

SITUATION UPDATE, 09-09-2026

The US-Iran confrontation has undergone a significant renewed escalation during the previous 24 hours, with commercial shipping increasingly incorporated into the retaliatory cycle.

On 8 September, US CENTCOM destroyed five Iranian or IRGC-linked tankers following two attempted Iranian ballistic-missile attacks against a US Navy warship. Four vessels were struck in the Gulf of Oman, while the Iran-



flagged VLCC DERYA was attacked near Kharg Island. Crews were reportedly instructed to abandon the vessels before the strikes. The latest action means US forces have now targeted eight Iranian tankers within several days, indicating that Washington is deliberately extending military pressure onto the maritime infrastructure supporting Iranian oil exports.

Iran subsequently launched ballistic missiles against US forces at Al Azraq in Jordan; Jordan reported intercepting 18 of 20 missiles with no casualties. The IRGC separately claimed attacks against two US

vessels and eight tankers in the Strait of Hormuz, as well as another ten commercial vessels attempting to enter what Tehran describes as a prohibited area. These maritime claims remain largely unverified.

The deterioration is already influencing shipping behaviour. Preliminary analysis undertaken by Vanguard recorded only eight vessel transits through Hormuz on 8 September (comprising 5 northbound/entering the Persian Gulf and 3 southbound/exiting towards the Gulf of Oman); compared with an average of 11 vessels between 2 - 8 September. Reporting also indicates increasing numbers of vessels conducting AIS-dark transits, meaning actual traffic is difficult to determine precisely.

IRGC WARNING – BAHRAIN & KUWAIT

"In light of the atrocities committed by the terrorist US army in targeting several tankers of the Islamic Republic of Iran, we warn all tanker crews in the Kuwaiti and Bahraini ports, which host these terrorists and are partners in their atrocities, to immediately abandon their vessels, whether at anchor or at the ports, because they will be targeted."

Of greater immediate significance to commercial operators, late on 8 September the IRGC Navy issued an explicit warning instructing tanker crews in Bahraini and Kuwaiti ports and anchorages to abandon their vessels, stating that the ships themselves would be targeted in retaliation for US attacks on Iranian tankers. Tehran explicitly linked the threat to the presence of US forces in both countries.

Vanguard assesses the warning as credible enough to require immediate operational consideration, although an attack is not assessed as inevitable.

Three factors elevate its significance.

1. First, the threat is unusually explicit. Iran has previously threatened commercial shipping associated with adversarial states, but the present statement identifies vessel type, location and intended action: tankers at berth or anchor in Bahrain and Kuwait. It therefore goes materially beyond rhetorical warnings concerning general regional escalation.
2. Second, the threat is consistent with demonstrated Iranian behaviour. Iran has repeatedly targeted US military facilities in Bahrain and Kuwait during the conflict, including attacks against facilities associated with the US Fifth Fleet in Bahrain and US installations in Kuwait. The current warning therefore concerns countries against which Iran has already demonstrated both willingness and capability to employ missiles and UAVs.
3. Third, Tehran's targeting rationale appears to be widening. Until now, commercial maritime targeting has predominantly centred on vessels transiting the Strait, vessels perceived as US/Israeli-linked, or shipping disregarding Iranian routing instructions. The latest statement instead applies a form of collective attribution: commercial tankers may be targeted not because of their individual ownership, flag or activity, but because they are located within a state hosting US forces. This materially widens the potential target set and reduces the relevance of traditional vessel-specific risk indicators.

VANGUARD'S ASSESSMENT

The threat is assessed as more acute in Bahrain than Kuwait, although exposure is elevated in both.

Bahrain represents the more concerning operating environment because US Naval Forces Central Command and the US Fifth Fleet are permanently headquartered there, with US naval port operations centred around Mina Salman. Commercial maritime infrastructure therefore sits within a comparatively small and heavily militarised coastal environment. A missile or UAV attack intended against either US facilities or explicitly threatened tankers consequently presents both direct-targeting and collateral-damage exposure.

In Kuwait, US military infrastructure is more geographically dispersed and much of it is separated from the principal tanker terminals. This reduces – but does not remove – the possibility of accidental or collateral maritime damage. The IRGC's wording nevertheless indicates that commercial tankers themselves may now be considered retaliatory targets, meaning physical separation from US facilities cannot presently be considered sufficient mitigation.

Iran also has a strong incentive to use the threat coercively without necessarily conducting a large-scale attack. Forcing crews to evacuate, delaying loadings, increasing war-risk premiums and discouraging port calls would impose economic costs on US partners while avoiding the consequences of mass casualties or catastrophic damage to Gulf energy infrastructure. The warning should therefore be understood as both a credible kinetic threat and an instrument of psychological/economic warfare.

The most likely near-term scenario is continued threatening rhetoric accompanied by selective Iranian missile/UAV activity against US or US-associated targets. However, following the direct US destruction of Iranian tankers, the probability of Iran attempting a demonstrative strike against a commercial tanker or tanker anchorage has materially increased. Any further US attacks against Iranian oil shipping would raise that probability again.

OPERATIONAL OUTLOOK

LOW	MODERATE	SUBSTANTIAL	HIGH	EXTREME
<i>An incident is unlikely</i>	<i>An incident is possible</i>	<i>An incident is credible</i>	<i>An incident is likely</i>	<i>An incident is highly likely</i>

Vanguard therefore assesses a **SUBSTANTIAL** near-term risk to tankers alongside or at anchor in Bahrain and Kuwait. This does not indicate that an attack is assessed as more likely than not; rather, the combination of explicit Iranian intent, demonstrated capability, and the potentially severe consequences of an attack warrants heightened precautions for at least the next 24-48 hours. Non-essential tanker calls should be reconsidered and time alongside minimised where operationally possible. Vessels already in port or anchorage should maintain readiness to sail, restrict unnecessary open-deck activity, identify protected internal muster locations and closely follow flag, port and naval-security instructions.

The threat should not presently be extrapolated automatically to all UAE, Qatari, Saudi or Omani ports. However, the underlying development is strategically significant: Iran is increasingly demonstrating that retaliation for attacks on its maritime economy may be directed against the commercial maritime interests of states facilitating US operations, rather than solely against US assets themselves. Further US-Iran escalation could therefore rapidly broaden the geographic threat to Gulf ports.

SPECIAL ANALYSIS, PERSIAN GULF

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Vanguard Technology

The Vanguard Tech team brings together over 30 years of experience within commercial shipping and the maritime domain. We share a passion for providing a new digital approach – the 'Digital Ocean' to how the commercial shipping industry understands and then deals with maritime risk in its many guises.

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