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Security Update: Yemen / Kingdom of Saudi Arabia (KSA)

Increased Houthi Activity and Escalation of the Iran Conflict

Executive Summary

The recent increase in Houthi missile, drone and port attacks should be assessed as a deliberate escalation by an Iranian-backed proxy operating within the wider Iran conflict, rather than as an isolated Yemeni civil-war development. Since mid-July 2026, the Houthis have moved from a relatively restrained posture under the informal 2022 de-escalation environment to renewed attacks against Saudi territory, Saudi-backed Yemeni government forces, Red Sea port infrastructure, and Saudi energy assets. The most recent activity included the Houthi-claimed drone attack against Saudi Aramco's Jazan refinery on 09 August 2026 and missile and drone attacks against the Yemeni Red Sea port city of Mocha, where Yemeni authorities reported seven people killed and severe damage to port infrastructure.



— Smoke plumes rising from Saudi Aramco's refinery complex and oil terminals in Jazan after coordinated Houthi strikes launched from Yemen in a satellite view on July 26. *Gallo Images / Orbital Horizon / Copernicus Sentinel Data 2026 via Getty Images file*

The escalation is directly connected to the wider Iran conflict because it coincides with continued Iranian pressure over the Strait of Hormuz and reported Iranian efforts to strengthen Houthi missile and drone capabilities. Reporting indicates that Iran transferred Islamic Revolutionary Guard Corps (IRGC) commanders, advisers and missile- and drone-related equipment to Yemen on a 13 July 2026 flight. It was also reported that Iran had asked the Houthis to prepare to close the Red Sea gateway at Bab el-Mandeb if the United States struck Iranian power infrastructure. If accurate, these developments indicate that Tehran views the Houthi front as a pressure mechanism against Saudi Arabia, Red Sea shipping and Western regional planning.

The threat is both land-based and maritime. On land, the Houthis retain the ability to strike Saudi border areas, Saudi-backed Yemeni government forces in Marib, Hadramout and Mocha, and Saudi energy infrastructure in Jazan and Yanbu. At sea, the Houthis do not need to physically control the Red Sea to

create operational disruption. Missile, drone and suspected anti-ship capability around Bab el-Mandeb, Hodeidah and the Gulf of Aden can raise insurance costs, disrupt port operations, and force commercial operators to reconsider routing. The Red Sea has become especially important because Saudi Arabia uses its western export routes to reduce exposure to the Strait of Hormuz.

The key caveat is sustainment. The Houthis remain dangerous because they already possess missiles, drones, trained operators, hardened launch areas and recent Iranian support. However, Iran's ability to sustain high-volume resupply may become increasingly constrained if sanctions, frozen assets, inflation, U.S. naval pressure and the cost of the wider conflict continue to degrade Tehran's financial and military logistics position. This does not remove the immediate Houthi threat, but it may limit the duration and scale of a prolonged campaign unless Iran has already pre-positioned sufficient weapons and technical support inside Yemen.

Background

The Houthi movement, also known as Ansar Allah, has controlled Yemen's capital, Sana'a, since 2014. The internationally recognised Yemeni government was forced into exile, and a Saudi-led coalition intervened in 2015 to restore that government. The conflict then developed into a prolonged proxy war in which the Houthis became the most capable Iranian-backed non-state actor on the Arabian Peninsula. The April 2022 de facto truce largely reduced major direct fighting between the Houthis and the Saudi-led coalition, although it did not resolve the underlying conflict.

That relative calm began to break down in July 2026. On 13 July 2026, the Houthis fired missiles toward Saudi Arabia after accusing the kingdom of bombing Sana'a airport. Saudi Arabia said it intercepted missiles launched toward its southern region, while Houthi military spokesperson Yahya Saree claimed the group targeted Abha International Airport. This was significant because it represented the first Houthi-claimed attack against Saudi Arabia since the informal truce took effect in 2022.

The timing is important. The Houthi escalation occurred while the wider Iran conflict was already disrupting the Strait of Hormuz. The United States and Israel had launched airstrikes against Iran on 28 February 2026, after which Iran closed Hormuz. Washington and Tehran later reached a ceasefire in June, but the United States reimposed a blockade on Iranian shipping in July, which Iran said violated the truce. This placed energy transit routes at the centre of the conflict and made the Red Sea a second strategic pressure point.

Events Leading to the Current Escalation

The first key step was the 13 July 2026 missile activity against Saudi Arabia. This broke the period of reduced direct Saudi-Houthi hostilities and signalled that the Houthis were willing to re-enter the conflict as part of Iran's wider regional pressure campaign. The same episode was linked to the attempted arrival of an Iranian aircraft in Yemen. Yemen's defence ministry said the runway at Sana'a International Airport had been targeted to prevent an Iranian aircraft from landing, while the aircraft later landed at Houthi-controlled Hodeidah.

