

INDO-PACIFIC INSIGHT SERIES

The Alternative Sealine – The Southwestern Indian Ocean and Australian Security

Dr. Alexander Lee and Ms. Eloise Kelly
Perth USAsia Centre

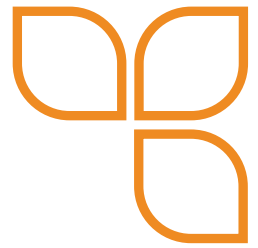
Volume 27, February 2026



KEY MESSAGES

- The Red Sea, responsible for twenty-two per cent of global container traffic, has proven highly vulnerable to disruption. Houthi attacks beginning in late 2023 forced a significant shift of maritime traffic to the Cape of Good Hope route, directly affecting Australia's trade with Europe.
- Despite this historic reliance on the Cape of Good Hope route, Australian strategic policy has not adequately addressed the Southwestern Indian Ocean. The region receives minimal attention in strategic guidance, leaving Australia unprepared for disruptions to this critical trade artery.
- China is rapidly expanding influence with the Southwestern Indian Ocean states of South Africa, Mozambique, and Madagascar. All three have increased cooperation with China while South Africa's relations with the United States deteriorate. Beijing's growing defence partnerships position it to shape access to the Cape of Good Hope route during future crises.
- Low-cost, high-impact opportunities exist for Australian engagement. Options include inviting regional states to the Defence Cooperation Program and Indo-Pacific Endeavour, and bolstering the substantial relationships Australia already enjoys with regional states through regional organisations like the Indian Ocean Rim Association.





1 INTRODUCTION

Australia's already challenging strategic environment is threatened by increased disruptions to sea lines of communication (SLOC). Protecting Australia's SLOCs is a priority task for Australia's defence strategy. The areas of acute interest for its strategic policy include the Pacific Ocean, Southeast Asia, and the Northeast Indian Ocean.¹ However, disruptions to shipping through the Suez Canal and wider Red Sea area, typically responsible for 22 per cent of all global container traffic, has meant that the Cape of Good Hope has returned to strategic relevance.²

The disruption of one of the major arteries of global trade, the Red Sea, is consequential for Australia and its partner countries. Recent events have highlighted this. The accidental running aground of the Ever Given container ship for six days in 2021 caused significant economic damage. Similarly, the Red Sea crisis, triggered by the Houthis – a militant Zaydi Shiite group controlling substantial territory in Yemen and conducting rocket and drone attacks on commercial shipping since 2023 – profoundly highlights the vulnerability of global shipping routes as they currently stand.

The potential for long term disruption of the Red Sea by the Houthis, or a more sophisticated military in the event of a regional Middle Eastern or Horn of Africa conflict, reinforces the need to understand the implications of such a reality. In March 2024, almost eight million metric tons of trade passed around the Cape of Good Hope daily, eight times more than the volume that passed through the Panama Canal in the same month.³ Such volume underscores the strategic importance of the southwest Indian Ocean, with states such as South Africa, Madagascar, Mozambique, and Mauritius becoming important to Australian and global economic security. This report examines the importance of Australia's SLOCs and the strategic importance of the Southwestern Indian Ocean.



