

Possible escalation pathways and anticipated humanitarian impacts

KEY MESSAGES:

- An expansion in engagement by the de-facto authority (DFA) in the north of Yemen (also known as the Houthis) in the escalating tensions involving the US, Israel, and Iran – and the potential US-Israeli retaliatory operations – would further increase insecurity and accelerate the deterioration of humanitarian conditions and access constraints in Yemen.
- Escalation risk will rapidly worsen humanitarian conditions in Yemen, where over 22 million people already require assistance and many areas face Crisis or worse (IPC Phase 3+) levels of food insecurity.
- Damage or disruption to Red Sea ports would have immediate consequences, sharply reducing imports of food, fuel, and medical supplies and driving shortages and price increases.
- Humanitarian access constraints and protection risks are likely to intensify, including movement restrictions, staff harassment or detention, and tighter administrative controls that would delay or distort aid delivery.
- Severe funding gaps and operational constraints mean the humanitarian system has limited capacity to absorb shocks, increasing the likelihood of reduced assistance just as humanitarian needs are increasing.

BACKGROUND

On 28 March, the DFA launched a ballistic missile towards central Israel, marking their first reported attack since the onset of the conflict involving the US, Israel, and Iran. The Houthis stated that they would continue to conduct unspecified operations until the US and Israel cease military actions against Iran and its allies in the region (ISW 28/03/2026). At the time of writing, DFA attacks remain limited in scale and frequency, with reported strikes on Israel largely intercepted or resulting in minimal damage. The Houthis retain the capacity to escalate beyond current levels, including the targeting of US assets in the region and attacks on maritime trade in the Red Sea, and signalled the possibility of deeper involvement in the absence of a diplomatic

de-escalation (France 24 27/03/2026; Time 28/03/2026). DFA involvement, alongside the risk of retaliatory actions by the US and Israel, is likely to aggravate Yemen's already severe humanitarian conditions and further constrain humanitarian operations as a result of increased insecurity, access restrictions, and damage to logistical infrastructure. This escalation occurs in a context where more than half of Yemen's population (around 22 million people) requires humanitarian assistance and is facing Crisis (IPC Phase 3) food insecurity levels (OCHA 18/03/2026; IPC accessed 29/03/2026).

This report examines the risk of escalation on the Yemen front in the context of the current regional conflict involving Iran, Israel, and the US, focusing on potential trajectories of DFA involvement in regional tensions and likely retaliatory responses. It analyses the anticipated humanitarian impacts within Yemen, including effects on food security, fuel availability, and protection risks. The report also considers the operational challenges humanitarian responders are facing in Yemen, including access constraints, infrastructure damage, administrative barriers, and funding shortfalls.

Escalation trajectories could shift rapidly, depending on the US-Israel-Iran escalation dynamics, making the escalation pathways presented indicative rather than predictive. These trajectories are also not mutually exclusive and may unfold simultaneously or independently, compounding risks to the flow of essential imported goods and restricting humanitarian access, placing additional pressure on affected populations and humanitarian response capacity.

