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SoH Blockade – SITREP #35: April 23, 2026

F-2026-04-23a

Classification: TLP:CLEAR

Criticality: High

Intelligence Requirements: Geopolitics

April 23, 2026

Scope Note

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| Key Findings

- On April 21, 2026, the United States unilaterally extended its ceasefire with Iran indefinitely while maintaining its blockade of the Strait of Hormuz (SoH). This followed several days of chaos in the SoH perpetrated by both sides, which was likely an effort to maximize leverage ahead of further talks. The United States and Iran will likely resume talks, but escalatory risks remain—especially as both sides maintain dual blockades of the SoH.
- Measured military responses to these setbacks signal that both the United States and Iran are likely reluctant to return to armed conflict and instead prefer to utilize economic coercion to increase ceasefire pressure. Vessel seizures by the U.S. Navy are likely being used as coercive measures to get Iran to return to talks.
- Since the terms of the ceasefire require the SoH to remain closed, all of the negative economic consequences seen during the all-out war will very likely worsen.

- Iran’s Islamic Revolutionary Guards Corps (IRGC) publicly rejected concessions made by Iran’s civilian leadership, which has been present at talks in Islamabad. These divisions likely instill doubts that any agreements made by Iran will be upheld by the IRGC. This is likely an effort by the IRGC to influence talks to achieve a negotiated settlement that favors Iran’s military-political establishment.
- Because of the differences between the Iranian factions, Iran will likely require the United States to de-escalate—most likely by partially lifting its blockade—before returning to talks.
- Before the recent setbacks, negotiation gaps had narrowed notably related to Israel-Hezbollah and Iran’s nuclear program. Gaps in both sides’ negotiating positions likely remain elsewhere; as a result, the ceasefire is fragile.

| Latest Details

On April 15–16, 2026, a 10-day ceasefire between Israel and Lebanon went into effect. Hezbollah, while not a party to the talks, said it would uphold the ceasefire. While regular violations of the truce have been reported,¹ it is likely to be extended as long as U.S.-Iran talks progress. On April 22, 2026, reports indicated that the Lebanese government would request a one-month extension of the agreement during talks with Israeli officials to be held in Washington, D.C. on April 23.²

- Israeli public opinion remains largely opposed to bilateral negotiations, which further reduces the prospect of a long-term ceasefire agreement.³ Meanwhile, on April 19, 2026, Israel announced that it will maintain a “buffer zone” in south Lebanon stretching approximately five to 10 kilometers (three to six miles) into the

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[hXXps://www.timesofisrael\[.\]com/idf-says-hezbollah-breached-truce-launching-rockets-at-troops-drone-at-israel/](https://www.timesofisrael.com/idf-says-hezbollah-breached-truce-launching-rockets-at-troops-drone-at-israel/)

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[hXXps://www.naharnet\[.\]com/stories/en/319710-lebanon-to-request-one-month-truce-extension-in-israel-meeting](https://www.naharnet.com/stories/en/319710-lebanon-to-request-one-month-truce-extension-in-israel-meeting)

³ [hXXps://en.idi\[.\]org\[.\]il/articles/63920](https://en.idi.org.il/articles/63920)

country, prohibiting locals from returning to this area.⁴⁵ If Israel occupies this territory for the medium- to long-term, it is likely to increase instability in Lebanon and foster continued armed conflict aimed at expelling Israeli troops.

- A long-term agreement remains unlikely because Israel is unlikely to retreat from the buffer zone while Hezbollah remains armed, and the Lebanese Armed Forces (LAF) likely lacks the capability to disarm the group.
- Although both sides report near-daily violations, the killing of senior Hezbollah members or a high casualty event involving Israeli soldiers or civilians would likely lead to the collapse of the truce and potentially the overall U.S.-Iran ceasefire.

SoH Chaos

On April 17, Iran's Foreign Minister Abbas Araghchi announced that Iran was reopening the SoH as long as vessels coordinated with the IRGC during passage.⁶ While President Trump welcomed the announcement, he also said the United States would maintain its naval blockade of the SoH until Iran agreed to reach a deal. The IRGC then overrode Araghchi, saying he had exercised "poor judgment" and declaring the strait shut once more until the United States lifted its blockade.⁷ Iranian forces subsequently fired on several foreign ships passing through the strait, though no casualties were reported.