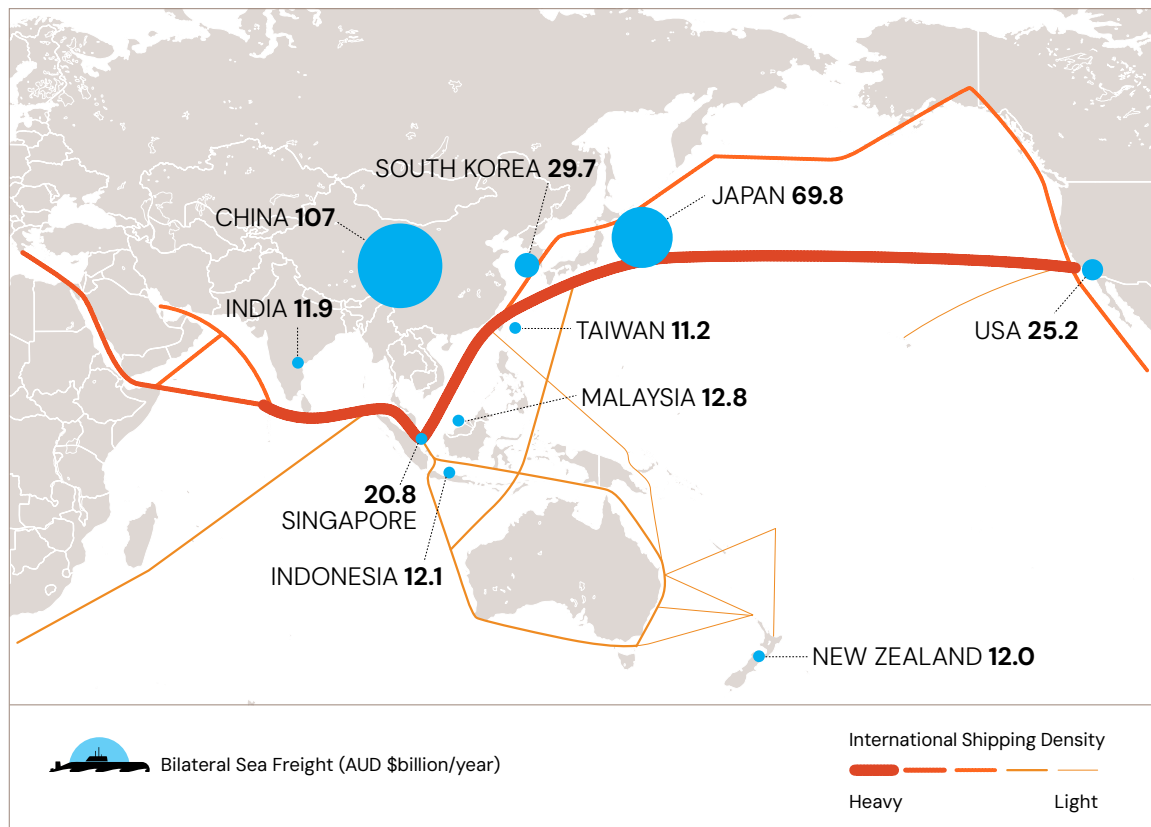
Cargo ship transiting Suez canal



2 AUSTRALIA'S SEA LINES OF COMMUNICATION

Australia is extremely reliant on maritime trade. It is the fifth largest user of shipping services globally and its significant exports of metals, energy, and food go primarily to Asia (see Figure 1).⁴ The Indonesian Straits, the Straits of Malacca, and the South China Sea are all rightly understood to be the most critical for Australian trade and economic security. However, Australia's trade and connectivity with economic and strategic partners in Europe depend on Red Sea trade.⁵ This shipping lane remains important to Australia and may increase in salience as Australian trade with Europe grows, while efforts to reduce overreliance on trade with China continue.

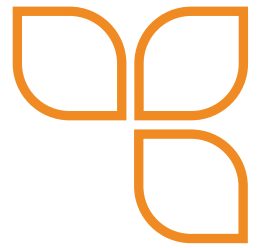
Figure 1: Sea Freight: Australia's Top Ten Trading Partners



Source: Department of Defence, 2016 Defence White Paper (Canberra: Commonwealth of Australia, 2016), 70.

Southeast Asian trade routes are most important to Australia and have been the focus of government attention. The Australian government has understood this since federation and Defence White Papers have articulated its importance since 1976. The 1976 Defence White Paper referenced that Australia has a close interest in the "passage through the seas and straits of the archipelagic regions to our north".⁶ A statement that rings as true now as it did fifty years ago. What has changed since then is that now half of Australian exports are going to China, almost one third of imports come from China, and these sea lines are under geopolitical pressure.⁷

Conflict between China and any Southeast Asian state would inevitably compromise the South China Sea as a reliable trade route. The potential for a war or blockade in the Taiwan Strait would likewise drastically affect trade routes to North Asia. Other threats to these trade routes include natural disasters, piracy in areas like the Straits of Malacca, and the unlikely but possible risk of internal disorder or conflict in littoral states. The Yemeni Houthis have demonstrated the asymmetric possibilities of disrupting shipping with relatively primitive weapons. Although unlikely, a non-state actor in Southeast Asia may seek to replicate this strategy in the future.



The need to diversify trade partners and reduce reliance on these sea lanes is clear, if difficult to accomplish.

