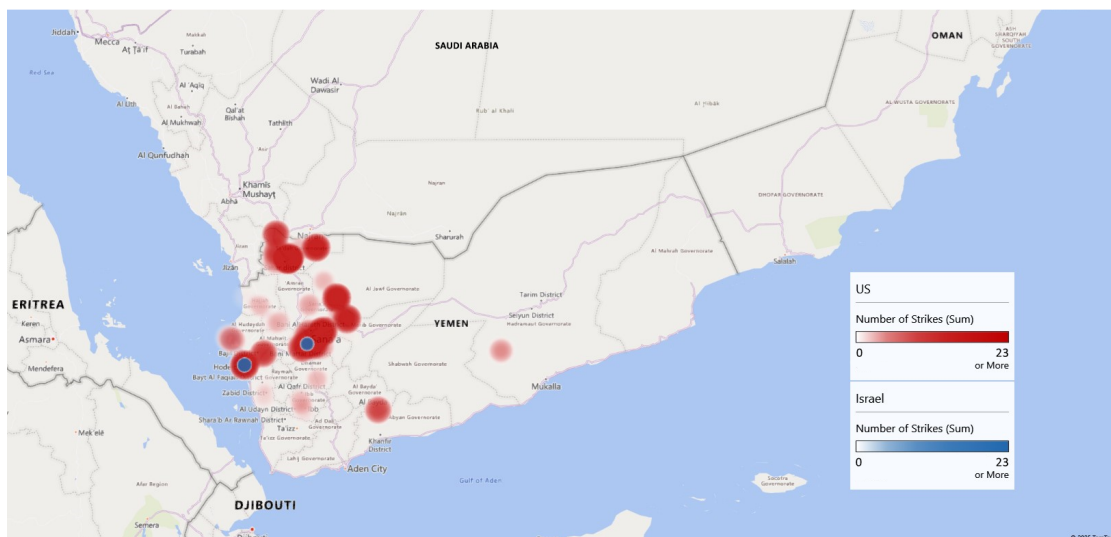


Ari Cicurel  
*Associate Director of Foreign Policy*

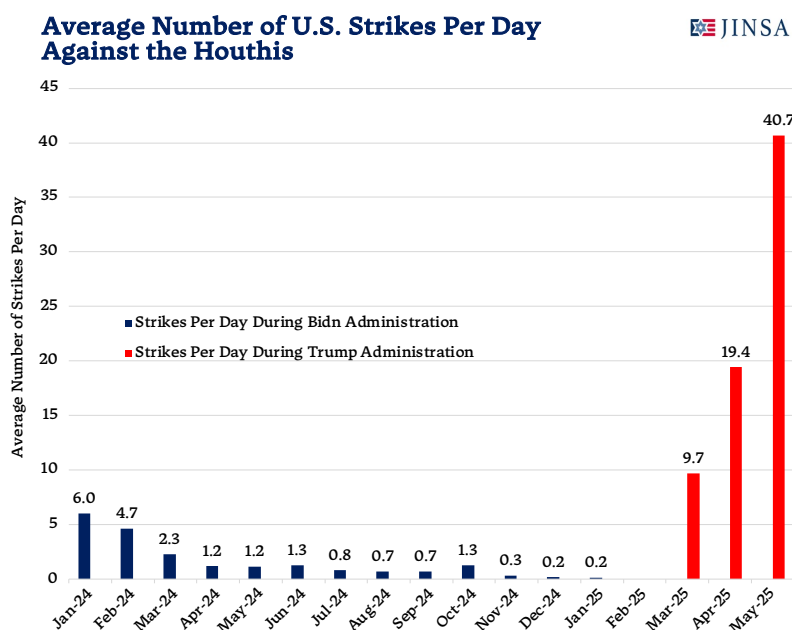


- Reports indicating that Iran [exerted pressure](#) on the Houthis to end their fire, to help further nuclear talks, suggest that U.S. strikes helped build diplomatic leverage with Tehran, but by reaching an agreement with the Houthis, the Trump administration has conceded that advantage before achieving any concessions from Iran.
- » However, it still remains unclear that the Houthis agreed to a deal, with Mohammed Ali al Houthi, a member of the Houthi Supreme Political Council, [claiming](#) on May 7 that Trump’s announcement will be “evaluated on the ground first.”
- » The announced agreement does not mention a cessation of Houthi attacks on Israel and Houthi statements have vowed to continue targeting Israeli ships, which could be enough of a threat to keep commercial shipping out of the Red Sea, despite the deal.
  - Since the Houthis have frequently claimed its attacks were against ships with ties to Israel—despite those vessels having tenuous or no apparent connection to Israel—the Houthis’ pledge raises doubts about whether the agreement with the United States will effectively end attacks against ships.
  - This also raises the prospect of repeated Israeli strikes on the Houthis and questions about U.S. support for such operations.
  - The Houthis have not targeted commercial shipping vessels since December 2024, but its capability to resume these attacks and lack of clarity about who it would be willing to fire upon may cause international shipping companies to be wary of sailing through the Red Sea, undermining the U.S. objective of restoring freedom of navigation.
