation Prosperity Guardian: Can The US-Lead Naval Force End Ho...

Explore the strategic intricacies of Operation Prosperity Guardian, led by US Secretary of Defense Lloyd Austin and a robust coalition, in combating Iranian-sponsored Houthi attacks in the Red Sea an...

<https://gcaptain.com/navy-operation-prosperity-guardian/>

I find gCaptain a good source of shipping news. Monday, they reported this: >

## Insurance Reappraised

The London-based Joint War Committee, which advises Lloyd's marine-insurance underwriters on risk, on Monday **expanded the portion** of the Red Sea that it considers to be part of the world's riskiest waters. That means the amount of time that ships need cover against war risks will increase. The cost of such cover has surged almost 10-fold since the attacks first began.

Three container ships came under attack in the space of about a day late last week, prompting owners including MSC Mediterranean Shipping Co. SA, A.P. Moller-Maersk, CMA CGM — the top three — to announce plans to stay away. On Monday, German container carrier Hapag-Lloyd AG said it was sending several ships around southern Africa instead of going through Suez. That will continue until the canal and the Red Sea are safe again, a spokesman said.

There are 46 container vessels that have diverted around the southern tip of Africa rather than using the Red Sea and a further 78 awaiting instructions, Ryan Petersen, the founder of logistics firm Flexport said on X.

Already rates to ship goods in containers from Asia to the Mediterranean are rising. According to Freightos.com, a booking and payments platform for international freight, the rate for that route through Suez as of Sunday was \$2,414 for a 40-foot container, up 62% since the end of November.

The Suez Canal has also emerged as a major route for the global LNG trade over the past two years, bolstered by Europe's appetite for the super-chilled fuel as the main replacement of piped Russian natural gas. Its importance has amplified this year as Asia-bound cargoes take longer routes amid the congestion on the Panama Canal. LNG vessels have also been rerouting, taking the longer and more expensive route via the Cape of Good Hope.

That post on their blog had other good info, too: >



### Global Trade Faces Turmoil as Houthi's Disrupt Red Sea Shipping

By Rachel Graham, Brendan Murray and Alex Longley (Bloomberg) —Shipping in the Red Sea is grinding to a halt with oil tankers idling and container vessels rerouting around Africa as...

<https://gCaptain.com/global-trade-faces-turmoil-as-houthi-disrupt-red-sea-shipping/>

The #Houthis, of course (real name Ansar Allah), are well known as feisty, mountain-based fighters who have fended off vicious (US-supported) assaults from Saudi Arabia and UAE

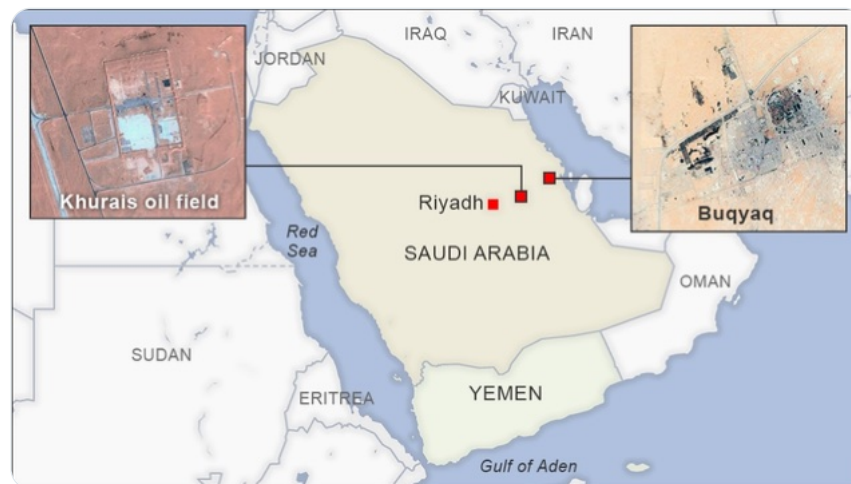
since 2015... >

& in Sept 2019 they launched v. smart drone attacks against key Saudi oil facilities: >



**Abqaiq-Khurais attack - Wikipedia**

[https://en.wikipedia.org/wiki/Abqaiq%E2%80%93Khurais\\_attack](https://en.wikipedia.org/wiki/Abqaiq%E2%80%93Khurais_attack)



The #Houthi leaders have vowed since late October that they will attack shipping heading to or from, or owned by, Israel so long as Israel maintains its mega-lethal siege of Gaza. >

This is one of the most notable (& noticeable!) acts of pro-Palestinian solidarity from anywhere in the Arab world. >

So on Monday, after a spate of Houthi attacks last week, US Sec of defense Lloyd Austin announced the launch of a US-led naval op called "Operation Prosperity Guardian" to defend against Houthi attacks on Red Sea shipping: >



#### **U.S. Launches 'Operation Prosperity Guardian' in Response to Houthi ...**

U.S. Secretary of Defense Lloyd Austin has formally announced the initiation of Operation Prosperity Guardian as a direct response to the increasing threats posed by Houthi forces in the Southern Red...