Australian trade with Europe, reliant on the Suez Canal, demonstrates this vulnerability – and is a case study of sea line disruption in general. Currently, 14 per cent of Australian goods imports come from the European Union.⁸ Advanced industrial and medical equipment is a high proportion of Australian imports from Europe and disruptions to such trade would have deleterious consequences.⁹ 70 per cent of Australia’s medicament imports, and more than 20 per cent of pharmaceutical products, medical instruments, and civil engineering equipment rely on the Red Sea routes. Exports are less affected, however. More than half of Australian seed oil exports and approximately 15 per cent of gold and barley exports use this route.¹⁰ Australia’s 2023 free trade agreement with the United Kingdom, and the potential for a free trade agreement to be signed with the European Union, will only increase the volume of Australian goods using these trade routes.

For the global economy, the risk is even more acute. In normal circumstances, about 15 per cent of all global trade transits the Suez Canal. Annually, this represents one trillion US dollars’ worth of goods, comparable to the entire gross domestic product of states like Saudi Arabia or Switzerland.¹¹ The International Transport Forum noted in 2024 that if the region becomes more unstable, the supply of raw materials for manufacturing will be severely affected, trade goods will increase in cost, and added costs will create inflationary pressure.¹²

Thus, Australia – and both friendly and unfriendly great powers – have a strong interest in the Red Sea trade line and its alternatives.

3 REDRAWING TRADE ROUTES

Of all global trade routes, it is the Red Sea connection that is under the most pressure. The South China Sea, Panama Canal, Strait of Hormuz, and other strategic waterways face geopolitical and climate-related challenges; however, the Red Sea route is actively being interfered with and faces threats from a myriad of actors, both non-state and state. Already, the Cape of Good Hope is becoming an increasingly more utilised trade route to avoid the Red Sea.

Box 1: Key threats facing Red Sea trade

Suez Canal Blockages	The Suez Canal has been periodically blocked due to geopolitical conflict, for example for eight years (1967–1975) after the Six-Day War. Cargo ships and oil tankers have also run aground blocking the canal.
Regional Instability	Red Sea adjacent states like Yemen, Sudan, Eritrea and Somalia are or have been engaged in recent civil or inter-state wars which has created a fragmented and volatile security environment.
Houthi Attacks	The Houthis, a major faction in Yemen’s civil war, have used anti-ship missiles, drones, and naval mines to attack commercial shipping in the Red Sea since late 2023.
State Interference	Iranian support for the Houthis has facilitated their anti-shipping campaigns. China’s first overseas military base was established in Djibouti, and Russia has proposed building a base on the Red Sea. These developments increase risks to shipping in a crisis.
Piracy	Piracy in the Red Sea and the adjoining Gulf of Aden threatens global trade by endangering ships along a critical maritime chokepoint, disrupting supply chains, and increasing security risks for commercial vessels.



The maritime corridor from the Suez Canal through the Red Sea and the Bab-el-Mandeb into the Gulf of Aden has been under significant pressure over the past five years. Ships running aground and blocking the Suez have been a periodic problem in the Suez Canal, however, the four-hundred-metre-long Ever Given blocked the canal for almost one week from 23 to 29 March 2021. The cost of this blockage and the subsequent supply chain disruptions was estimated to be up to ten billion American dollars.¹³ Long stretches of the Suez Canal remain one-way and thus vulnerable to this kind of blockage.

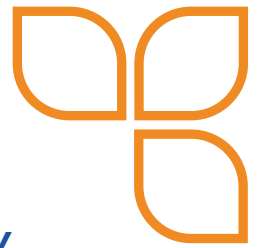
In the Red Sea, the Houthis began attacks on commercial shipping vessels from November 2023 as part of a broader campaign of missile and drone strikes against Israel and its backers. These attacks followed the 7 October 2023 Hamas attack on Israel and subsequent Gaza War. The Houthi attacks have been calibrated, avoiding tanker ships most commonly carrying Russian or Qatari petroleum products.¹⁴ A United States led coalition, including Australian participation, launched attacks against the Houthis from December 2023 until May 2025 in an attempt to ensure freedom of navigation of commercial shipping vessels.¹⁵ Nonetheless, Houthi attacks have continued throughout 2025. Restoring trade volumes through the Red Sea could be a multi-year process even in a perfect scenario of no more disruption.¹⁶

The Houthis have demonstrated the vulnerability of Red Sea shipping to unsophisticated attacks. Considering other Red Sea adjacent states, like Sudan, are in the midst of active civil wars, the threat of non-state actors interfering with shipping remains salient. Further compounding these uncertainties, Russia appears to be moving forward with plans to build a naval base in Sudan and has improved relationships with Eritrea. Russian interest in the region has increased considerably, owing to their newfound dependence on the Red Sea as an oil transit waterway.¹⁷

South of the Red Sea, the Gulf of Aden has long been vulnerable to piracy emanating from Somalia. Houthi attacks have opened the door to a resurgence of piracy operations, which had declined markedly throughout the 2010s. This has added even more complexity and pressure on shipping in this region.¹⁸

In the face of such challenges, there has already been considerable redrawing of trade routes.