RISK OF FURTHER ESCALATION ON THE YEMEN FRONT

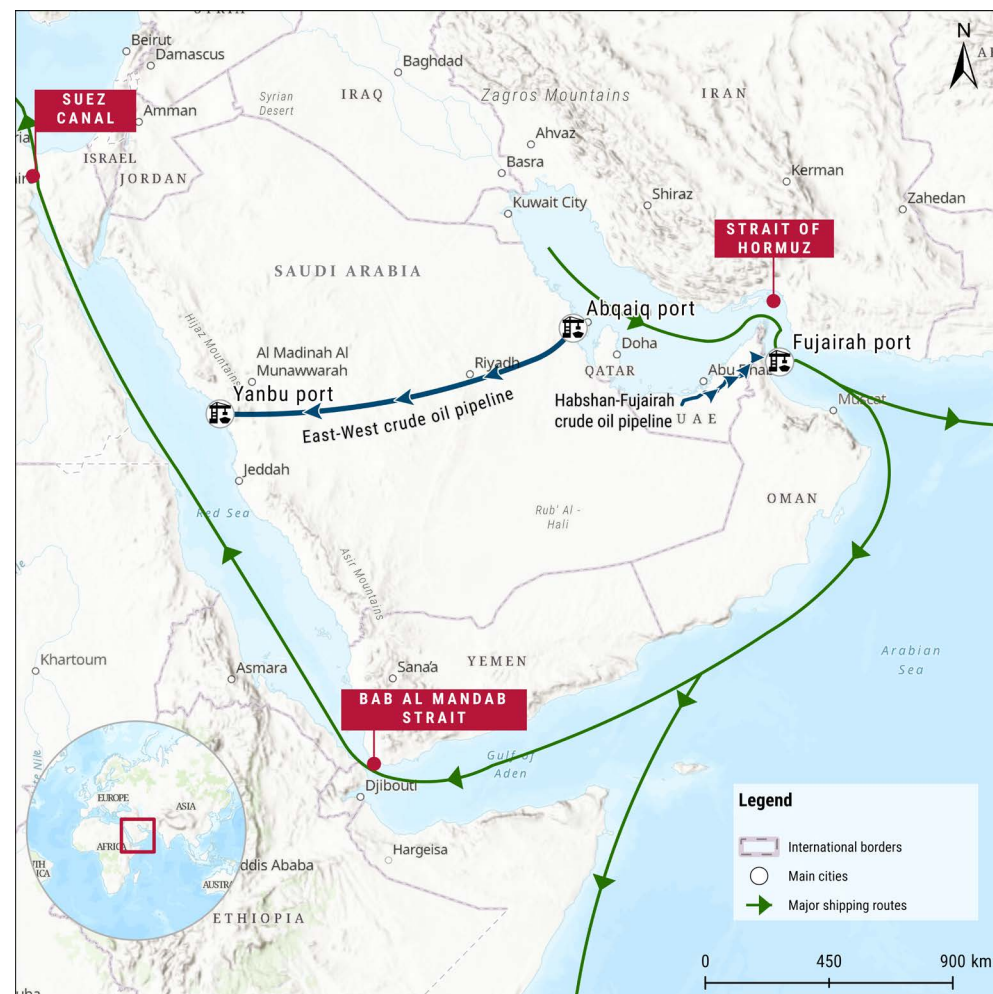
This section outlines three main escalation pathways, ranked in order of severity: (1) expansion of DFA attacks to include US assets in the region, (2) disruption of maritime trade through the Bab Al Mandab Strait, including threats to shipping and energy flows, and (3) attacks on energy infrastructure in Gulf states or on forces aligned with the Saudi-backed Internationally Recognized Government of Yemen (IRG). It also examines potential retaliatory responses.

The first potential escalation pathway could involve DFA attacks expanding to include US assets in the region, particularly in the absence of diplomatic de-escalation efforts. Reports that the US is considering ground operations, reinforced by the deployment of the 82nd Airborne Division to the region, suggest an elevated risk of such a scenario (Reuters 30/03/2026). To date, DFA operations have primarily targeted Israeli interests, but a shift towards US military bases or naval assets would represent a broader escalation and could trigger retaliatory responses.

The second potential escalation pathway is the disruption of maritime trade through the Bab Al Mandab Strait, which the DFA has threatened to close as a potential escalation measure (France 24 27/03/2026). Although the Houthis have not specified triggers for such escalation, it could be linked to retaliation against them or the expansion of Israeli-US operations against Iran, potentially including ground operations (Reuters 25/03/2026; ACLED 26/06/2025; FEWS NET 13/11/2025). Such a move may align with broader efforts by Iran to increase the economic costs of the regional escalation. The DFA has previously imposed restrictions on the passage of US- and Israel-linked vessels through the strait between December 2023 and January 2025 (Seatrade 16/03/2025). During this period, the Houthis conducted a sustained campaign targeting maritime traffic in the Red Sea, significantly disrupting one of the world's most critical trade routes, which typically carries around 12% of global trade (Reuters 25/03/2026; ACLED 26/06/2025).

