



# | Flash |

## SoH Blockade – SITREP #34: April 14, 2026

F-2026-04-14a

Classification: TLP:CLEAR

Criticality: High

Intelligence Requirements: Geopolitics, Deep and Dark Web

April 14, 2026

## Scope Note

*ZeroFox Intelligence is derived from a variety of sources, including—but not limited to—curated open-source accesses, vetted social media, proprietary data sources, and direct access to threat actors and groups through covert communication channels. Information relied upon to complete any report cannot always be independently verified. As such, ZeroFox applies rigorous analytic standards and tradecraft in accordance with best practices and includes caveat language and source citations to clearly identify the veracity of our Intelligence reporting and substantiate our assessments and recommendations. All sources used in this particular Intelligence product were **identified prior to 10:15 AM (EDT) on April 14, 2026**; per cyber hygiene best practices, caution is advised when clicking on any third-party links.*

# | Flash | SoH Blockade – SITREP #34: April 14, 2026

## | Key Findings

- A U.S. naval blockade of the Strait of Hormuz (SoH) began on April 13, following the collapse of talks between U.S. and Iranian negotiators in Pakistan. The talks ended without a deal, almost certainly due to differences over reopening of the SoH and curbs on Iran's nuclear program. The United States has moved additional military assets into the region, increasing the likelihood of renewed hostilities.
- Despite the blockade, the 14-day ceasefire between the United States and Iran is holding—notably without Iran retaliating to the blockade. Further talks are therefore likely. However, the conflict remains fragile elsewhere, with Israel targeting Hezbollah. Israel's Lebanon campaign risks prolonging the conflict with Iran, which has signaled its readiness to reopen the SoH only if attacks on Hezbollah cease.
- Ships are unlikely to transit the SoH, as doing so will either be in defiance of the United States, making them subject to confiscation, or Iran, making them military targets. However, as it has become clear that Iran is unlikely to retaliate to the blockade, leading economic indicators have thus far remained positive.

## | Talks Collapse

A U.S. naval blockade of Iranian ports and coastal areas in the SoH began at 10:00 AM EST on April 13, following the collapse of negotiations between U.S. and Iranian representatives in Pakistan. The talks, which ended on April 11, reportedly failed because the parties were unable to come to an agreement on fully reopening the SoH or curbing Iran's nuclear program.<sup>1</sup> The U.S. delegation—led by U.S. Vice President JD Vance—reportedly demanded that Iran end its nuclear program, cease support for regional proxies such as Hezbollah, and relinquish control of the SoH. In response, Iran reportedly demanded sanctions relief, the right to enrich uranium, and a form of control over the SoH.<sup>2</sup>

Despite these setbacks, there is likely a path forward for negotiations, especially as the 14-day ceasefire window does not end until April 21. Pakistan has offered to host a second round of U.S.-Iran talks, and Turkey (which was also involved in the failed negotiations over the weekend) has also offered to broker a deal to re-start talks.<sup>3</sup>

- The United States has likely achieved the majority of its Operation Epic Fury objectives that would not require a military escalation involving ground forces. The conflict has illustrated that a total collapse of the Iranian military-political establishment is not likely, and the Trump administration is likely weighing further military escalation against additional economic costs.
- Iran has suffered appreciable economic and military damage throughout the conflict and is likely experiencing significant political pressure from China (which buys 95 percent of Iran's oil<sup>4</sup> and is therefore impacted by the blockade) to come to an agreement.

---

<sup>1</sup> [hXXps://time.com/article/2026/04/13/iran-US-peace-talks-islamabad-war-nuclear/](https://time.com/article/2026/04/13/iran-US-peace-talks-islamabad-war-nuclear/)

<sup>2</sup> [hXXps://time.com/article/2026/04/13/iran-US-peace-talks-islamabad-war-nuclear/](https://time.com/article/2026/04/13/iran-US-peace-talks-islamabad-war-nuclear/)

<sup>3</sup> [hXXps://time.com/article/2026/04/14/us-iran-talks-war-ceasefire-trump-nuclear-enrichment-strait-hormuz/](https://time.com/article/2026/04/14/us-iran-talks-war-ceasefire-trump-nuclear-enrichment-strait-hormuz/)

<sup>4</sup>

[hXXps://www.bloomberg.com/opinion/articles/2026-04-14/the-hormuz-blockade-is-as-much-about-china-as-iran](https://www.bloomberg.com/opinion/articles/2026-04-14/the-hormuz-blockade-is-as-much-about-china-as-iran)