After Houthi attacks began, shipping via the Cape of Good Hope increased 130 per cent.¹⁹ Redirecting shipping around the Cape of Good Hope adds between one to two weeks in transit time and increases costs by 20 to 40 per cent.²⁰ This increases shipping emissions, and leads to port congestion and supply chain disruptions.²¹ Land routes to connect Mediterranean and Persian Gulf ports have been proposed to avoid the Red Sea.²² However, constructing such a link would take time and come with its own risks. For now, the only sea route between Europe and Asia that avoids the Red Sea goes around Africa.



4 THE CAPE OF GOOD HOPE AND AUSTRALIAN SECURITY

The Southwestern Indian Ocean has historically been of the greatest importance to Australian trade and security. It served as a vital link to Britain and has been the only safe route in times of conflict in the Mediterranean and on the Sinai Peninsula.

From colonisation to the opening of the Suez Canal in 1869, Australia's primary economic and security lifeline to Britain ran via the Cape of Good Hope. Even after the Suez Canal's completion, the importance of the region to Australian security was well understood and led to the first Australian government lobbying London to expand British control over islands in the region. Specifically, the Australian government requested London buy the subantarctic Kerguelen Islands from France to reduce the risk of maritime interdiction of trade routes to Australia.²³ Further, the first military forces of a federated Australia utilised the Cape route for their deployment across the Indian Ocean to South Africa in the Second Boer War.

In modern times, the Cape of Good Hope route has been periodically important to Australian security. In both World Wars, the British understood the necessity of keeping the Suez Canal outside of enemy hands and invested considerably in its defence. Nonetheless, Italian control of parts of the Mediterranean in the Second World War saw the route around Africa become Australia's connection to its European allies. From 1956 to 1957 and again from 1967 to 1975, the Suez Canal was closed due to regional conflicts, with significant consequences for global trade. The period from the mid-1970s to the early 2020s represented a period of stability in the Red Sea, leading to complacency about the possibilities of that sealine being cut and the Cape of Good Hope route returning to prominence.

As the Red Sea becomes an unreliable trade route, Australian strategic policy must reflect this change.

To date, the Red Sea's importance and persistent security threats facing the region have not been reflected sufficiently in Australian strategic policy documents. The 2017 Department of Foreign Affairs and Trade White Paper defined the Indo-Pacific as only ranging from 'the eastern Indian Ocean'.²⁴ The 2024 National Security Strategy noted that 'Defence must focus its international engagement on maintaining regional stability in the Pacific, Southeast Asia, and the Northeast Indian Ocean'.²⁵ Despite the growing importance of the Cape of Good Hope as one of the most transited global sea lanes, therefore, policy frameworks have yet to recognise the Southwestern Indian Ocean as a vital strategic theatre for Australia.²⁶

5 THE SOUTHWESTERN INDIAN OCEAN AS A STRATEGIC THEATRE

The Southwestern Indian Ocean has not been a site of significant strategic competition since the Cold War. Amid intensifying geopolitical and geo-economic competition, however, key states adjacent to this maritime theatre such as South Africa, Mozambique, Madagascar, and Mauritius are growing in strategic importance.²⁷

Regional players are ill-prepared to handle the increased volume of shipping through their waterways. Limited naval capacity, port infrastructure and maritime domain awareness systems have created security gaps and invite external power involvement. China has the necessary expertise to ameliorate many of these concerns and works with all Southwestern Indian Ocean littoral states through the Belt and Road Initiative.



South Africa's most recent – although now outdated – Defence Review from 2015 noted that the South African economy is essentially an 'island' dependent on maritime, not landbound, trade.²⁸ However, the volume of trade being routed to South Africa since the Red Sea Crisis has been so quick that it has led to serious congestion at its ports.²⁹ Significant investment into improving port infrastructure has been announced, but will take time to be completed and will require foreign capital and expertise.³⁰

China is aggressively expanding its influence across the key states of the Southwestern Indian Ocean.