The strategic importance of the Bab Al Mandab Strait has further increased as the disruptions of energy flow through the Strait of Hormuz have pushed Gulf exporters to reroute oil via alternative Red Sea outlets to ensure continuity of supply to global markets, resulting in a surge in maritime traffic. Saudi Arabia has rerouted around 7 million barrels of oil per day (equivalent to about 7% of global daily consumption) through the Red Sea corridor via the East-West pipeline. The UAE is also using the Abu Dhabi Crude Oil Pipeline to Fujairah to bypass Hormuz, exporting around 1.5 million barrels per day that then transit through Bab Al Mandab Strait, increasing the volume of high-value shipments passing through the area and raising the stakes of any DFA disruption or escalation. This has heightened both the economic value of the route and its vulnerability to DFA maritime attacks, particularly in the context of elevated global oil prices (Reuters 03/03/2026 and 07/03/2026; The Military Report 14/06/2024; The National 29/03/2026; Oil Price 18/03/2026). The increased strategic relevance of the route is likely to raise incentives for both targeting and protecting the corridor, heightening the risk of escalation and retaliatory actions in and around Yemen.

Map 1. Gulf crude oil export routes and chokepoints



Source: ACAPS using data from AJ (27/03/2026); S&P Global (10/03/2026); EIA (03/03/2026)

A third potential escalation pathway could develop through attacks on energy infrastructure in Gulf countries or on forces aligned with the Saudi-backed IRG in southern Yemen. This pathway could materialise in the event of direct involvement of Gulf countries in the attacks against Iran. The scenario remains least likely but most consequential, given that it would effectively end the April 2022 de-escalation

arrangement with Saudi Arabia and undermine peace negotiations that carry potential financial benefits for the DFA. Such a shift would be more likely if the Houthis assessed that the truce with Saudi Arabia has collapsed or that negotiations will not secure access to key economic resources, particularly in areas such as oil-rich Ma'rib (The Ideology Machine 08/03/2026; Atlantic Council 10/03/2026). This could trigger the resumption of the intra-Yemeni conflict between the DFA and the Saudi-backed IRG forces.

Likely retaliatory responses

Increased DFA involvement is likely to prompt retaliatory measures from the US and Israel, with the response scale closely linked to the level and nature of the escalation. Previous responses – such as the Red Sea crisis from December 2023 to January 2025 – have included a combination of maritime security operations and air campaigns aimed at degrading DFA military capabilities. These have involved sustained air strikes over an extended period, resulting in significant casualties and damage to civilian infrastructure, including fuel facilities and power plants (ACLED 26/06/2025).