The second key development came on 16 July 2026, when Iran reportedly asked the Houthis to stand ready to close the Red Sea oil route if the United States struck Iranian power infrastructure. A source close to the Houthis stated that the group had completed preparations to attack shipping by deploying missiles and drones near Bab el-Mandeb, in the Yemeni highlands overlooking Hodeidah and the Gulf of

Aden. The same reporting indicated that IRGC representatives already in Yemen would control the decision on when to close Bab el-Mandeb.

On 23 July 2026, when sources indicated Iran had flown IRGC commanders, military advisers and missile- and drone-related equipment into Yemen earlier that month. The reported flight from Tehran took place on 13 July 2026 and carried between 10 and 21 IRGC personnel, including senior commanders. Some of the cargo was reportedly linked to short- and medium-range missile and drone components similar to systems previously used against Saudi Arabia and the United Arab Emirates.

On 24–25 July 2026 there was a significant escalation against Saudi oil sites. Yemen's Iran-aligned Houthis fired on Saudi oil installations in Jazan and Yanbu. Houthi spokesperson Yahya Saree said the group struck Aramco sites in both locations. Video from Jazan showed a large column of smoke rising from the direction of the refinery, while Greek security sources said two ballistic missiles aimed at oil installations in Yanbu were intercepted by a U.S.-made Patriot battery operated in Saudi Arabia by the Greek military.

The Jazan attack had a direct operational effect. An industry note reported that Saudi Aramco shut down the 400,000 barrel-per-day Jazan refinery on 27 July 2026 after the Houthi attack, with damage reported to the Integrated Gasification Combined Cycle complex and tank farm area. Repairs and restart were tentatively expected by 15 August.

The attacks against Yemeni government forces and Saudi border areas on 06 August 2026 again increased tensions and risk the reopening of internal conflict. Houthi attacks in Marib and Hadramout killed at least 30 Yemeni government troops and wounded at least 50 others. Later the same day, Saudi military spokesperson Turki al-Malki said Houthi attacks wounded 11 civilians in Najran, including seven Saudi nationals, one Yemeni, two Egyptians and one Pakistani expatriate. Houthi Brigadier General Yahya Saree said the attacks on camps in Marib and Hadramout were carried out with ballistic missiles and drones.



Smoke rises during Houthi missile and drone strikes on the Red Sea port city of al-Makha (Mocha), Yemen, August 9, 2026 [Reuters]

The last and most recent development was the 09 August 2026 attack cycle against Mocha and Jazan. The Houthis claimed a drone attack against Saudi Aramco's Jazan refinery, while Saudi Arabia's energy ministry confirmed a fire at the refinery that was later extinguished with no injuries but did not publicly state the cause. In a separate statement, Yahya Saree said the Houthis carried out missile and drone strikes on Mocha, the government-held Red Sea port city near Bab el-Mandeb. Yemeni government sources said air defences were engaging drones launched toward the port's commercial quay and storage areas.

The Mocha attack occurred late Sunday night and was the second attack on the city in less than 24 hours. The Yemeni government-allied National Resistance Forces said at least seven people were killed, including four troops and three civilians, and 15 civilians were injured. Port buildings, piers, commercial goods and food supplies were damaged, while Yemeni military reporting stated that missiles landed in several areas, including near a television station.

Assessment of Houthi Intent

The Houthis are presenting the escalation as a response to Saudi actions in Yemen, including alleged Saudi air and sea blockade activity and reported strikes against Houthi-controlled infrastructure. However, the wider timing and pattern indicate that this is not only a Yemeni dispute. The attacks are occurring while Iran is pressuring the United States and Gulf states over Hormuz, sanctions, compensation, naval restrictions and the future of the regional ceasefire. Iranian officials have tied reopening Hormuz to U.S. concessions, including compensation, lifting sanctions, ending threats against Iran, ending aggression toward Iran's regional allies, and removing the U.S. naval blockade in the Gulf.

This makes the Houthi activity part of a broader Iranian coercive framework. Tehran is able to pressure one energy chokepoint directly through Hormuz and another indirectly through its Yemeni proxy network. The Houthis can threaten Bab el-Mandeb and the Red Sea without Iran needing to commit regular Iranian forces. This gives Iran deniability and escalation flexibility, while still increasing pressure on Saudi Arabia, the United States and commercial shipping markets.



The attack on Jazan is especially important because it targets Saudi energy resilience. Jazan is in southwestern Saudi Arabia near Yemen and processes around 400,000 barrels of crude oil per day. Yanbu, previously targeted, is Saudi Arabia's major Red Sea oil export hub. The operational message is clear: if Saudi Arabia shifts export activity away from Hormuz and toward the Red Sea, the Houthis can attempt to bring that alternative route under threat.