- » It is also unclear whether the Trump administration would be willing to restart the U.S. campaign against the Houthis—and to what level of intensity—if the terrorist group continues its attacks, whether on Israel or commercial shipping.
- » Without persistent strikes against the Houthis, the Trump administration may soon redeploy U.S. aircraft and aircraft carriers away from the region, enabling them to serve key functions across the globe, but decreasing deterrence against the Houthis and Iran.
  - These U.S. assets also helped intercept missile and UAV attacks targeting Israel, if they depart and Houthi attacks against Israel continue, Israel will have to devote more assets to defending against them.
- The Biden administration’s [intermittent](#) strikes against the Houthis were ineffective at deterring further Houthi attacks because they were too infrequent, [defensive](#), focused on avoiding escalation, and primarily targeted launchpads and weapons stores. The Trump administration’s strikes, in contrast to Biden-era strikes, were larger, more frequent, and directed at higher value targets.
  - » While the Biden administration focused on targeting Houthi launchpads and weapons storage facilities, U.S. strikes during the Trump administration neutralized Houthi [leaders](#), Islamic Revolutionary Guard Corps (IRGC) officers, communication networks, and weapons manufacturing infrastructure.
    - Crucially, the U.S. [campaign](#) that began on March 15 [hit critical locations](#) for revenue generation and weapons acquisition from Iran, notably oil refineries, the Hodeidah Port, and Sanaa International Airport, as well as sites near the frontlines between Houthi and counter-Houthi forces.
  - » In the seven weeks since March 15, the United States launched roughly 1,207 strikes, some 60 percent more than during the 13 months of Biden administration operations.