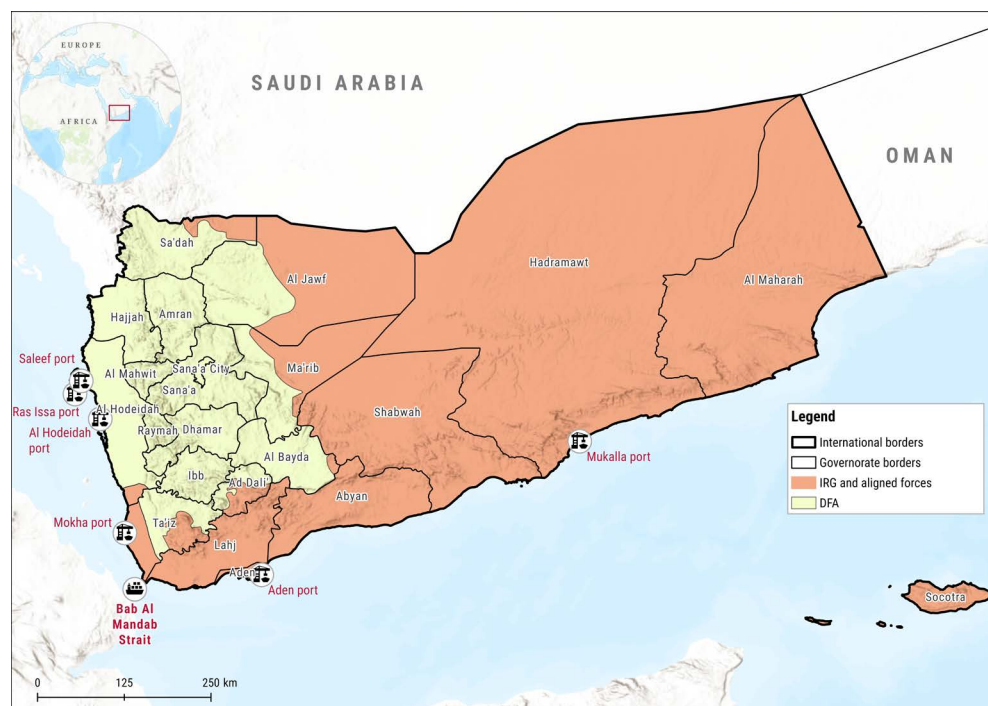
If the DFA resumes attacks on maritime trade in the Red Sea, retaliatory strikes by the US and Israel are likely to focus on key logistical infrastructure in western Yemen – particularly Al Hodeidah and Saleef seaports – as well as the Sana'a International Airport. Because they are key entry points for essential goods and aid supplies, these ports have been repeatedly targeted in previous response campaigns, with Israeli authorities having previously claimed that the ports were used for the transfer of weapons and military material, as well as the facilitation of operations targeting maritime traffic in the Red Sea. As such, these locations are likely to remain priority targets in any renewed escalation (The Guardian 10/06/2025; AJ 16/09/2025; SCR 20/01/2022; BBC 06/05/2026). Yemen's heavy reliance on imports makes the Red Sea ports of Al Hodeidah and Saleef critical, as they handle nearly 80% of the country's food supplies. Any damage to port infrastructure or insecurity around these facilities would severely disrupt operations, leading to a sharp decline in the flow of essential goods and humanitarian aid supplies into the country, as well as shortages and significant price increases for basic commodities resulting from reduced market availability (ACAPS 11/06/2025; FAO 28/02/2024).

Based on previous escalation patterns during the Red Sea crisis between December 2023 and January 2025, retaliatory strikes may also target fuel storage facilities and critical water and electricity generation infrastructure. Through targeted strikes, the US and Israel may also seek to hit key leadership figures and command and control structures. Along with their immediate political and military impacts, these attacks could also weaken administrative and operational capacity and constrain the DFA's ability to govern and deliver basic services in areas under its control (Aden Center 11/09/2025; Sana'a Center 02/09/2025). This is likely to have a direct impact on civilian populations, including reduced access to essential services such as water, electricity, and fuel, as well as broader disruptions of economic activity.

With the Red Sea gaining new strategic importance, a possible – albeit speculative – risk scenario involves the US considering a targeted ground operation to seize Al Hodeidah port and secure maritime trade routes. The risk of a large-scale ground offensive and the resumption of the intra-Yemeni conflict remains low, particularly in the absence of external support, owing to structural fragmentation and limited operational capacity.

Southern Yemen continues to face significant political and military divisions. Despite previously seeking international backing and advocating a stronger southern role in countering the DFA, the Southern Transitional Council, once a prominent southern power, has been significantly weakened following its formal dissolution in January. Although it continues to operate in a reduced and fragmented form, it is no longer in a position to independently sustain or lead major ground operations (South24 01/07/2025; AJ 12/01/2026; The New Arab 10/01/2026). The Saudi-backed IRG, which controls much of southern Yemen, appears primarily focused on maintaining the truce and lacks the capacity to sustain large-scale military operations against the DFA (Sana'a Center 15/02/2024).

Map 2. Yemen's main ports by areas of control



Source: ACAPS using data from AJ (14/01/2026); HDX (accessed 30/03/2026)

BASELINE HUMANITARIAN SITUATION AND ANTICIPATED IMPACTS OF CONFLICT ESCALATION

Previous bombing campaigns against the DFA have focused on key points of infrastructure within DFA-held areas, including ports, fuel depots, power stations, and the Sana'a International Airport. The damage or destruction of infrastructure has key humanitarian effects for the populations within DFA-controlled areas, who are already experiencing high humanitarian needs.