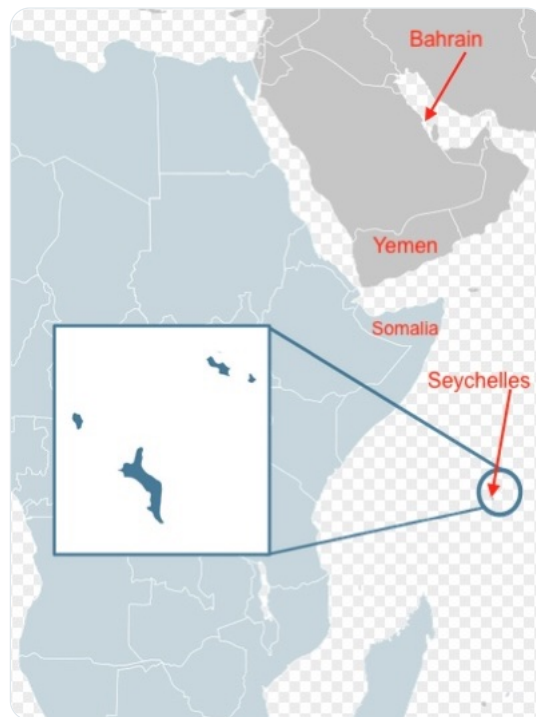
<https://gcaptain.com/us-launches-operation-prosperity-guardian-in-response-to-houthi-...>

OPG is meshed with a number of pre-existing, US-led "Combined Naval Task Forces" that have been operating all around the Arabian Peninsula for some years now, as part of the broader campaign to encircle & intimidate Iran >

... & also to counter "piracy" from Somalia (a failed state that has been chaotically dismantled by US military action over the past 25 years.) But anyway >

I was interested in the list of countries that Lloyd Austin has in his new, anti-Houthi coalition. It is: the U.S., United Kingdom, Bahrain, Canada, France, Italy, Netherlands, Norway, Seychelles, and Spain. Do you notice anything? >

What I see are 8 "Western" nations along with two (very tiny) others, neither located close to the Bab el-Mandeb or Red Sea: >



#Seychelles is actually \*south\* of the Equator, has a populatn of c. 100,000. #Bahrain is a small island, highly controlled by the US/UK, and HQ of the US Fifth Fleet. Also v. significant: >

Is that neither Saudi Arabia nor UAE (earlier, v. bitter & violent foes of the Houthis) are listed as part of OPG. Seems they don't want to be seen as supporting the "Western" attack on the Houthis' brave act of solidarity with #Palestine... >

Houthi official Mohammed Abdulsalam yesterday responded to Austin's announcement of OPG by saying: ""Our position will not change in the direction of the Palestinian issue, whether a naval alliance is established or not...Our position in support of Palestine and the Gaza Strip will remain until the end of the siege, the entry of food and medicine, and our support for the oppressed Palestinian people will remain continuous." >



**Yemen will target Israeli vessels despite US-led naval coalition: Official**  
Yemen's military efforts to support Gaza have created 'the most significant threat to global shipping in decades'

<https://new.thecradle.co/articles/yemen-will-target-israeli-vessels-despite-us-led-naval-...>

Meantime, US veteran Larry Johnson has written: "On paper it would appear that Yemen is outnumbered and seriously outgunned. A sure loser? Not so fast. The U.S. Navy, which constitutes the majority of the fleet sailing against Yemen, has some real vulnerabilities that will limit its actions..." > <https://sonar21.com/the-u-s-navy-is-unprepared-for-a-prolonged-war-with-yemen/>

Johnson's technical/operational explanation seems persuasive to me. He writes that the US Navy's real vulnerability is that it "is configured currently as a 'Forward-Based Navy' and is not an 'Expeditionary Navy'." >

He continues, thusly: >



So what? Each U.S. destroyer carries an [estimated 90 missiles](#) (perhaps a few more). Their primary mission is to protect the U.S. aircraft carrier they are shielding. What happens when Yemen fires 100 drones/rockets/missiles at a U.S. carrier? The U.S. destroyer, or multiple destroyers will fire their missiles to defeat the threat. Great. Mission accomplished! Only one little problem, as described in the preceding quote — the U.S. Navy got rid of the ship tenders, i.e. those vessels capable of resupplying destroyers with new missiles to replace the expended rounds. In order to reload, that destroyer must sail to the nearest friendly port where the U.S. has stockpiled missiles for resupply.

