

## Maritime Intelligence Brief

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## Escalating Campaign Against Russia's Shadow Fleet

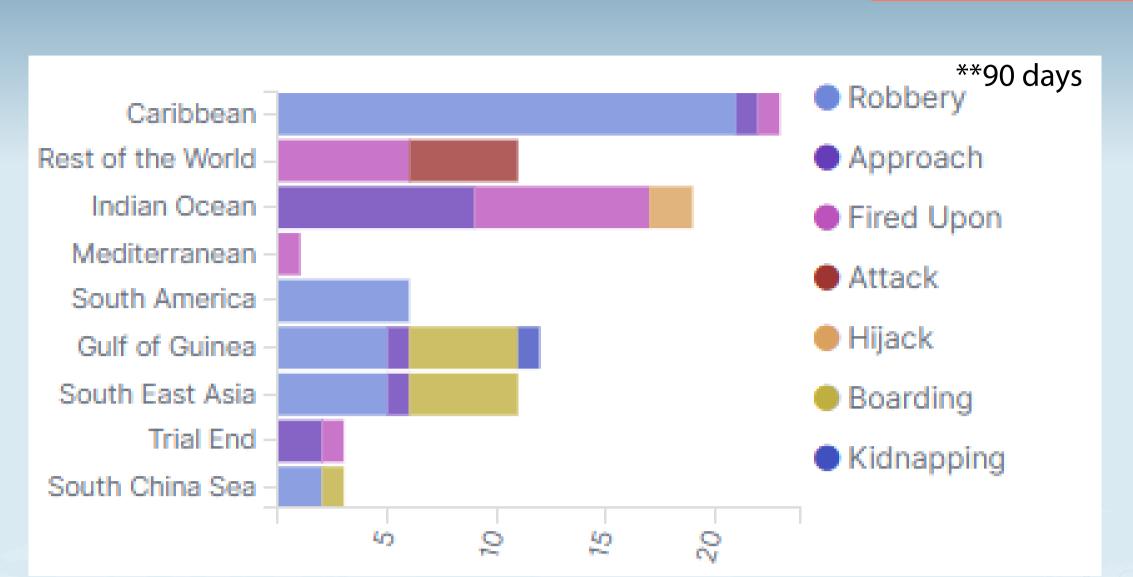
On 28 November 2025, Ukrainian forces employed Sea Baby unmanned surface vehicles (USVs) to conduct strikes against two tankers believed to be part of Russia's shadow fleet in the Black Sea. The vessels targeted were KAIROS and VIRAT, both empty and inbound to the Russian oil terminal at Novorossiysk. KAIROS, approaching from Egypt, was struck approximately 28 nautical miles off the Turkish coast, sustaining an explosion and fire that disabled the ship and required extensive intervention by Turkish rescue vessels KURTARMA-12 and NENE HATUN. VIRAT was hit near the engine room but remained stable. These deliberate attacks, executed in close proximity to the Turkish Straits, signal Ukraine's entry into a new phase of maritime warfare aimed at directly interdicting shadow fleet tankers to deter further traffic to Russian ports and impose an effective de facto blockade on Black Sea oil exports.

The Black Sea strikes occurred in close temporal proximity to a separate sabotage incident involving the Panamanian-flagged tanker MERSIN off Dakar, Senegal. On 27 November 2025, while at anchor, the MERSIN was struck by four external explosions consistent with the use of limpet mines attached to the hull on both sides. The vessel, which had loaded approximately 35,000 tons of gas oil at Russia's Taman terminal in August 2025, suffered seawater ingress into the engine room but recorded no injuries or pollution. Its AIS signal ceased on 25 November 2025, during an extended stationary period typical of shadow-fleet vessels seeking to obscure sanctioned cargo transfers.

Taken together, the USV strikes in the Black Sea on 28 November 2025 and the limpet-mine sabotage of MERSIN off Senegal on 27 November 2025 reveal a sophisticated, multi-domain campaign designed to disrupt Russia's sanctioned oil trade. By neutralizing tankers both in transit through contested waters and at distant anchorages, these operations not only interrupt specific shipments but also generate significant deterrence, discouraging even non-sanctioned insurers, shipowners, and crews from engaging with Russian oil cargoes. The result is mounting economic pressure on Moscow's war chest at a time when Ukraine continues parallel strikes against refineries and power infrastructure.