With the resumption of hostilities, an Israeli Defense Forces spokesperson identified that the DFA was “becoming part of this war”, while an unnamed senior Israeli Defense Forces official was quoted as saying that the Houthis “will pay the price”, indicating that retaliatory strikes on DFA-controlled areas are likely (CNN 29/03/2026; The Telegraph 28/03/2026). Further strikes on already compromised infrastructure carry significant potential to accelerate deterioration across the food security, health, and WASH sectors in a response environment that is already critically underfunded.

DFA-controlled areas are home to approximately 70% of Yemen's population, in a context where 22.3 million people across Yemen require humanitarian assistance and protection in 2026. DFA areas include a least 2.07 million IDPs (over 42%), with women-headed households accounting for over 30% of households in Al Hodeidah, Sana'a, and Aden – governorates that also face the highest levels of displacement and insecurity (OCHA 18/03/2026; OCHA HDX 16/01/2025)

Ports

Previous US and Israeli strikes in the 2024–2025 Red Sea escalation period targeted port infrastructure – particularly Al Hodeidah, Ras Issa, and Saleef, which handle 70% of Yemen's commercial imports and 80% of imported humanitarian assistance (HRW 19/08/2024 and 16/01/2025; Mwatana 02/10/2024). The strikes disrupted these commercial and humanitarian supply chains, preventing the import of food, fuel, and medical supplies. The ports entered 2026 in an already physically degraded state, with reconstruction efforts to fix the damage proceeding slowly and limiting capacity. The DFA estimated that direct damages amounted to over USD 531 million, while indirect losses reached USD 856 million as a result of service disruptions and the halt of vital supply chains. Import volumes through Red Sea ports under DFA control

are at their lowest levels in three years – down 19% from the same period in 2024 – with six consecutive months of declining imports at the end of March 2026 (Yemen Monitor 25/05/2025; YemenOnline 22/12/2025; ACAPS YETI accessed 30/03/2026).

Because of limited arable land and conflict-driven reductions in agricultural production, Yemen is importing approximately 85% of its food supply (FEWS NET accessed 30/03/2026). Any disruption to port functionality risks deepening a crisis in which Yemen already ranks first globally for the absolute number of people (5.5 million) in Emergency or worse (IPC Phase 4+) conditions and fourth for the total number of people (18.1 million) in Crisis or above (IPC Phase 3+) conditions (IPC accessed 30/03/2026). Across most DFA-controlled areas, IPC 3 outcomes are currently observed, with IPC 4 conditions recorded in Al Hodeidah, Hajjah, and Ta'iz. IDPs in these governorates are of particular concern (IPC accessed 01/04/2026). If the DFA escalates to active participation in regional hostilities, the potential retaliatory strikes would likely worsen food security conditions across their area of control, with a significant increase in the number of households reaching IPC 4 or worse. The timing is critical: the lean season, running from July–September, aligns with the period in which the effects of renewed escalation would be most acutely felt, as declining import volumes would compound already constrained food access across DFA-controlled areas (FEWS NET accessed 30/03/2026).

Previous strikes on DFA-controlled infrastructure reduced revenue generation from ports, including taxes, levies, and customs duties that are primary components of a wider taxation and extortion system worth approximately USD 13.6 billion in 2023. While imports have been recovering, a significant portion of this revenue shortfall has been transferred onto the population through increased taxation, with a steep rise in fees and restrictions across all commercial activity in late 2025 and early 2026. Such measures include the ban on US goods, a 100% customs tariff on non-food imports, and transit fees on all trucks moving goods out of Al Hodeidah and other districts. These levies are accelerating economic deterioration, forcing business closures, and driving up prices for key commodities, with poor households experiencing reduced purchasing power and finding it more difficult to meet food and non-food needs. Even prior to the current escalation, these measures were projected to drive increases in IPC 3 and 4 levels of food insecurity from April through September, with the hostilities raising the likelihood of further fiscal pressure from the DFA (FEWS NET accessed 30/03/2026). The convergence of direct port infrastructure damage, increased DFA taxation, and the approaching lean season is likely to drive a

significant deepening of food insecurity needs across Yemen in the short to medium term. With retaliatory strikes on port infrastructure increasingly likely, the reduction in import volumes already documented between October 2025 and March 2026 is likely to deepen, constraining the supply of food, fuel, and medical goods into DFA-controlled areas at a moment when household purchasing power is already reduced.