## **Strait of Hormuz**

Neither the United States nor Iran have fully clarified their conditions for commercial shipping in the SoH. Iran has signalled its intent to solidify control of the SoH to extract rents. While this is almost certainly unacceptable to the United States, the Trump administration likely accepts that military or economic pressure is unlikely to change the situation in the short term and that negotiations offer a better probability of succeeding. Iran has indicated that assurances against further military aggression could result in it relinquishing control over the SoH.<sup>5</sup>

## **Nuclear Program**

There are likely fewer differences between both parties regarding the nuclear program than are being reported. The United States has repeatedly said that Iran must end its uranium enrichment and hand over remaining stockpiles, while Iran has said it will dilute its uranium enrichment but not relinquish stockpiles. During the most recent talks, the United States reportedly demanded that Iran halt all uranium enrichment for 20 years. Iran responded with a proposed five-year pause, which the United States rejected.<sup>6</sup> Iran also offered a five-year pause during the failed negotiations leading up to the outbreak of hostilities. However, Iran has offered to pledge not to build a nuclear weapon and will likely accept restrictions on uranium enrichment.

## **Proxies and Missiles**

Major differences do remain over Iran's support for proxies abroad and its missile program. Iran very likely views these as key deterrents against further military aggression, despite both programs being severely degraded due to recent years of U.S./Israeli military operations. If the war ends, Iran is likely to focus domestically on preventing conditions that cause another uprising before rebuilding its foreign deterrents.

---

<sup>5</sup> [hXXps://www.youtube\[.\]com/watch?v=Q\\_VGwpXEixY](https://www.youtube.com/watch?v=Q_VGwpXEixY)

<sup>6</sup> [hXXps://www.nytimes\[.\]com/2026/04/13/us/politics/us-iran-deal.html](https://www.nytimes.com/2026/04/13/us/politics/us-iran-deal.html)

## | Strait of Hormuz Blockade

The U.S. blockade of the SoH specifically targets all ships entering and exiting Iranian ports but excludes vessels traveling to and from non-Iranian ports.<sup>7</sup>

- Initially, President Trump threatened to interdict every vessel attempting to leave or enter the SoH. Later on, the U.S. military's CENTCOM stated the blockade would apply only to ships "entering or departing Iranian ports and coastal areas," including those that are suspected of paying a transit fee to Iran.<sup>8</sup>

The new blockade very likely seeks to put pressure on Iran for future negotiations by restricting its income. Since the beginning of the war, Iran has profited from SoH traffic in two major ways.

- First, loosened sanctions on Iran's oil have made it easier to sell abroad, allowing Iran to capitalize on globally inflated prices. Iranian tankers have continued to freely transit the SoH, while those of other countries remain restricted.
- Second, Iran has charged transit fees up to USD 2 million for select commercial vessels seeking to pass through the SoH, with higher priority and discounted rates given to vessels from nations deemed friendly to Iran.<sup>9</sup>

The U.S. blockade likely seeks to restrict both forms of income by interdicting vessels suspected of carrying Iranian oil or paying Iranian transit fees. If effective, this would curb revenue for Iran's economy, which is almost certainly heavily damaged from years of sanctions and degraded from the current conflict.

However, fully securing the SoH is complicated by several factors. First, Iran has likely mined a portion of the SoH in an attempt to channel vessels into Iranian territorial waters where it is easier to charge them transit fees, which Iran very likely intends to fund its

---

<sup>7</sup> <https://www.cnn.com/2026/04/12/trump-iran-war-strait-of-hormuz.html>

<sup>8</sup>

<https://www.centcom.mil/MEDIA/PRESS-RELEASES/Press-Release-View/Article/4457255/us-to-blockade-ships-entering-or-exiting-iranian-ports/>

<sup>9</sup>

<https://www.loydlist.com/LL1156656/iran-establishes-safe-shipping-corridor-for-approved-and-paid-for-transits>

reconstruction. Second, full control of the SoH would likely require a greater number of U.S. warships than are currently stationed in the region, although more are on their way.

- To fully secure the mined sections, de-mining operations and subsequent naval escorts for transiting ships will likely be necessary. The U.S. Navy has begun initial minesweeping operations<sup>10</sup> but will very likely need additional minesweeper ships to secure the affected area.
- Minesweeping operations—coupled with the U.S. blockade’s goal of only interdicting Iran-affiliated ships—suggests the Trump administration is likely setting the stage to encourage more commercial vessels to pass through the SoH, despite Iranian threats.