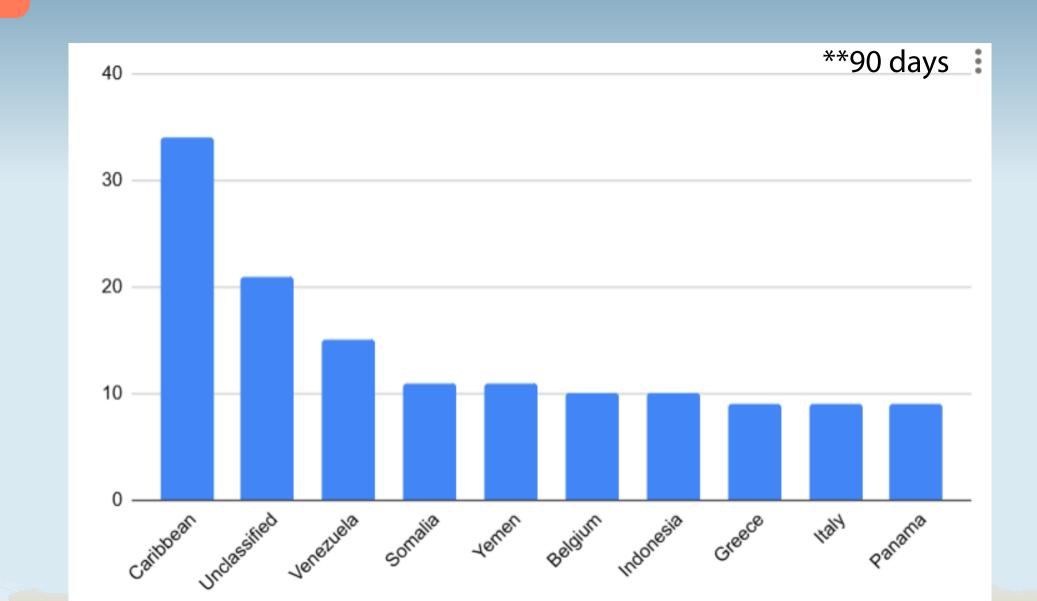
The limpet-mine attack on MERSIN stands out for its technical complexity. Placing multiple charges on both sides of a hull while a vessel is at anchor requires specialized military training for underwater attachment divers or submersibles—capabilities far beyond civilian actors and typically reserved for state-sponsored special forces or elite naval units. While no entity has claimed responsibility, the incident's alignment with Ukraine's Black Sea strikes fuels speculation of direct Kyiv orchestration, potentially augmented by EU nation-state involvement through intelligence sharing, logistical support, or proxy mercenaries drawn from NATO-aligned forces.

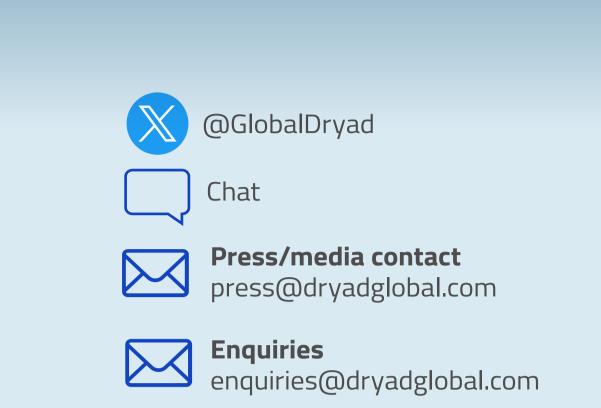
International reactions have so far been restrained. Turkey formally protested the Black Sea strikes inside its Exclusive Economic Zone, citing risks to navigation and the environment, while Kazakhstan objected to the collateral threat to its own exports through the Novorossiysk CPC terminal. Given Ankara's role as both mediator and key military partner to Kyiv, Ukraine is likely to respect Turkish sensitivities and shift future USV attacks into Russia's own EEZ. Should the campaign intensify, Russia will face a stark choice: leave the shadow fleet unprotected or order its depleted and largely port-bound Black Sea Fleet to sea for escort duties—an option that would expose its remaining frigates and corvettes to devastating, Western intelligence-aided Ukrainian drone swarms.



Cartography: Steven Bernard, Senior Visual Journalist at the Financial Times

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