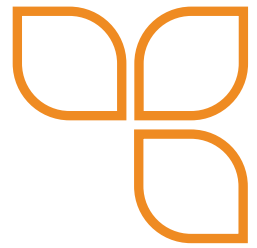
China is well positioned to work with South Africa, all the more so due to the radically deteriorating relations between South Africa and the United States under the Trump administration.³¹ In March 2025, South African ambassador to Washington, Ebrahim Rasool, was expelled.³² The American Ambassador-designate to South Africa, Brent Bozell III, has been sharply critical of South African foreign and domestic policy.³³ South Africa, already fostering closer relations with China as a member of BRICS group,³⁴ has increased military cooperation with China, including military exercises.³⁵ Despite the strong historical ties linking South Africa and Australia, Pretoria's worsening relationship with Washington gives strategic advantage to China in the most important Southwestern Indian Ocean state.

The trend of growing Chinese influence is repeated in Mozambique and Madagascar. In 2024 China conducted counter-terrorism drills with Tanzania and Mozambique.³⁶ Joint naval drills with a counter-piracy emphasis were hailed by Chinese media as reflecting the improvement in China-Africa relations.³⁷ Likewise in 2024, China and Madagascar elevated their ties to a comprehensive strategic cooperative partnership, signalling Beijing's ambitions for closer relations with Antananarivo.³⁸ Both Mozambique and Madagascar have deep water ports that would become more strategically relevant if international trade flows were directed towards the Southwestern Indian Ocean more permanently.

The strategic environment is more complex than just growing Chinese influence when it comes to the smaller islands of the region.

Mauritius' role in particular is changing. Since 2021 India has been developing a military facility on the outlying Agaléga islands.³⁹ Mauritius' negotiations with the United Kingdom will likely see a transfer of sovereignty of the British Indian Ocean Territory to Mauritius in a deal that has been endorsed by the United States. Owing to the existence of the United States' Naval Support Facility on Diego Garcia, this will increase the geopolitical significance of Mauritius and strengthen the Washington-Mauritius relationship.⁴⁰

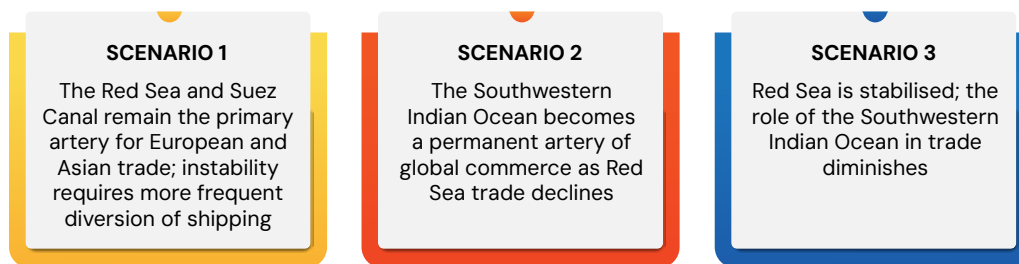
Other stakeholders have been engaged to varying degrees. France continues to maintain considerable influence in the region with a collection of overseas territories in the region, the most important being Réunion with almost one million residents. However, France has active territorial disputes with Mauritius and Madagascar.⁴¹ Australia holds a territorial stake in the region through its sovereignty over the remote Heard and McDonald Islands. However, its engagement in this area has not been seen through a strategic lens. For example, the 2016 Defence White Paper referenced the islands in the context of fisheries and resource protection, not as a crucial part of global trade strategy.⁴²



6 FUTURE SCENARIOS

The Southwestern Indian Ocean region is at a crossroads. Three scenarios looking out from 2025 to 2030 will be presented here (Box 2) – one likely scenario and two unlikely but plausible scenarios. Australia must be aware of developments in the region and be pro-active rather than taken by surprise if it does become an enduring hub of global trade.

Box 2: Future scenarios for Southwestern Indian Ocean trade



The most likely scenario is that the Red Sea and Suez Canal remain the primary artery for European and Asian trade. However, instability in the Middle East and the Horn of Africa will require more frequent diversion of shipping around the Cape of Good Hope. The Yemeni Civil War remains in a stalemate, and it seems unlikely that the Houthis will be defeated in the short term. Thus, the Houthis will continue to have the power to affect shipping. The Arab–Israeli conflict, Iran–Israeli conflict, and the Sudanese Civil War all present risks to Red Sea shipping.