In response to the blockade, Iran has threatened to target U.S. ships and the port infrastructure of neighboring Gulf countries. Iran’s Islamic Revolutionary Guard Corps (IRGC) declared that any military vessels approaching the SoH would be deemed a violation of the ceasefire and would be “dealt with harshly and decisively.”<sup>11</sup> Iran’s military further announced that if a blockade on Iranian ports is enforced, “no Gulf port will be safe.”<sup>12</sup> A retaliatory escalation by Iran targeting other nearby Gulf energy targets would very likely send global energy prices even higher.

- Despite these threats, Iran has not retaliated to the blockade, and when it became clear they would not do so, both oil prices and major stock indexes improved.<sup>13</sup> This is likely a market response to Iranian indications that it is open to further talks.

However, normal passage through the SoH is not expected soon, and energy and market impacts are likely to worsen. A U.S.-enforced blockade is unlikely to alleviate ship owners’

---

<sup>10</sup>

[hXXps://news.usni\[.\]org/2026/04/11/two-u-s-warships-sail-through-strait-of-hormuz-to-establish-new-route-for-merchant-ships](https://news.usni.org/2026/04/11/two-u-s-warships-sail-through-strait-of-hormuz-to-establish-new-route-for-merchant-ships)

<sup>11</sup>

[hXXps://www.reuters\[.\]com/world/middle-east/irans-guards-will-view-military-vessels-approaching-strait-ceasefire-breach-2026-04-12/](https://www.reuters.com/world/middle-east/irans-guards-will-view-military-vessels-approaching-strait-ceasefire-breach-2026-04-12/)

<sup>12</sup>

[hXXps://economictimes.indiatimes\[.\]com/industry/energy/oil-gas/oil-prices-today-irans-armed-forces-say-us-restrictions-on-vessels-in-hormuz-amounts-to-piracy/articleshow/130229786.cms?from=mdr](https://economictimes.indiatimes.com/industry/energy/oil-gas/oil-prices-today-irans-armed-forces-say-us-restrictions-on-vessels-in-hormuz-amounts-to-piracy/articleshow/130229786.cms?from=mdr)

<sup>13</sup> [hXXps://tradingeconomics\[.\]com/commodity/crude-oil](https://tradingeconomics.com/commodity/crude-oil)

safety concerns, as transiting under U.S. guidance risks Iranian retaliation, while transiting with Iranian support risks ships being boarded and cargo seized.

- This blockade and the cargo seizures echo the Trump administration's successful use of similar measures against Venezuela, which involved using warships to pursue oil-carrying vessels as far as the Indian Ocean.<sup>14</sup> Consequently, shipowners are almost certainly going to avoid transiting the SoH.

Both sides' efforts to police the SoH create room for an incident with the potential to quickly escalate the conflict. To this end, between April 12–13, 2026, the U.S. military reportedly conducted a “massive uptick” in airlift and air refueling missions in Europe and the Middle East.<sup>15</sup> Increased numbers of C-17 cargo aircraft, as well as KC-135 air refueling tankers, were noted on flight trackers flying a higher than normal number of sorties.<sup>16</sup> The increased airlift operation is very likely intended to resupply U.S. forces in the region and deploy additional forces needed for enforcement of the blockade—but there is also a roughly even chance these flights are an indicator of renewed hostilities.

## | Lebanon

The conflict remains fragile elsewhere due to Israeli Prime Minister Benjamin Netanyahu's insistence that there is “no cease-fire in Lebanon.”<sup>17</sup> Israel's campaign in Lebanon risks prolonging the conflict with Iran, which has indicated it is ready to fully reopen the SoH only if Israeli attacks on Hezbollah cease. However, a report from April 13 indicated that the Israeli Defence Forces (IDF) may wind down its offensive in Lebanon after Israeli forces capture the strategic southern town of Bint Jbeil, which has been encircled by Israeli troops.<sup>18</sup><sup>19</sup> Further, despite earlier threats to occupy Lebanon up to the Litani River, the vast majority of fighting has remained limited to the border region.<sup>20</sup>

---

<sup>14</sup> <https://www.bbc.com/news/articles/c4ge763d7j6o>

<sup>15</sup> <https://www.jfeed.com/news-world/us-military-airlift-middle-east-1>

<sup>16</sup> <https://x.com/sentdefender/status/2043678409834791066>

<sup>17</sup> <https://www.nytimes.com/live/2026/04/09/world/iran-ceasefire-trump-lebanon>

