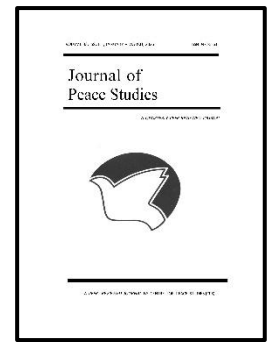


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The Emerging Red Sea Insecurities: Implications for Global Trade

Kelvin Benny*

Abstract

The Red Sea has emerged as one of the most strategically significant maritime regions in the contemporary global order, linking Asia, Africa, and Europe through critical sea lanes and the Suez Canal. This article examines the evolving geopolitical and economic significance of the Red Sea by tracing its historical role in global trade, the development of maritime security frameworks, and the recent transformation of its coastal landscape through large-scale economic initiatives. Particular attention is given to the emergence of new security challenges following the Israel– Hamas conflict of October 2023 and the subsequent involvement of the Houthis in Yemen. By employing area-denial tactics and targeting maritime traffic, the Houthis have disrupted shipping routes and challenged established Western-led security arrangements. The article argues that the convergence of economic investments and asymmetric security threats has heightened vulnerabilities in global supply chains, necessitating coordinated international responses to ensure maritime stability and uninterrupted trade flows.



Introduction

Geography has historically shaped the political and economic destinies of nations and regions, and few maritime spaces illustrate this reality as vividly as the Red Sea. Situated at the intersection of Asia, Africa, and Europe, the Red Sea¹

constitutes one of the world's most strategically significant waterways, serving as a critical maritime corridor linking the Mediterranean Sea to the Indian Ocean through the Suez Canal. Over the centuries, this narrow yet vital maritime route has facilitated the movement of goods, people, and cultures, thereby shaping trade and geopolitical

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interactions across continents. In the contemporary era, the Red Sea has acquired renewed importance due to its centrality in global supply chains, with a significant proportion of international trade and energy flows transiting through its waters.

In recent years, the political and economic geography of the Red Sea has undergone a significant transformation. Various ambitious development initiatives, particularly large-scale economic diversification projects along the Red Sea coastline undertaken by Saudi Arabia, have enhanced the region's strategic and commercial significance. However, these developments have coincided with the emergence of complex security challenges that threaten the stability of this maritime corridor.

The outbreak of the Israel–Hamas conflict in October 2023 and the subsequent involvement of the Houthi movement in Yemen introduced new dimensions of insecurity in the Red Sea region. Through the deployment of advanced missile systems, drones, and maritime interdiction tactics, the Houthis sought to disrupt critical sea lanes, raising concerns about the resilience of existing maritime security frameworks. These developments underscore the evolving nature of modern maritime conflict, in which non-state actors can

challenge established naval powers and alter global trade dynamics.

This article examines the evolving geopolitical and economic significance of the Red Sea, tracing the historical evolution of its maritime security architecture while assessing contemporary threats and their implications for global trade and regional stability.

I. Red Sea: Origins, Genesis, and Geographic Profile

Located between the Arabian Peninsula and the Horn of Africa, the Red Sea crisscrosses various geographical features, including plateaus, deserts, and fault lines. It is a waterbody that separates and, at the same time, links various civilisations along its coastline². Historically, the regions bordering the Red Sea and its strategic ports were controlled by regional powers such as the Roman and Persian Empires, either directly or indirectly through their allies. The trade patterns in the region were, for long periods, shaped by the demands of regional empires such as Rome and Egypt. The excavations and discoveries around a large number of ports in the region, particularly near the historic zone, termed the Erythrian Sea³, demonstrate the significance of the historic Red Sea

region. Its role as a maritime and trade conduit is also evident in historical documents such as the *“Periplus of the Erythrian Sea.”*

Geographically, the Red Sea stretches approximately 1,930 km from Suez in Egypt to the Strait of Bab-el-Mandeb⁴. It covers a surface area of nearly 1,70,000 square miles. Its width reaches 306 km at its widest point. No streams or rivers flow into the Red Sea. It connects the Mediterranean Sea to the Indian Ocean, thereby linking Asia, Africa and Europe. The region around the Red Sea is dotted with peninsulas, deserts, and many important port cities that connect diverse civilisations. In the north, it is bounded by the Sinai Peninsula and the Gulf of Aqaba and Suez⁵. In the south, it is bounded by the Gulf of Aden. The countries bordering the Red Sea include Egypt, Jordan, Israel, Saudi Arabia, Sudan, Yemen, and Eritrea⁶.