- Only a handful of commercial vessels passed through the SoH during its brief reopening, with most opting to stay put—likely out of fear of sea mines or a sudden reversal by Iran's government.

While Iran was successful in reimposing its blockade in the SoH, a return to fighting is unlikely as long as ceasefire talks remain viable. The IRGC is likely seeking to exert

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[hXXps://www.reuters.com/world/middle-east/israeli-military-publishes-map-south-lebanon-territory-under-its-control-2026-04-19/](https://www.reuters.com/world/middle-east/israeli-military-publishes-map-south-lebanon-territory-under-its-control-2026-04-19/)

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[hXXps://www.wsj.com/livecoverage/iran-war-israel-us-strait-hormuz-2026/card/israel-warns-south-lebanon-reidents-not-to-return-S9AztIX5R3TxTJdrsTTa](https://www.wsj.com/livecoverage/iran-war-israel-us-strait-hormuz-2026/card/israel-warns-south-lebanon-reidents-not-to-return-S9AztIX5R3TxTJdrsTTa)

⁶ [hXXps://x.com/araghchi/status/2045121573124759713](https://x.com/araghchi/status/2045121573124759713)

⁷ [hXXps://www.tasnimnews.com/fa/news/1405/01/28/3568016/](https://www.tasnimnews.com/fa/news/1405/01/28/3568016/)

leverage over Iran's civilian leadership to ensure that IRGC priorities are at the forefront in the negotiations. While back-channel communications between Iran and the United States are all but certainly taking place, official talks remain paused amid the standoff. A round of negotiations scheduled to take place in Islamabad on April 21 was canceled at the last minute when Iran confirmed it would not be sending representatives.

- While Iran's civilian leaders remain the public face of the regime and maintain most of their pre-war authority, the IRGC has almost certainly used the conflict to consolidate its power and increase its influence over government decision-making. Civilian leaders now very likely face much greater pressure to comply with IRGC demands compared to before the war.
- The power struggle between the IRGC and Iran's civilian leaders makes it unclear whether Iran would abide by any agreement reached in Islamabad. Civilian negotiators are all but certainly under pressure to prioritize IRGC demands, and the IRGC very likely has the ability and willingness to override any agreement on the Iranian side. It is likely that one of IRGC's demands is that Iran leaders not attend talks if the SoH remains under U.S. blockade.
- Differences between the two Iranian factions will likely continue to impact talks.

Ceasefire Extended

Finally, on April 21, 2026, President Trump extended the ceasefire with Iran indefinitely, saying it would remain in effect until Iran's government presents a "unified proposal" for a new agreement.⁸ The move underscores recent reporting that gaps between Iran's civilian leadership and the IRGC have widened in recent weeks, with civilian negotiators appearing willing to offer concessions but the IRGC preventing them from doing so.

- The indefinite U.S. ceasefire extension by President Trump, combined with the continued SoH blockade, likely signals the Trump administration's preference for increasing economic pressure on Iran over resuming armed conflict.

⁸ [hXXps://www.nytimes\[.\]com/2026/04/21/us/politics/vance-islamabad-iran-peace-talks.html](https://www.nytimes.com/2026/04/21/us/politics/vance-islamabad-iran-peace-talks.html)

- Pakistani negotiators similarly said they were awaiting a “unified” proposal from Iran, which is very likely a reference to the divergent Iranian positions.

On April 22, only hours after President Trump’s announcement, Iran claimed to have seized two commercial vessels in the SoH that it said attempted to navigate the strait “without the necessary permits.”⁹ The Trump administration said it did not see this action as a violation of the ceasefire¹⁰, ostensibly leaving the door open for new talks. However, the U.S. Navy announced on the same day that it had seized three Iranian oil tankers in waters off India, Malaysia, and Sri Lanka, further dialing up the pressure on Iran.¹¹

- While these seizures seem to suggest the United States and Iran are close to resuming hostilities, they are very unlikely to do so while talks remain a viable option. Neither side has a large incentive to continue fighting. A resumed U.S. air campaign would all but certainly deplete valuable munitions while deepening global economic turmoil in exchange for limited strategic and tactical gains. At the same time, Iran faces its own munitions supply issues and economic difficulties as a result of the conflict and is very unlikely to resume the regional missile campaign against its neighbors unless fighting resumes.