<sup>18</sup> <https://www.jpost.com/middle-east/article-892814>

<sup>19</sup> <https://www.timesofisrael.com/idf-says-close-to-capturing-hezbollahs-historic-bint-jbeil-stronghold/>

<sup>20</sup>

<https://today.orientlejour.com/article/1503037/mapped-out-invading-israeli-troops-begin-the-battle-for-bint-jbeil.html>

Amid mounting pressure from the United States to end the conflict, talks between Israel and Lebanon are scheduled for the coming days.<sup>21</sup> Last week, Netanyahu announced that Israel would begin direct talks with the Lebanese government on disarming Hezbollah while continuing to target the group. Nonetheless, the Lebanese government likely lacks the military strength to seize Hezbollah's weapons, and any attempt to do so would likely risk triggering a civil war. In this vein, on April 13, 2026, senior Hezbollah officials led Secretary-General Naim Qassem rejected the negotiations and stated that the group would not abide by an agreement made between the Lebanon and Israel.<sup>2223</sup>

For Israel, limiting Hezbollah is likely far more critical than reopening the SoH, as Israel does not rely on it for its energy needs. Israel is more likely to prioritize further debilitating Iran's offensive weapons capabilities, which includes neutralizing Hezbollah in neighboring Lebanon.

- Israel very likely aims to continue the conflict but is unlikely to oppose an agreement supported by the United States. Israel will likely continue to push negotiators to separate the broader ceasefire from future efforts to target Iranian proxies that threaten Israel.
- The ceasefire is likely to remain threatened by Israel's operations in Lebanon unless the Trump administration pressures the Israeli government to abide by the deal or is able to negotiate the decoupling of the Iran and Lebanon conflicts.

## **| Conclusion**

Despite all this, both U.S. and Iranian negotiators are planning for further talks before the ceasefire expires. It remains unclear what (if anything) either side is willing to compromise on, but the initial pressures that led to negotiations in Islamabad persist. The United States almost certainly remains eager to end the economically damaging energy shocks, and Iran likely aims to stop the damaging airstrikes that are impacting its already fragile economy. It is unlikely that military escalations will further either side's goals, which is likely the impetus for the 14-day ceasefire. Therefore, while a return to

---

<sup>21</sup> [hXXps://www.axios\[.\]com/2026/04/09/israel-lebanon-negotiations-ceasefire](https://www.axios.com/2026/04/09/israel-lebanon-negotiations-ceasefire)

<sup>22</sup> [hXXps://www.yahoo\[.\]com/news/articles/hezbollah-official-says-group-wont-174815234.html](https://www.yahoo.com/news/articles/hezbollah-official-says-group-wont-174815234.html)

<sup>23</sup>

[hXXps://www.aljazeera\[.\]com/news/2026/4/13/hezbollah-leader-urges-lebanon-government-to-pull-out-of-israel-talks](https://www.aljazeera.com/news/2026/4/13/hezbollah-leader-urges-lebanon-government-to-pull-out-of-israel-talks)

full-scale war remains possible, there is a roughly even chance that both sides will return to the negotiating table.

## Appendix A: Traffic Light Protocol for Information Dissemination

	<b>Red</b>	<b>Amber</b>
<b>WHEN SHOULD IT BE USED?</b>	<b>Sources may use</b> <b>TLP:RED</b> 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.	<b>Sources may use</b> <b>TLP:AMBER</b> when information requires support to be effectively acted upon but carries risks to privacy, reputation, or operations if shared outside of the organizations involved.
<b>HOW MAY IT BE SHARED?</b>	<b>Recipients may NOT share</b> <b>TLP:RED</b> with any parties outside of the specific exchange, meeting, or conversation in which it is originally disclosed.	<b>Recipients may ONLY share</b> <b>TLP:AMBER</b> 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. <b>Note that</b> <b>TLP:AMBER+STRICT</b> restricts sharing to the organization only.
	<b>Green</b>	<b>Clear</b>
<b>WHEN SHOULD IT BE USED?</b>	<b>Sources may use</b> <b>TLP:GREEN</b> when information is useful for the awareness of all participating organizations, as well as with peers within the broader community or sector.	<b>Sources may use</b> <b>TLP:CLEAR</b> when information carries minimal or no risk of misuse in accordance with applicable rules and procedures for public release.
<b>HOW MAY IT BE SHARED?</b>	<b>Recipients may share</b> <b>TLP:GREEN</b> information with peers and partner organizations within their sector or community but not via publicly accessible channels.	<b>Recipients may share</b> <b>TLP:CLEAR</b> 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%