II. Maritime and Strategic Importance of the Red Sea

The importance of the Red Sea lies primarily in its geography, and more specifically in its centrality in connecting the three major continents of Asia, Africa, and Europe via the Suez Canal. During the era of geographical discoveries and the subsequent European colonisation of

Asia beginning in the 16th century, maritime trade used the route circumnavigating Africa through the Cape of Good Hope. This was a long and circuitous route, and yet it still proved profitable for European empires such as the Portuguese, Dutch, French, and British, as they colonised various parts of Asia. Subsequently, the British Empire, which would eventually become the largest imperial power, developed an interest in constructing a new canal. The Suez Canal connecting Suez to Port Said was designed to provide an alternative to the long-established Cape of Good Hope route. The Canal was constructed during the period 1859–1869, finally opened in 1869, and was supported by the Khedive rulers of Egypt, who governed with considerable autonomy from the Ottoman Empire.

The First Concession⁷ that facilitated the construction of the Suez Canal was granted to Ferdinand de Lesseps on 30 November 1854, followed by a Second Concession⁸ issued on 5 January 1856. On 5 December 1858, the Universal Company of the Maritime Canal of Suez was established with a capital of 200 million francs (8 million Egyptian pounds), divided into 4,00,000 shares priced at 500 francs each. While the British and French governments initially refused to purchase their allocated shares, the

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Egyptian government ultimately held roughly half of the company's total shares. The entire engineering process took nearly a decade and concluded on 18 August 1869. The cost overrun in canal excavation rose to 433 million francs, which was nearly double the initial estimate⁹. The inauguration ceremony, which marked the emergence of a major artery of global trade, took place on 17 November 1869 and was attended by Khedive Ismail of Egypt, Empress Eugénie of France, Emperor Franz Joseph I of Austria-Hungary and Frederick William, Crown Prince of Prussia, among others.

Following the inauguration of the Canal, and with the observable increase in the number of ships using it, European powers became increasingly interested in acquiring financial control over it. This interest was closely linked to their imperial ambitions during the period. Both the British and the French controlled large colonial empires across Asia and Australia, which generated immense profits and resources. As such, the control of the Suez Canal became strategically important to them as it provided a new and efficient shortcut to their prized imperial possessions in Asia. On 15 February 1875, British Prime Minister Benjamin Disraeli purchased approximately 44 per cent of the Canal's shares from the Egyptian

government. While France controlled 56 per cent of the company's shares, the Egyptian government also granted another important waiver to the company¹⁰. Thus, within a few years after the Canal's construction, which had involved the loss of many Egyptian workers' lives, the financial control of the Canal was acquired by European imperial powers.

The subsequent political developments in Egypt led to upheavals such as the Urabi Revolt in 1882, which prompted the British Empire to deploy troops and take direct control of the Suez Canal zone. The European colonial powers described it as necessary to ensure freedom of navigation through the Canal. On 29 October 1888, the Convention of Constantinople created an international agreement involving Austria, France, Hungary, Spain, Italy, Britain, Russia, the Netherlands, and the Ottoman Empire, establishing the Suez Canal as an international maritime waterway guaranteeing free navigation for all ships, in peace and war, regardless of flag¹¹. Since then, the Canal has remained an essential artery of global trade and commerce. According to available data for 2022, approximately 56 ships pass through the Suez Canal each day¹², accounting for 12 per cent of global trade¹³ and 30 per cent of global container traffic annually, thereby

demonstrating its role in the global economy. For Egypt, the Canal generates approximately US\$ 9 billion in annual revenue and is thus a constant source of revenue for the government¹⁴.

III. Changing Face of Red Sea Coastline: Mega Projects that Are Too Big to Fail

The political geography and economic prospects of the Red Sea have undergone significant transformation in the recent decades. Take, for instance, the economic projects of Saudi Arabia, whose economic diversification and modernisation have Red Sea at their core. Since 2016, several significant projects worth billions of dollars have been implemented by the Saudi Kingdom under its Vision 2030 along its coastline, spanning fields such as tourism, urban development, manufacturing, and logistics. Riyadh aims to leverage the Red Sea's geographical and natural features for both strategic and economic potential; strategic, due to its proximity to three major continents, with implications for global logistics; and economic, particularly tourism, with the potential to attract millions of tourists to the kingdom to supplement its religious tourism. Some of the important projects being undertaken by Saudi Arabia on or near the Red Sea coast include Neom, Amaala, Red Sea Global, and Jeddah Central.