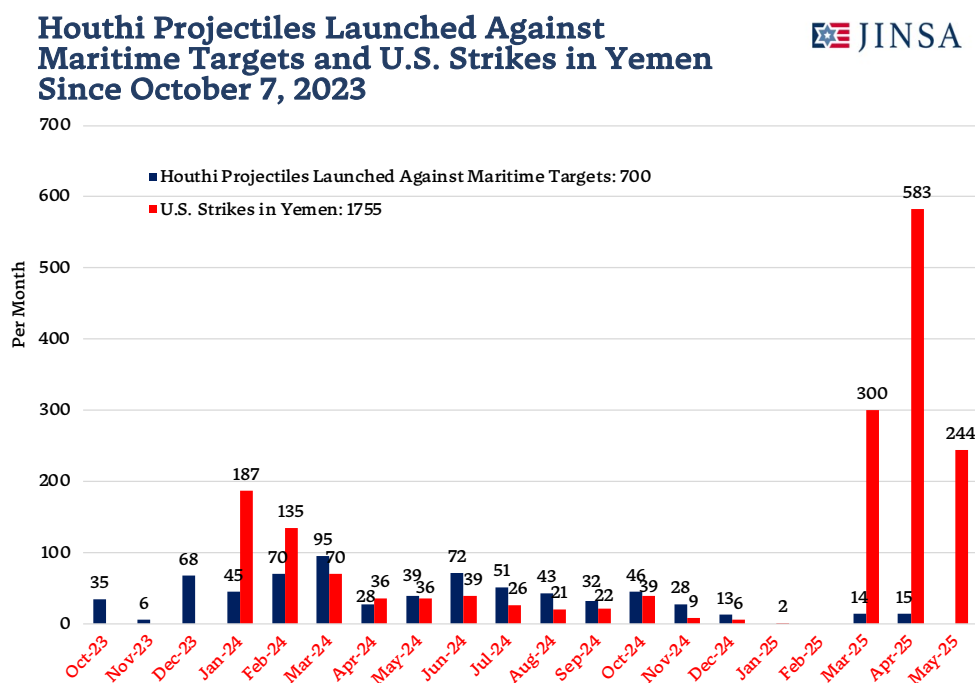
- » Israeli strikes in Yemen on May 5 and 6, which were immediately followed by the Houthis' agreement to stop their attacks on shipping, similarly focused on undermining the Houthis' ability to generate revenue by targeting the Hodeidah Port and disabling the Sanna airport.
  - The Houthis may have feared these attacks previewed a larger, more persistent Israeli campaign against them.
- Despite achieving an apparent Houthi agreement to cease attacks on commercial maritime traffic, the Trump administration fell short of the maximalist goals set out in its public rhetoric: military defeat of the Houthis and holding their patron, Iran, accountable.
  - » The campaign that began on March 15 fell far short of Trump's [claim](#) in his March 19 Truth Social post that the Houthis "will be completely annihilated!"
  - » On March 17, Trump [posted on Truth Social](#) that "every shot fired by the Houthis will be looked upon, from this point forward, as being a shot fired from the weapons and leadership of IRAN, and IRAN will be held responsible, and suffer the consequences, and those consequences will be dire!"
    - The Houthis fired at least 62 "shots" against U.S. and Israeli targets since that post.
- The increased tempo and more aggressive targeting of U.S. strikes notwithstanding, until the truce, the Houthis had been demonstrating greater capabilities to impose significant costs on the United States and Israel.
  - » Without substantial intelligence assets on the ground in Yemen, the United States relied upon unmanned aerial vehicles (UAVs) for reconnaissance, but the Houthis have downed seven U.S. MQ-9 UAVs since March 15 that each cost \$30 million.
  - » On April 28, the U.S. Navy [lost a F/A-18 fighter jet](#) that cost at least \$60 million and a tow tractor onboard the USS *Harry S. Truman* after the ship conducted evasive maneuvers to avoid a Houthi attack that combined ballistic missiles, cruise missiles, and UAVs.
    - Even though all of the Houthi projectiles missed the *Truman*, the terrorist group demonstrated the capability to launch a combined missile and UAV attack that imposed a substantial financial cost on the United States.
    - On May 6, a [second F/A-18 fighter jet](#) that had been aboard the *Truman* was lost at sea, with the early assessment indicating that the aircraft's tailhook failed to slow down the jet as it landed.
  - » An Israeli Arrow air defense interceptor and then a U.S. Terminal High Altitude Area Defense (THAAD) interceptor [failed](#) to neutralize the Houthi missile that struck Tel Aviv's Ben Gurion Airport on May 4, leading to the Yemeni terrorist group's [first successful strike](#) against the Israeli airport that injured six people.
- These Houthi successes imposed greater costs on an already costly U.S. operation relative to the cheap weapons the Houthis fired.
  - » The first three weeks of the U.S. campaign alone [reportedly](#) cost nearly \$1 billion, including \$200 million of munitions.
  - » In comparison, the Houthis have launched missiles and drones that cost only tens of [thousands of dollars](#).