Recent setbacks in commercial shipping transits through the SoH, combined with the United States maintaining its blockade during the indefinite ceasefire extension, very likely means commercial shipping in the strait will remain non-existent. Therefore, all of the negative economic impacts felt during the armed conflict stage of the war will very likely remain as long as the SoH remains closed.

However, this situation also signals that a negotiated settlement is more likely than a return to fighting, which would almost certainly include increased Iranian targeting of nearby Gulf countries and likely see U.S. ground forces in Iran.

- Neither side is likely to lift its blockade without significant progress in talks.

⁹ [hXXps://www.nytimes\[.\]com/2026/04/22/world/middleeast/iran-ships-attacked-strait-hormuz.html](https://www.nytimes.com/2026/04/22/world/middleeast/iran-ships-attacked-strait-hormuz.html)

¹⁰ [hXXps://www.cnn\[.\]com/2026/04/22/world/live-news/iran-war-us-trump-blockade-ceasefire](https://www.cnn.com/2026/04/22/world/live-news/iran-war-us-trump-blockade-ceasefire)

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[hXXps://www.reuters\[.\]com/world/middle-east/us-intercepts-three-iranian-oil-tankers-asian-waters-sources-say-2026-04-22/](https://www.reuters.com/world/middle-east/us-intercepts-three-iranian-oil-tankers-asian-waters-sources-say-2026-04-22/)

- An escalatory risk remains from the tit-for-tat attacks on global shipping. There is a roughly even chance Iran's continued threat to break the U.S. blockade prompts a clash leading to Iranian retaliation against Gulf infrastructure or an expansion of the conflict zone to the Red Sea via the Houthi rebels in Yemen.

Despite this risk, President Trump framed the indefinite ceasefire and blockade as an alternative to war, stating that without the blockade, "there can never be a Deal with Iran, unless we blow up the rest of their Country, their leaders included!"¹² UN Envoy Amir-Saeid Iravani signaled a possible agreement by suggesting Iran would likely return to talks if the blockade were lifted.¹³

- Because of the differences between the Iranian factions, Iran will likely require the United States to de-escalate—most likely by partially lifting its blockade—before returning to talks.

While some in Iran view the ceasefire extension as a tactic to resume fighting later, citing ongoing U.S. military deployments, both sides are likely prioritizing economic coercion over a return to conflict.

- The *USS George HW Bush* naval ship is days away from joining two other aircraft carriers already stationed outside the SoH, while another is stationed in the Red Sea.¹⁴
 - Removing or reducing these deployments would likely suffice as a de-escalatory measure that would prompt Iran to return to talks.

¹²

[hXXps://edition.cnn\[.\]com/2026/04/21/world/live-news/iran-war-us-trump-israel?post-id=cmo8m1k6o00003b6ugcja7xgi](https://edition.cnn.com/2026/04/21/world/live-news/iran-war-us-trump-israel?post-id=cmo8m1k6o00003b6ugcja7xgi)

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[hXXps://energy.economictimes.indiatimes\[.\]com/amp/news/oil-and-gas/tehran-received-signs-indicating-us-ready-to-end-naval-blockade-iraian-envoy-to-un-iravani/130436438](https://energy.economictimes.indiatimes.com/amp/news/oil-and-gas/tehran-received-signs-indicating-us-ready-to-end-naval-blockade-iraian-envoy-to-un-iravani/130436438)

¹⁴

[hXXps://www.forbes\[.\]com/sites/petersuciu/2026/04/19/three-us-navy-aircraft-carriers-will-soon-be-in-the-middle-east/](https://www.forbes.com/sites/petersuciu/2026/04/19/three-us-navy-aircraft-carriers-will-soon-be-in-the-middle-east/)

- Allies of both the United States (mainly Gulf oil producers) and Iran (China, which buys Iranian energy) likely cannot afford further economic shocks from the war, and the latter is very likely pressuring Iran to return to talks.