Neom is being designed as a futuristic city in the Tabuk Province, near the Red Sea coast, covering an area of approximately 26.5 sq km and with a coastline extending to nearly 468 km v . It also includes 41 islands in the Red Sea and is intended to be fully powered by renewable energy. Within Neom, there are many other projects, including¹⁵, The Line (vertical linear city), Oxagon (industrial city), Sindalah (luxury island destination), and Trojena (mountain destination), among others.

Amaala is a luxury tourism project located along the Red Sea coast in northwestern Saudi Arabia. With a surface area of approximately 4000 sq. kms, it is envisioned as the world's first integrated family wellness destination¹⁶. Designed to operate entirely on renewable energy with a zero carbon footprint, it aims to provide activities across various realms, including sports, arts, marine experiences, and leisure tourism. Located within the Prince Mohammed bin Salman Natural Reserve, it occupies only about 5 per cent of the designated area, leaving the remaining 95 per cent untouched. By 2027, Amaala is expected to welcome tourists with nearly 3,000 hotel rooms and 943 luxury residential villas. It consists of several sub-projects, including Triple Bay, Yacht Club, and Marine Life Institute¹⁷.

Another project of significance is Red Sea Global, which utilises the stunning scenery of the Red Sea, including its numerous islands and coral reefs. At full capacity, it will consist of approximately 8,000 rooms across nearly 50 hotels and around 1,000 additional residential properties¹⁸. It includes several sub-projects such as Red Sea International Airport, The Red Sea Nursery, Turtle Bay, Ummahat Island, Southern Dunes, Shebara Island, Shura Island and Desert Rock¹⁹.

On the other hand, Jeddah Central is an ambitious project designed to transform Jeddah City and significantly boost its economic potential²⁰. As a coastal city on the Red Sea, Jeddah has a long history of cultural interaction and maritime trade. Once completed, the project will cover approximately 5.7 sq. km and comprise nearly 17,000 residential units. It includes several sub-projects²¹, including Museums, Coral Farms, Sports Stadium, Oceanarium and Opera House.

IV. Houthi Intervention and the Militarization of Red Sea Trade Routes

The 7 October 2023 Hamas attack in Israel, which led to over two years of Israel's war against Gaza, fundamentally altered the regional geopolitical landscape. As the

Abraham Accords of 2020, which established diplomatic relations between several Arab states, such as the UAE, and Israel, and the growing trend toward Arab normalisation of Israel emerged as the dominant theme of regional politics for several years, the Hamas attack froze many of these developments, if not completely reversed²². The blitzkrieg-style attacks by Hamas militants, breaking free from the Gaza enclave which had remained in effective Israeli siege for decades, shocked the global community with over 1200 Israelis, both civilians and soldiers, were killed and several hundred were taken hostage. Israel responded with its military might, launching a full-scale war in Gaza, which, as per various estimates, killed over 70,000, including a large number of children and women²³, between 2023 and October 2025, when a ceasefire came into force even as Israel has continued its military strikes occasionally.

The two-year war, however, did not remain restricted to Gaza and expanded to Lebanon and Iran as well as Yemen²⁴. The entry of Yemen's Houthis Shia militia²⁵ effectively turned the Red Sea into a battleground. Houthis, who are Zaydi Shias, have evolved into a battle-hardened force due to the prolonged conflict in Yemen,²⁶ having fought Saudi-backed Yemeni government

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after taking over major parts of the country in 2014, including the capital Sanaa, three years after the country's long-term authoritarian president, Ali Abdullah Saleh, was ousted through Arab Uprising protests of 2011. Having received sustained support from Iran²⁷, including financial and military, the group has transformed itself into a powerful non-state actor controlling large swathes of territory in Yemen, including major population centres, effectively running a government of its own. Its military capabilities have expanded considerably over the last decade, with its arsenal²⁸ now including ballistic and anti-ship missiles, drones, and other advanced weapon systems.