Land Threat

The land threat is centred on Saudi Arabia's southern border, Saudi-backed Yemeni government forces, and key government-held infrastructure in western Yemen. The Najran incident on 06 August shows that the Houthis can still affect civilian areas inside Saudi Arabia. The wounded included Saudi nationals and foreign expatriates, which gives the incident wider corporate and expatriate security relevance.

Inside Yemen, the Marib and Hadramout strikes demonstrate that the Houthis retain the ability to hit Saudi-backed military camps away from the immediate western coastal front. The reported casualty figures of at least 30 government troops killed and at least 50 wounded indicate that the Houthis are not only conducting symbolic attacks but are still capable of causing meaningful military attrition.

Mocha is the most operationally significant land target because it is both a port and a government-held logistics node. It has been renovated to support shipping that avoids Houthi-held Hodeidah, which makes it both an economic asset and a political symbol of the internationally recognised government's ability to operate on the Red Sea. By striking Mocha with missiles and drones, the Houthis are trying to degrade the government's Red Sea access, undermine public confidence, and signal that no alternative port structure is safe from attack.

Maritime Threat

The maritime threat is concentrated around Bab el-Mandeb, Mocha, Hodeidah, the Gulf of Aden and the Red Sea approaches to Saudi energy infrastructure. The Houthis do not need to close the Red Sea completely to generate strategic effect. The threat of drone, missile or suspected anti-ship attacks can increase war-risk insurance, delay vessel schedules, force route diversions, and disrupt confidence among shipowners and charterers.

A significant volume of Gulf oil had already been diverted to the Red Sea through Saudi infrastructure, and the waterway carries an important share of global energy supplies. This makes Red Sea security more important while Hormuz remains disrupted. If both Hormuz and Bab el-Mandeb are threatened at the same time, Saudi Arabia and other energy exporters face pressure on both their primary Gulf route and their western alternative route.

The Houthis' stated naval blockade against Saudi Arabia should not be interpreted as a conventional naval blockade. The Houthis do not possess a blue-water navy able to control the Red Sea in the traditional sense. Their strength lies in asymmetric denial: missiles, drones, coastal launch areas, intelligence from sympathetic networks, and the ability to create uncertainty over whether vessels calling at Saudi ports may later be targeted. This is sufficient to create commercial hesitation, even without full control of the maritime environment.

Houthi Capability and Iranian Support

The Houthis' current capability appears to rest on a combination of accumulated wartime experience, Iranian-supplied or Iranian-derived missile and drone systems, local adaptation, and external technical advice. Recent reporting suggests that Iran is still attempting to strengthen the Houthi threat. The 13 July flight reportedly carried IRGC commanders, advisers and missile- and drone-related equipment into Yemen. The cargo reportedly included components related to short- and medium-range missiles and drones similar to systems previously used in attacks against Saudi Arabia and the UAE.

The Houthis have demonstrated capability across several target sets: airports, Saudi border areas, oil infrastructure, Yemeni government military camps, port infrastructure and commercial maritime approaches. Their current strike pattern shows continued use of ballistic missiles, one-way attack drones and potentially anti-ship systems. The ability to launch salvos against Mocha while simultaneously claiming a drone strike against Jazan suggests a capacity for coordinated pressure across land, port and energy targets.

However, the sustainability of that capability is now a key issue. Iran is under pressure from sanctions, frozen assets, inflation, naval restrictions and the broader financial burden of the conflict. Iranian officials have demanded sanctions relief, release of frozen assets and compensation as part of any Hormuz reopening arrangement. That does not prove Iran can no longer support the Houthis, but it does indicate that Tehran's strategic finances are under pressure.

The likely result is a mixed picture. In the short term, the Houthis remain highly capable because they already have stockpiles, launch infrastructure, experienced personnel and recently reported technical reinforcement. Over the longer term, sustained high-tempo operations will depend on whether Iran can continue moving components, advisers and funding into Yemen despite regional surveillance, interdiction pressure and the economic strain of the wider conflict.

Impact

The immediate impact is the reactivation of Yemen as a serious front in the Iran conflict. The 2022 truce environment has not fully collapsed into open nationwide war, but the recent pattern is moving in that direction. The back-to-back attacks represent one of the most serious escalations since the April 2022 de facto truce, and the renewed Houthi activity threatens to aggravate energy and shipping disruptions already caused by the Iran conflict.

For Saudi Arabia, the impact is twofold. First, the kingdom again faces direct security pressure on its southern border and against its western energy infrastructure. Second, the attacks challenge Saudi Arabia's strategy of using Red Sea export routes as a partial workaround to Hormuz disruption. If Jazan, Yanbu, Mocha and Bab el-Mandeb remain exposed, Saudi Arabia's ability to reassure energy markets and shipping companies will be weakened.