## 2. Charts and Trends

- The United States launched at least 1,207 strikes since March 15 against Houthi targets in Yemen, compared to only 628 in the 14 months beforehand, a 92 percent increase.
  - » The United States substantially expanded the size of its operations during the first week of May 2025, by launching roughly 110 percent more strikes per day than it had during April.
  - The United States launched an average of 40.7 strikes per day from May 1-6, compared to the 19.4 strikes per day in April and 18.75 strikes per day during the second half of March when the U.S. campaign began.

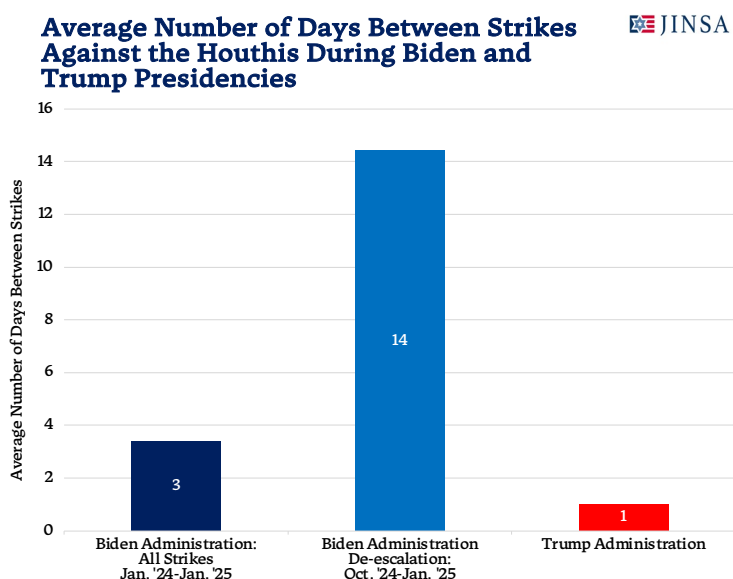


- » The United States launched 244 strikes against the Houthis during only the first five days of May, compared to 583 strikes throughout all of April and 300 strikes during the second half of March.

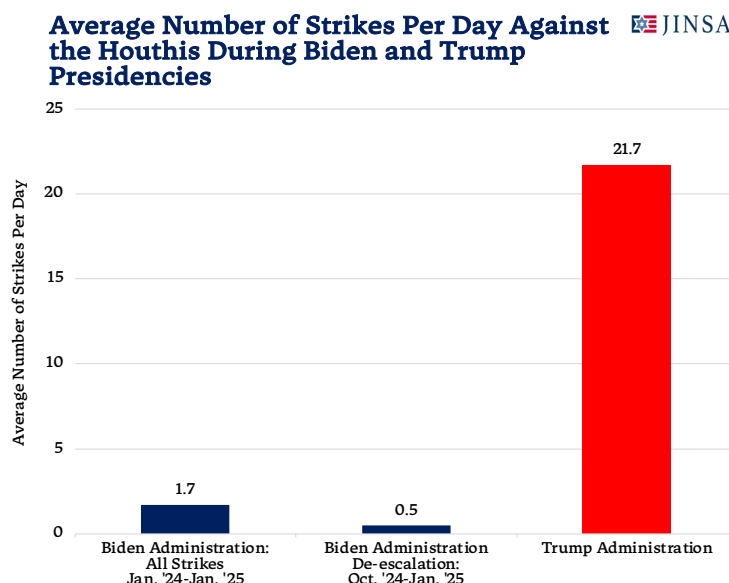


- The Trump administration conducted attacks against the Houthis every day from the beginning of the campaign on March 15 until May 5, compared to the Biden administration launching operations an average of once every three days, a 66 percent increase in tempo.
  - » The Trump administration launched 1,200 percent more strikes per day once it began targeting the Houthis compared to the period when the Biden administration conducted strikes against the group in Yemen.
    - The Trump administration launched 21.7 strikes per day from March 15 to May 5, 2025, up from the 1.7 strikes per day that the Biden administration conducted from January 12, 2024 to January 8, 2025 and an even further increase compared to the 0.5 strikes per day from October 2024 to January 2025.