Given their proximity to the Red Sea, the Bab-el-Mandeb Strait, and the Gulf of Aden, through which critical Sea Lines of Communication (SLOCs) pass, the Houthis did not take long to leverage their strategic position. The movement entered the war within two weeks in support of Hamas and Gaza by firing drones and missiles at Israel on 19 October 2023. It began targeting ships, including commercial merchant vessels and, later, even United States naval assets, using their expanding arsenal²⁹, with the stated objective of disrupting global maritime navigation along this critical sea lane. These intimidation tactics produced

disproportionate consequences by disrupting global trade and commerce, leading to increased insurance premiums and elevated shipping costs³⁰.

Thus, the long-standing maritime security framework that had prevailed in the Red Sea region since the Arab-Israeli wars once again stood challenged by a determined non-state actor. The Houthis attacked multiple vessels and, in certain instances, even captured ships, thereby implementing an effective area-denial strategy³¹ in parts of the Red Sea. The group also possess a record of targeting countries such as Saudi Arabia and the United Arab Emirates, including attacks on oil infrastructure that temporarily disrupted refinery operations³² and affected the global oil market. During the entire period of Israel's War on Gaza, the Houthis launched repeated attacks against Israel using weapons such as ballistic missiles³³.

In response, global powers such as the United States and its allies formed coalitions, including Operation Prosperity Guardian³⁴ and Operation Aspides³⁵, to conduct maritime patrols and safeguard navigation routes. Additional operations such as Operation Poseidon Archer³⁶ and Operation Rough Rider³⁷ targeted Houthi positions. However, despite the considerable financial and

military costs involved, these operations did not fully deter Houthi activities³⁸. Encouraged by sustained support from external partners such as Iran and benefiting from broader geopolitical alignments involving powers such as China, Russia, and North Korea, along with their expanding networks across the Red Sea and the Horn of Africa region, the Houthis have emerged as a potent disruptive force in the Red Sea maritime domain.

V. Evolution of the Security System around the Red Sea

a). Pan-Arabism and Gamal Abdel Nasser

The European imperial control over the Suez Canal was widely viewed as a violation of the Egyptian state's sovereignty from its inception. This control evolved from initial financial dominance to later political and military domination over the Canal and its immediate surrounding zone. While the Khedives were largely indifferent or powerless in the face of such hegemonic European influence, opposition was simmering within the Egyptian public. Its outburst was visible during the Urabi Revolt³⁹ in 1882, which was ultimately suppressed by European powers. Later, this opposition found

expression through political parties and nationalist leaders in Egypt. The principal figure who forcefully articulated this demand was none other than Gamal Abdel Nasser, the leader of Egypt and a prominent propounder of Arab nationalism⁴⁰.

His actions regarding the Suez Canal culminated in a military confrontation known as the "Suez War"⁴¹. Although this war ended in military setbacks for Egypt, it resulted in a major political victory for Nasser, and his stature rose to unprecedented levels among Arab populations, transforming him into a Pan-Arab hero⁴². His nationalisation of the Suez Canal in 1956 transferred control from European powers to the Egyptian state. Subsequently, numerous engineering works were undertaken for the maintenance and upgradation of the Canal's capacity⁴³. As a result, the depth of the Canal was increased to approximately 13.5 meters, and its width was expanded from 22 meters to 42 meters, thereby increasing the permitted draft from approximately 2.4 feet to nearly 35 feet.

b) Suez Canal and the West

Since the colonial period, Western countries have maintained significant political and military influence in the region. During the colonial era and for many years after

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Egypt's decolonisation, such influence remained pronounced. As the post-Second World War global order promoted decolonisation, British control in the eastern regions gradually diminished, as reflected in the decline of British authority over the Suez Canal zone. Despite the military intervention of European powers during the Suez War, control of the canal zone ultimately reverted to Egypt, thereby reducing direct European dominance in the region.

The broader political climate of decolonisation weakened Western political hegemony over the Red Sea region, particularly as several countries gained independence, including Sudan, Ethiopia, Yemen, and Somalia. The next major contest for influence in the region occurred during the Cold War, when both the United States and the Soviet Union sought to expand their strategic presence. The United States retained its influence through regional partners such as Ethiopia and Saudi Arabia. However, the most significant challenge to freedom of navigation through the Red Sea and the Suez Canal emerged during the Arab-Israeli conflicts. Following the 1967 war, the Canal was closed for several years and was reopened only in 1975⁴⁴. Israel subsequently secured freedom of navigation through the Canal after signing a peace agreement with Egypt in 1979.