Retaliatory strikes causing port disruptions – including physical damage and insecurity around the port – would also compound health outcomes directly, as medical imports such as vaccines rely on the same supply chain as food, with cold-chain medicines particularly vulnerable to logistical delays given their dependence on simultaneous port and air access. These ports also handle 80% of Yemen's humanitarian cargo, reducing humanitarian responders' ability to respond rapidly to a significant increase in needs (OCHA 15/10/2024; Lloyd's List 16/05/2025; HRW 16/01/2025).

Fuel infrastructure and power plants

Yemen's fuel import infrastructure entered the current escalation in a severely degraded state. Previous Israeli strikes repeatedly targeted fuel storage facilities alongside port infrastructure: the July 2024 strikes on Al Hodeidah destroyed at least 29 of the port's 41 oil storage tanks, triggering fires that burnt for several days (HRW 19/08/2024). Subsequent strikes in September 2024 hit fuel tanks at Ras Issa that had already been damaged in the initial attack (AJ 29/09/2024). Following the July 2024 strikes, no fuel tanker has entered the Al Hodeidah port except a small quantity in October 2024, with fuel shipments diverted to Ras Issa as the key fuel import terminal for DFA-controlled areas (WFP 01/03/2025).

Fuel shortages directly constrain the functionality of water pumping systems, hospital generators, and food supply chains dependent on road transport, compounding deterioration across health, WASH, and food security simultaneously. During previous rounds of escalation, air strikes caused power outages, directly shutting neonatal units and dialysis centres in Al Hodeidah. September 2024 strikes on power stations in the area caused a complete city-wide power outage that lasted over four days, forcing sections of hospitals to temporarily cease operations (Mwatana 02/10/2024 and 20/07/2025). Further strikes on power generation infrastructure would hit a system already operating far below capacity, with no meaningful buffer to absorb

additional disruption. The health sector is funded at just 50% of its requirements, while the DFA's own revenue crisis has left public services unfunded since 2015, removing any governmental fallback (FTS OCHA accessed 30/03/2026; FEWS NET accessed 30/03/2026).

With 14.4 million people requiring WASH assistance nationwide in 2026 – the majority of whom are in DFA-controlled areas – the sector was funded at only 23% of its requirements by March 2026, leaving virtually no capacity to repair or maintain infrastructure damaged by further strikes (OCHA 18/03/2026; FTS accessed 30/03/2026). Water infrastructure is particularly exposed: pumping stations, treatment facilities, and distribution networks across DFA-controlled areas are heavily dependent on electricity, meaning that strikes on power stations translate rapidly into failures across the entire water supply chain. The consequences for disease transmission are immediate, as degraded water and sanitation conditions are primary drivers of cholera. The situation is of acute concern given Yemen's existing cholera burden: the country accounted for 35% of global cholera cases in 2024, the highest amount of any country globally (WHO 23/12/2024).

Sana'a International Airport

Sana'a International Airport presents a critical vulnerability in Yemen for humanitarian access, health infrastructure, and wider logistics. Previous rounds of air strikes by Israel in 2025 targeted the airport, degrading its infrastructure and grounding all flights in and out. These strikes caused an estimated USD 500 million in damage, with the airport repeatedly disrupted and operations still often halted at the end of March 2026 (AJ 07/05/2025; HRW accessed 30/03/2026; IBTimes 27/03/2026). Closure or further degradation of the airport would block the supply of temperature-sensitive materials such as vaccines and insulin, eliminate medical evacuation capacity, and close off another route for the entry of humanitarian aid. No viable alternative air cargo entry point exists for DFA-controlled areas, with other operational airports either situated across active front lines or too geographically remote to serve as a viable substitute, meaning that surge deployments and the rotation of humanitarian staff would also be affected (Al Mayadeen 20/11/2025; AJ 06/02/2026).