Got the picture? If the destroyer must sail away then the U.S. carrier must follow. It cannot just sit out in the ocean without its defensive screen of ships. The staying power of a U.S. fleet in a combat zone, like Yemen, is a function of how many missiles the Yemenis fire at the U.S. ships.

But the problems do not stop there. Each of the Aegis missiles, as I noted in my previous post, cost at least \$500,000 dollars. A retired U.S. DOD official told me today that the actual cost is \$2 million dollars. If Yemen opts to use drone swarms to saturate the battle space around a carrier, then the United States will fire very expensive missiles to destroy relatively inexpensive drones. This brings up another critical vulnerability — the U.S. only has a limited supply of these air defense missiles and does not have the industrial capability in place and operating to produce new ones rapidly to make up the deficit.

Getting the picture now? The U.S. Navy may find itself having to sail away without finishing the job of eliminating the drone/missile threat from Yemen. How do you think that will play in the rest of the world? The mighty Super Power having to retreat to rearm because it could not sustain intense combat operations. This is not classified information. It is published all over the internet. If I can figure this out then I am certain that U.S. adversaries, not just Yemen, realize they have a way to give the U.S. a very bloody nose in terms of damaged prestige.

And concludes with this: >



Here is the bottomline. The United States flotilla, along with its allies, can do some damage to Yemen but are unlikely to achieve a decisive victory. Yemen, for its part, can inflict some serious damage to some of the ships — maybe even sink one or two — and by doing so, score a moral victory that will fuel doubts about America's naval capabilities and staying power. Perhaps this explains why the U.S. has been so slow to respond to the attacks launched by Yemen.

Larry Johnson's analysis is pretty intriguing. But I don't see the US military as eager \*at all\* to get into a shooting war with the #Houthis. So while the military/operational aspects of any potential shooting war between the sides are intriguing, still... >

>I think that mainly @mouinrabbani was right: The geopolitical/geoeconomic effects of their feistiness are really the key thing to look at. And at that level, we can see huge effects: >



#### Shipping Industry Braces for Long Haul Without Key Trade Route

The global shipping industry is bracing for the prospect of living without its most important trade route for weeks.

<https://gcaptain.com/shipping-industry-braces-for-long-haul-without-key-trade-route/>

So shippers are sending vessels the **long way around** Africa, adding **\$1 million in costs** — and seven to 10 days of time — to each voyage. Oil prices are creeping higher.

The attacks have created potentially a worse — and more enduring — shipping emergency than the Suez Canal shutdown in 2021, when a ship **stuck for a week** snarled global trade for months. As vessels hauling everything from oil to grains to autos are forced to sail around Africa, the extra costs and delays pose risks to the global economy, just as inflation looked set to be cooling.

“It could be anything between, hopefully, days or weeks but of course there are also scenarios to think about when it takes longer,” Rolf Habben Jansen, chief executive of German container carrier Hapag-Lloyd, which has stopped sailing the Red Sea, told Bloomberg TV.

For captains and companies, even the possible fixes pose problems. Naval convoys shepherding ships through the perilous stretch of water could offer some protection, but it’s not straightforward.

@MouinRabbani So let us hope that these extra costs that companies and consumers worldwide will have to bear will add a lot to the pressure on Washington to (finally!) allow a serious #GazaCeasefire resolution to proceed. >

@MouinRabbani But I'm not holding my breath. The UN Security Council hasn't yet come to a vote on the current draft resolution (which is only for a 'suspension' of hostilities, not a full ceasefire.) Get updates, texts, etc here: (END OF THREAD.)



#### Security Council continues negotiations on Gaza resolution calling for...

Tuesday marked another intense day of diplomacy in the Security Council in New York, where negotiations continued to try and reach consensus on further unified action in response to the crisis in Gaz...

<https://news.un.org/en/story/2023/12/1144937>