The post-Cold War era witnessed the emergence of new challenges in the region. The political geography of the region changed due to the creation of new states, such as Eritrea from Ethiopia, and to developments including the unification of Yemen, alongside increasing instability in countries such as Sudan and Somalia. New security concerns also emerged, including piracy and terrorism in the wider maritime region. The United States' military influence in the region has been reinforced through the establishment of multiple military installations. The United States has also formed alliances, such as the Combined Maritime Forces (CMF), headquartered in Bahraint and co-located with its Navy's Fifth Fleet,⁴⁵ which has been tasked with operational responsibility in the region.

The involvement of Western and extra-regional powers, such as China, has increased following incidents such as the rise of piracy in the Gulf of Aden region. Regional states such as Djibouti, which shares a Red Sea coastline, have capitalised on this growing strategic importance by leasing large tracts of land for the establishment of military and naval bases for several countries, including the United States, the United Kingdom, China, France, and Italy. The geopolitical map of the Red Sea witnessed another significant shift

when Egypt ceded the islands of Sanafir⁴⁶ and Tiran to Saudi Arabia in 2016, thereby altering the maritime strategic balance in the northern Red Sea.

c) Iran in Challenging the Western-Led Security System in the Red Sea

Located in Southwest Asia, Iran possesses an extensive coastline along the Indian Ocean⁴⁷, as well as a coastline along the Caspian Sea. Iran's foreign policy orientation in the wider region experienced a major transformation after the 1979 revolution. During the Shah's regime, Iran was regarded as one of the principal pillars of United States strategy in the region,⁴⁸ being heavily armed by Washington to act as a regional security guarantor.

The revolution and its subsequent transformation into an Islamic revolution, with the consolidation of Shia clerical rule under Ayatollah Ruhollah Khomeini, fundamentally altered the direction of Iran's foreign and defence policies, reorienting them toward challenging Western influence and opposing pro-Western Gulf regimes. This shift was manifested through growing Iranian support for groups, including militant ones⁴⁹, primarily those with Shia ideological orientations besides Sunni Palestinians. Over the decades, this network emerged as what has

been referred to as the "3H"— Hamas, Hezbollah, and the Houthis. The Houthis hold particular strategic significance because they control territories along the Red Sea coast.

Iran, supported by its domestic military-industrial capabilities and regional proxy networks, has created a significant challenge to the Western-led security framework in the region. The production and transportation of oil remain critical functions for the wider region, with the capacity to influence global economic stability. Recognising this strategic leverage, Iran has repeatedly threatened to block the Strait of Hormuz⁵⁰, a crucial maritime chokepoint through which large volumes of global oil transit. To expand the scope of such threats, Iran has also supported its Houthi allies in creating disruptions in another strategically vital maritime chokepoint, that is the Bab-el-Mandeb Strait⁵¹, which plays an equally critical role in global trade and energy flows.

Thus, both directly and indirectly, Iran has demonstrated its ability to trigger crises and disruptions in the critical arteries of global trade and commerce. In doing so, it has frequently employed what is commonly described as Grey Zone warfare tactics⁵². This strategy operates below the threshold of direct conventional conflict while

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Houthi Missiles⁵⁵

Name	Type	Range (kms)	Payload (kg)
Asif	Anti-Ship Ballistic	400	500
Burkan-1	Ballistic	800	500
Burkan-2	Ballistic	1000	250
Burkan-3	Ballistic	1200	250
Hatem	Ballistic	1450	500
Hatem-2	Ballistic	NA	NA
Karar	Ballistic	300	500
Mohit	Anti-Ship Ballistic	300	165
Tankeel	Ballistic	500	NA
Toofan	Ballistic	1950	800
Al Mandab-1	Anti-Ship Cruise	40	165
Quds-4	Cruise	2000	NA
Rubezh	Anti-Ship Cruise	80	NA
Sayyad	Anti-Ship Cruise	300	200

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simultaneously generating substantial disruption and strategic uncertainty.

d) How the Houthis Threat is Redefining the Red Sea Security System

The Houthis entered the broader conflict framework as a means of

Yemen is located over two thousand kilometres away from the Israel–Palestine conflict zone, the advanced arsenal of the Houthis and their expanding warfare capabilities enabled their actions to resonate across distant regions. Since the group controls extensive Yemeni territory⁵³, particularly in the western