A less likely scenario sees the Southwestern Indian Ocean become a permanent centre of global commerce. This depends on an unlikely but possible decline of Red Sea trade. An expanded campaign by the Houthis could see the Red Sea being closed or mostly closed for long stretches of time. A regional war, or one or more groups of states adjacent to the Red Sea intentionally closing the sea is also a non-negligible risk. Already, insurance premiums for transiting the Red Sea have increased the cost of using this route and conflict could make it unprofitable in a constant disruption scenario.⁴³

Another unlikely scenario would be regional stabilisation. How this could be achieved is speculative and beyond the scope of this report. However, an expanded Abraham Accords and an end to the Arab Israeli conflict could placate the Houthis, or they could be militarily defeated in the Yemeni Civil War. If conflict in the vicinity of the Red Sea was no longer a risk, then the Southwestern Indian Ocean's importance would markedly decrease.

In all presented scenarios, the Southwestern Indian Ocean states could facilitate or inhibit the shift away from the Red Sea.

South Africa's ports rank amongst the worst in the world, reducing the desirability of the already longer route around the Cape of Good Hope.⁴⁴ Mozambique is struggling with a jihadist insurgency in the north of the country, and this has prevented the exploitation of gas fields in the Mozambique channel.⁴⁵ Indian Ocean expert David Brewster has noted that these jihadists could exacerbate the existing problem of piracy in the channel.⁴⁶ These problems could discourage transiting the Cape of Good Hope, or if the issues were resolved, spur the shift away from reliance on the riskier Red Sea.



7 POLICY RECOMMENDATIONS

As the strategic environment in East Asia and Southeast Asia becomes more complex and Australia's relative military and economic position worsens in our region, Canberra must focus on low-cost and achievable actions in the Southwestern Indian Ocean.⁴⁷ Working through and strengthening multilateral organisations with likeminded countries to balance Chinese influence will be key. This is especially true in the case of South Africa. Ensuring Pretoria's alienation from Washington does not harm South African relations with American allies like Australia will be important for trade security.

The most important policy recommendation offered by this report is to implement the recommendation of the 2023 Defence Strategic Review, and to further expand those recommendations to encompass the Southwestern Indian Ocean.

The 2023 Defence Strategic Review noted: 'the Defence Cooperation Program must continue to grow in importance. It should be expanded in the Indian Ocean region, particularly the Northeast Indian Ocean.'⁴⁸ Inviting Southwestern Indian Ocean states like Mauritius to this program would be a practical way to increase Australia's presence. The Defence Force's annual Indo-Pacific Endeavour activities could also be expanded to encompass the Southwestern Indian Ocean.

The Endeavour's focus on maritime security law has natural synergies with Australia's goals in engaging with Southwestern Indian Ocean states. Enmeshing states like South Africa, Madagascar, and Mauritius into a program like Endeavour that already hosts countries with a common interest in free trade and Indian Ocean security like Singapore, Indonesia, and Malaysia would forward Australian influence at low cost.⁴⁹ A more active maritime security approach could leverage Australia's historic role in anti-drug smuggling efforts off the coast of Africa. Canberra could assist Mozambique, Madagascar, or South Africa if piracy in the Mozambique Channel became a larger problem.⁵⁰

Australia's membership of regional organisations should also be utilised to deepen ties with the Southwestern Indian Ocean states. The Indian Ocean Rim Association (IORA) is the premier forum for Indian Ocean-adjacent states. Despite its limitations and small budget, it has been identified as a forum where Indian Ocean states can raise security concerns. Australia has long played a leading role in this organisation and there is an appetite for increased cooperation.⁵¹ Raising the profile of IORA – in the way that the Howard government raised the profile of the Asia-Pacific Economic Cooperation (APEC) – should be considered. This includes proposing new areas for collaboration. IORA's importance can dovetail with recent Commonwealth of Nations undertakings.

Although excluding Madagascar, the Commonwealth includes South Africa, Mozambique, and Mauritius. The 2024 Apia Commonwealth Ocean Declaration for One Resilient Common Future recognised the 'critical role of maritime transport in the global economy' and called for ambitious action on shipping emissions. This established the Commonwealth Oceans Ministers Meeting.⁵² The environmental impacts of maritime shipping transiting the Cape of Good Hope, and Australia's ability to share climate-related scientific expertise and skills with these states, provides a clear case for greater Commonwealth and therefore Australian involvement in the region.