**Average Number of Days Between Strikes Against the Houthis During Biden and Trump Presidencies**

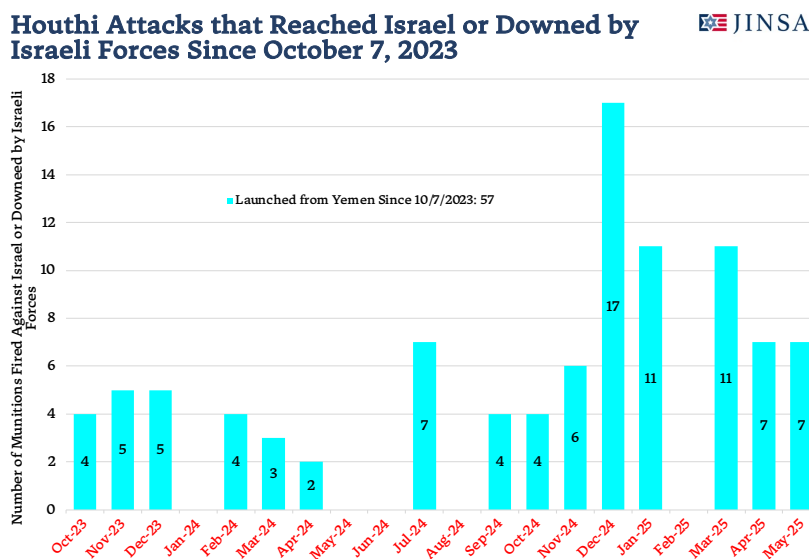


**Average Number of Strikes Per Day Against the Houthis During Biden and Trump Presidencies**



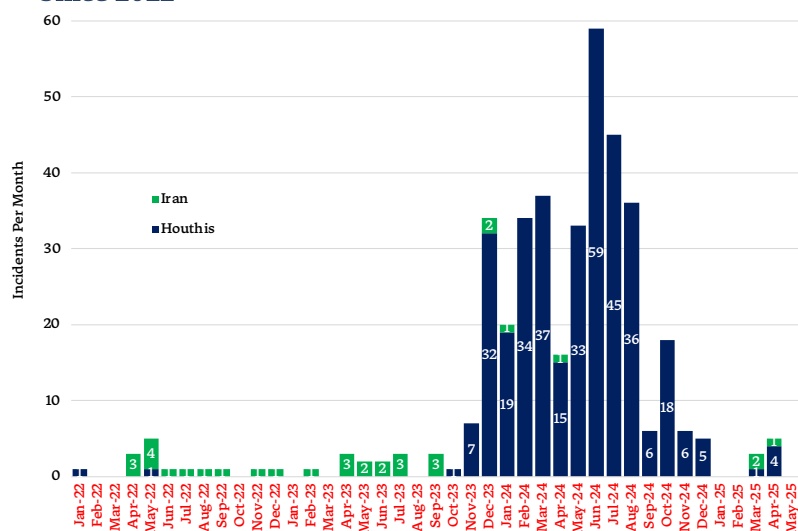
- The Houthis have, so far, fired seven projectiles in May that reached Israel or were downed by Israeli forces, the same amount as in April, and are on pace to roughly double the previous peak monthly total of 17 projectiles during December 2024.
  - » Since U.S. and Israeli forces intercept numerous Houthi projectiles over the Red Sea before they near their targets, incidents recorded as maritime attacks may have been targeting Israel, making the total number of attacks against Israel higher.

**Houthi Attacks that Reached Israel or Downed by Israeli Forces Since October 7, 2023**



- The Houthis launched 300 percent more attacks against maritime targets during April compared to March, after launching no attacks since December 2024.
  - » The Houthis launched four attacks in April, with three against U.S. Navy ships and one against a French ship, compared to only one attack during March (Iran also seized one commercial ship in April and two commercial ships in March).
  - » The Houthis have launched at least 692 projectiles against maritime targets since the Iran-backed terrorist group began their escalation in October 2023.

**Iran-linked Maritime Aggression Incidents Since 2022**



**Types of Iran-linked Maritime Aggression Incidents Since 2022**