Negotiating Gaps Shrinking

The United States has reportedly dropped its demand for Iran to cease uranium enrichment, instead signaling a willingness to accept an unspecified moratorium on enrichment. Iran would likely accept this if it includes sanctions relief and access to frozen funds. Iran reportedly counter-proposed a five-year freeze to the United States' 20-year proposal.

- In addition to gaps around the timeframe for Iran to freeze its uranium enrichments, there appears to be another centered on Iran exporting its existing enriched uranium.

U.S. demands regarding Iran's proxy support and missile programs currently appear to be a low priority. While Iran is unlikely to accept maximalist demands on its missile programs, there is a roughly even chance it will accept constraints such as a self-imposed ceiling on the amount and range of its missiles.

- Issues surrounding Iran's support for proxies and its missile program will likely re-emerge in future talks. U.S. negotiators are reportedly focused on an interim deal to first resolve the nuclear issue and Iran's control over the SoH, leaving other matters for later resolution. However, Iran reportedly seeks a comprehensive agreement covering all aspects, likely viewing it as better long-term protection against renewed fighting.
- Iran is unlikely to lift its control over the SoH unless a comprehensive agreement on all the issues is reached. Therefore, an interim agreement with some form of Iranian control of the SoH is likely.

Long-standing differences over lifting sanctions on Iran remain as well. Iran is reportedly demanding control over the SoH and over USD 300 billion from the United States—either

in sanctions relief or direct payments.¹⁵ The United States will almost certainly reject these demands.

Conclusion

Iran's measured response to the U.S. blockade and the United States' indefinite ceasefire extension signal that both sides likely prefer to avoid a return to armed conflict. Nevertheless, the U.S.-Iran ceasefire remains tenuous, especially over control of the SoH; President Trump says he will not lift the blockade until Iran proposes a deal, and Iran says it will not negotiate or reopen the SoH as long as the U.S. blockade remains in place. The ceasefire also remains fragile because of continued attacks on global shipping, the linked Israel-Lebanon ceasefire, and longstanding U.S.-Iran differences that are further stalling talks.

¹⁵ <https://foreignpolicy.com/2015/04/16/irans-300-billion-shakedown-sanctions-nuclear-deal/>

Appendix A: Traffic Light Protocol for Information Dissemination

	Red	Amber
WHEN SHOULD IT BE USED?	Sources may use TLP:RED when information cannot be effectively acted upon by additional parties and could lead to impacts on a party's privacy, reputation, or operations if misused.	Sources may use TLP:AMBER when information requires support to be effectively acted upon but carries risks to privacy, reputation, or operations if shared outside of the organizations involved.
HOW MAY IT BE SHARED?	Recipients may NOT share TLP:RED with any parties outside of the specific exchange, meeting, or conversation in which it is originally disclosed.	Recipients may ONLY share TLP:AMBER information with members of their own organization and its clients, but only on a need-to-know basis to protect their organization and its clients and prevent further harm. Note that TLP:AMBER+STRICT restricts sharing to the organization only.
	Green	Clear
WHEN SHOULD IT BE USED?	Sources may use TLP:GREEN when information is useful for the awareness of all participating organizations, as well as with peers within the broader community or sector.	Sources may use TLP:CLEAR when information carries minimal or no risk of misuse in accordance with applicable rules and procedures for public release.
HOW MAY IT BE SHARED?	Recipients may share TLP:GREEN information with peers and partner organizations within their sector or community but not via publicly accessible channels.	Recipients may share TLP:CLEAR information without restriction, subject to copyright controls.

Appendix B: ZeroFox Intelligence Probability Scale

All ZeroFox intelligence products leverage probabilistic assessment language in analytic judgments. Qualitative statements used in these judgments refer to associated probability ranges, which state the likelihood of occurrence of an event or development. Ranges are used to avoid a false impression of accuracy. This scale is a standard that aligns with how readers should interpret such terms.

Almost No Chance	Very Unlikely	Unlikely	Roughly Even Chance	Likely	Very Likely	Almost Certain
1-5%	5-20%	20-45%	45-55%	55-80%	80-95%	95-99%