Houthi Drones⁵⁶

Name	Mission	Flight Distance (km)	Weapons Load (kg)
Qasef-1	Suicide	200	45
Qasef-2K	Suicide	200	30
Samad-2	Suicide	1500	18
Samad-3	Suicide	1800	18
Sammad-4	Combat	2500	45
Waid-1	Suicide	900	20
Waid-2	Suicide	2500	50

expressing solidarity with Gaza, as Israeli military actions killed an overwhelming number of Palestinian civilians, including women and children. Although

and northern regions bordering the Red Sea coastline, it has been able to dominate several strategic ports. Their primary effectiveness in shaping global political and

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economic dynamics, however, lies in their offensive capabilities to disrupt the critical maritime arteries of global trade in the Gulf of Aden and the Babel-Mandeb Strait. The advanced arsenal⁵⁴ possessed by the Houthis includes ballistic missiles, anti-ship missiles, and unmanned aerial systems (drones), which have enabled them to target vessels transiting through the broader maritime region, posing sustained challenges to maritime security and global commerce. In several instances, commercial vessels were compelled to reroute via the Cape of Good Hope, which increased both transit time and logistical costs while negating the time-saving advantages of the Suez Canal.

What really distinguishes the military strategy of the Houthis, though, is their area-denial strategy⁵⁷ in the wider Red Sea region, which has effectively transformed parts of the maritime space into what may be described as a “no-go” zone on the global maritime map. It created new and complex challenges in the Red Sea region, particularly for the United States and allied Western powers, recalling the era of Suez Canal disruption during the Nasserite period. The entire Western-led security architecture, including the presence of the United States Fifth Naval Fleet, as well as numerous military installations across the Gulf

region like Bahrain based fifth fleet and Central Command’s forward base in Qatar (at Al-Udeid), appeared practically constrained⁵⁸ in addressing the persistent Houthi challenge.

In the discipline of International Relations, power is often defined as the ability to produce desired outcomes. In this context, the United States, despite its great power status, appeared challenged by what was once considered a relatively limited militia operating from Yemen. This situation highlighted limitations in Washington’s power projection in the wider Red Sea region, as successive naval missions⁵⁹ failed to deter Houthi attacks or significantly degrade their operational capabilities, further underscoring the complexity of this challenge. The US was forced to enter into dialogue with Houthis and eventually agreed to a ceasefire, brokered by Oman in May 2025, following which the group stopped targeting US and its allied-flagged ships.

These developments affected Egypt’s economic revenues⁶⁰, which rely heavily on canal transit fees, while disrupting commercial activity at Israeli ports, such as Eilat, during this period. The cumulative economic impact of these disruptions illustrates how regional security instability can rapidly translate into

broader economic consequences for multiple stakeholders across the international system.

VI. Conclusion

The contemporary political, economic, and security challenges affecting the Red Sea region illustrate that the global system is undergoing a significant transition. Long-established and carefully constructed security architectures are increasingly being challenged by non-state actors employing Grey Zone warfare tactics. The Red Sea region, which historically connects multiple civilisations and major economic centres, continues to be of immense importance to global trade and commerce.

The ongoing conflict in Gaza and its broader regional spillover have extended into the Red Sea maritime domain, with the Houthis joining the conflict as an indirect supporter of Hamas in Gaza. Through the use of advanced armaments, the Houthis have implemented an area-denial strategy in parts of the Red Sea, thereby challenging the Western-led security framework in the region.

While the United States and its allies have responded through military strikes on Houthi positions and escort operations to safeguard maritime traffic, these measures have not fully eliminated Houthi operational capabilities. As a result, attacks on maritime shipping continue to occur, sustaining instability in one of the world's most critical maritime corridors.

This evolving situation underscores the need for more coordinated global responses to the crisis in both the short and long term. Immediate measures may involve enhanced maritime security coordination and technological countermeasures, while long-term stability will likely depend on political solutions to enduring regional conflicts, including those involving Yemen and the broader Israel–Palestine dispute. The future of the Red Sea as a secure and reliable maritime artery will depend on the collective capacity of regional and global actors to address both the military and political dimensions of the crisis in an integrated and sustainable manner. ■

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