For Yemen's internationally recognised government, the Mocha attacks are significant because they directly target a government-held port and associated commercial infrastructure. Damage to port buildings, piers, commercial goods and food supplies undermines civilian supply chains and the government's credibility in areas outside Houthi control.

For commercial shipping, the risk is not only direct attack but operational uncertainty. Even when ships are not hit, insurers, charterers, masters and port operators must account for the possibility of drones,

missiles, port strikes, unexploded ordnance, air defence activity and sudden rerouting. If the Houthis continue to target Mocha, Jazan, Yanbu or vessels linked to Saudi ports, the Red Sea may again become a high-cost transit environment.

For the wider Iran conflict, the Houthi escalation gives Tehran another lever. Iran can use Houthi activity to raise costs for Saudi Arabia and the United States while keeping the main U.S.-Iran negotiation track focused on Hormuz. This creates a two-chokepoint pressure strategy: Hormuz in the Gulf and Bab el-Mandeb in the Red Sea.

Adjacent Developments

The Saudi-Turkey-Pakistan defence pact is an important adjacent development. The 09 August Houthi attack on Jazan came two days after Saudi Arabia signed a defence pact with Turkey and Pakistan. The agreement states that an armed attack against any one of the three countries shall be regarded as an attack against all, while Pakistani Foreign Minister Ishaq Dar described the pact as purely defensive and Turkish Foreign Minister Hakan Fidan said it was not aimed at Iran or any other country.

The pact does not mean Pakistan or Turkey will automatically conduct combat operations against the Houthis. Analysts have cautioned against treating it as equivalent to NATO, despite the collective-defence provision. However, it increases the political weight of attacks on Saudi Arabia and may lead to expanded intelligence sharing, air-defence cooperation, logistics support, or deterrence messaging.

Another adjacent factor is the Hormuz negotiation track. Iran's insistence on U.S. concessions before reopening Hormuz means the Red Sea front may remain active while diplomacy continues. If Iran sees negotiations moving in its favour, it may restrain the Houthis to avoid provoking wider intervention. If talks stall or the United States or Israel conduct further major strikes, the Houthis are likely to be used again as an escalation tool.

Future Outlook

In the near term, further Houthi attacks are likely. The most probable targets are Saudi border areas, Saudi energy infrastructure in the southwest and on the Red Sea, Yemeni government military camps in Marib and Hadramout, Mocha port infrastructure, and vessels or port operations linked to Saudi maritime trade. The Houthis are likely to continue using ballistic missiles and drones because these systems give them reach, deniability, and the ability to create disruption without holding territory.

A sustained attempt to physically close Bab el-Mandeb remains less likely than periodic disruptive attacks. The Houthis can threaten the chokepoint, but continuous closure would require a tempo of operations and targeting accuracy that may be difficult to maintain under external pressure. The more likely scenario is intermittent attack cycles designed to raise insurance costs, delay shipping, and demonstrate that Saudi Arabia cannot fully bypass Hormuz through the Red Sea.

The risk of Saudi retaliation inside Yemen is increasing. Saudi Arabia may avoid a full return to the pre-2022 air campaign, but targeted strikes against launch sites, missile depots, drone storage facilities and Houthi coastal infrastructure are plausible if attacks continue. The internationally recognised Yemeni government has already claimed strikes against Houthi missile and drone launch sites and arms depots in Marib and al-Jawf.

Iran's ability to sustain Houthi operations will be a central variable. If Tehran's financial and logistics position continues to degrade, the Houthis may be pushed toward more selective, symbolic or high-impact attacks rather than a continuous campaign. However, if recent IRGC and equipment transfers were substantial, the Houthis may already have enough capability inside Yemen to sustain several weeks of elevated pressure even without immediate resupply.

The most likely outlook is therefore continued, calibrated escalation. The Houthis will remain active enough to keep Saudi Arabia and Red Sea shipping under pressure, but they are unlikely to seek a full-scale conventional war unless Iran directs a broader regional escalation or the Yemen front spirals through retaliation. The current pattern should be treated as an Iranian-backed proxy campaign intended to widen the conflict, stress Saudi energy resilience, and complicate any U.S.-Iran settlement around Hormuz.

Source Note: This report is based on reporting from Reuters and Associated Press, supported by regional and energy-sector reporting where relevant. Source attribution has been limited within the body of the report to preserve analytical flow. Key referenced events include the 13 July 2026 Houthi missile activity toward Saudi Arabia, the reported Iranian support flight to Yemen, the 24–25 July attacks against Jazan and Yanbu, the 06 August attacks in Marib, Hadramout and Najran, and the 09 August attacks against Mocha and Jazan.