France and India stand out as two states with significant influence and alignment with Australia on trade and security matters.



The Australia–India–France Trilateral Dialogue, dormant since the announcement of AUKUS, represented this alignment well. Enhanced cooperation with France has been widely discussed and extending this cooperation from the Pacific to the Southwestern Indian Ocean is a simple step.⁵³ Relations with India continue to strengthen.⁵⁴ Reviving the Australia–India–France dialogue would allow for coordination in any scenario where the Cape of Good Hope becomes the primary sea lane for Europe–Asia trade.

These policy options prioritise ‘bang for buck’ and respect the reality that Australia’s primary area of defence interest is Southeast Asia and the Pacific. Increased engagement will give Canberra the flexibility to focus on the region when trade is diverted through it or when regional crises emerge.

POLICY RECOMMENDATIONS

- Implement the recommendation of the 2023 Defence Strategic Review and expand those recommendations to encompass the Southwestern Indian Ocean.
- Utilise Australia’s membership of regional organisations like IORA to deepen ties with the Southwestern Indian Ocean states.
- Enhance Australia’s engagement with India and France, including reviving the Australia–India–France trilateral dialogue.

8 CONCLUSION

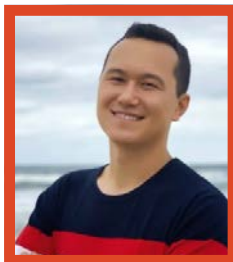
The Southwestern Indian Ocean represents a region of latent strategic significance that Australia cannot afford to ignore. Red Sea disruptions have demonstrated that global trade routes are vulnerable to both deliberate and accidental interference. The resultant shift of maritime traffic around the Cape of Good Hope has placed this region at the centre of a potential long-term realignment of global commerce. Whether this shift becomes permanent or temporary, Australia must position itself to respond effectively to either scenario.

The concentration of Australian trade through Asian sea lanes remains the primary concern for Canberra’s defence and economic security. However, the diversification of trading partners, particularly with Europe, necessitates a broader strategic perspective that encompasses the Southwestern Indian Ocean. The region’s importance is compounded by growing Chinese influence in states like South Africa, Mozambique, and Madagascar, alongside India’s expanding presence and France’s continued role through its overseas territories. Australia’s own territory in the region, the Heard and McDonald Islands, provides a foothold that has been underutilised in strategic terms.

The policy recommendations outlined prioritise low-cost, high-impact engagement that does not detract from Australia’s primary focus on Southeast Asia and the Pacific. In an increasingly unpredictable strategic environment, where disruptions can occur with little warning, understanding and engaging with the Southwestern Indian Ocean is not merely prudent – it is essential to Australia’s long-term economic security and strategic interests.



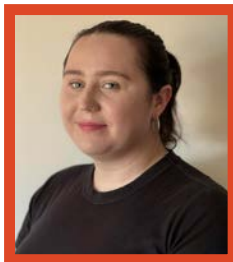
ABOUT THE AUTHORS



Dr. Alexander Lee

Visiting Fellow, Strategic and Defence Studies Centre, Australian National University

Dr Alexander Lee was awarded his PhD by the Australian National University. He has published widely on the political and military history of Australia from federation to present. He was a Senior Researcher on the Strategic Policy History Project, a joint initiative between the Department of Defence and the Australian National University and is now a visiting fellow at the Strategic and Defence Studies Centre.



Eloise Kelly

Project Officer, Strategic and Defence Studies Centre, Australian National University

Eloise Kelly served in the Australian Army and has worked on major defence projects. She is currently engaged in post-graduate research at the University of New England and continues to work on the Strategic Policy History Project.



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ACKNOWLEDGEMENTS

Several experts provided insights on this report. Nonetheless, the authors are responsible for all content, arguments, and possible errors contained herein. This research was supported by the Australian Government through a Department of Defence Strategic Policy Grants Program grant. The views expressed herein are those of the authors, and do not represent those of the Australian Government or the Australian Department of Defence.

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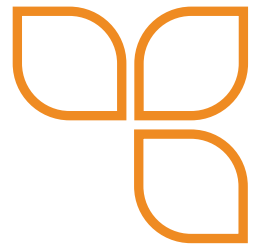
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The Southwestern Indian Ocean
and Australian Security

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Perth USAsia Centre

Volume 27, February 2026