AGGRAVATING FACTORS

Humanitarian access: Yemen remains one of the most operationally constrained humanitarian environments globally, with an access index score of 5 on a 0–5 scale. This indicates severe and persistent barriers to humanitarian access, including insecurity incidents, checkpoints, and access denials that restrict movement across the country and are likely to worsen following potential escalations (ACAPS 10/02/2026).

Fragmented authority between rival administrations – including the DFA, IRG, and complex, overlapping government procedures – is significantly affecting humanitarian operations. In 2025, humanitarian organisations reported nearly 1,400 incidents of access and security-related obstacles affecting humanitarian operations throughout Yemen. These occurrences were primarily linked to hostilities, insecurity, movement restrictions, and delays in visa and work permit processing. Other hurdles include non-transferable and duplicative authorisation requirements, restrictions on needs assessments, and attempts to influence monitoring processes and recipient selection, which delay and undermine evidence-based aid distribution. Authorities may also impose lists or seek to redirect assistance towards populations perceived as aligned with their interests, increasing the risk of aid diversion and limiting needs-based delivery (OCHA 18/03/2026; Reuters 15/10/2025; UNSC 17/10/2025).

Humanitarian organisations could also face increased operational constraints and heightened protection risks for staff, such as movement restrictions, harassment, or even targeting during attacks, as has happened in similar contexts (MSF 30/03/2026). Potential military operations by Israel and the US against the DFA are likely to increase suspicion towards international humanitarian personnel and national staff in Yemen, particularly people perceived to be affiliated with those involved in the attacks. This erosion of trust could translate into higher incidences of harassment, arbitrary detention, and constraints on operational access (Xinhua 23/10/2025). During previous Israeli and US attacks between December 2023 and January 2025, the DFA detained at least 69 UN staff, accusing some of spying for the US and Israel (HRW 08/01/2026; AJ 18/12/2025). Such protection risks are likely to directly undermine humanitarian operations, potentially forcing organisations to reduce staff presence, suspend field activities, or scale back programmes in high-risk areas, limiting assistance delivery to affected populations.

Foreign Terrorist Organization designation: In January 2025, the US designation of the DFA as a Foreign Terrorist Organization had a measurable and damaging impact on humanitarian operations in Yemen, reducing funding and restricting operational space. The designation criminalised engagement with the DFA, chilled financial channels, and eroded trust. Humanitarian exemptions proved too narrow and unclear, failing to define what constitutes material support for the Houthis, and were banned. This left banks and NGOs uncertain about which activities might expose them to liability, forcing programme withdrawals and reducing operational presence. Financial institutions became reluctant to process transfers, leaving NGOs unable to sustain programmes, which led to a sharp decline in aid flows to DFA-controlled areas. The consequences were immediate and included the closure of 453 health facilities across 22 governorates as well as the suspension of nutritional programmes (OCHA 04/01/2026; AidData 31/10/2025; BBC 23/01/2025; Amnesty 10/04/2025).

Funding: Severe funding shortages have constrained humanitarian operations in Yemen, forcing the suspension of lifesaving assistance to millions of people, mostly in food assistance, displacement response, and health assistance. In 2025, less than 30% of the overall humanitarian response plan was funded – the lowest level in the decadelong crisis since the start of the conflict in 2015 (FTS accessed 30/03/2026; DI/Start Network 29/04/2015). Despite a 14% increase in the number of people in need, funding prospects in 2026 appear equally dire. By the end of March 2026, less than 10% of the plan was funded, which is likely to further constrain response capacity and leave many Yemenis without much-needed assistance (OCHA 18/03/2026; OCHA accessed 30/03/2026; WFP 29/03/2026). The funding gaps are likely to affect response capacity if the conflict escalates, mostly for communities that already experience high humanitarian needs and food deprivation, such as Abyan, Ad Dali', Al Jawf, Raymah, and Sa'dah governorates.