All Is Not Quiet on the Houthi Front

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Iran and the Houthis are on the verge of being able to effectively throttle commercial shipping through a second key chokepoint waterway in the Middle East. This week, the Iran-backed Houthis in Yemen seized the strategic port city of Mocha and Perim Island at the mouth of the Bab el-Mandeb Strait, the narrow waterway between Yemen and Djibouti that forms the southern gateway to the Red Sea.

The Houthi advance gives it positions along the Red Sea that pose an even more dangerous threat to shipping than Iran's position along the Strait of Hormuz, providing close-range, direct line of sight to ships entering and exiting the Red Sea—as well as the oil infrastructure that allows oil to be diverted away from the Strait and to the Red Sea port of Yanbu. This position allows the Houthis to attack vessels and energy infrastructure with mines, drones, ballistic and cruise missiles, or even relatively low-cost weapons such as anti-tank guided missiles and artillery, making disruption easier and cheaper while complicating efforts to defend maritime traffic. On September 11, Saudi Arabia shut down its East-West crude oil pipeline after multiple attacks against it.

With U.S. forces focused in and around the Gulf of Oman enforcing the blockade on and countering strikes from Iran, Washington should lean on its partners to serve as the primary forces in rolling back the Houthis' ability to endanger the Red Sea and control territory in Yemen. However, the main partners most interested in and best able to carry out such operations—primarily Saudi Arabia and Israel but also the United Arab Emirates—have seen relations deteriorate recently. It is important that the United States serve a convening function to develop a campaign and convince and coordinate its partners in carrying it out. This should include interdicting Iranian weapons transfers, disrupting IRGC targeting support for the Houthis, and striking Houthi personnel, infrastructure, weapons storage, and coastal firing positions.

The Houthi Advance

The Houthis rapidly expanded their grip on Yemen's Red Sea coast this week as they now hold both the mainland overlooking the waterway and an island inside it. On September 10, they routed Saudi-backed government forces and seized Mocha, a historic port on Yemen's southwestern coast and the last major Red Sea harbor held by the country's internationally recognized government, along with the Hanish Islands in the southern Red Sea. The next day, they took Dhubab, a coastal town sitting directly on the Bab el-Mandeb Strait, and moved onto Perim Island within the Strait itself after government forces withdrew.

Houthi control of Perim Island poses an even more dangerous posture for shipping than the Iranian position along the Strait of Hormuz. From the island at the mouth of the Red Sea, the Houthis can deploy mines and fire at very close range at passing ships that would have no ability to avoid direct line of sight with the group's weapons. A few well-placed mines could block passage through the narrow waterway, and even the fear of hitting mines might be enough to deter shipping traffic. This vantage point would enable the Houthis to target ships not only with drones, ballistic missiles, and cruise missiles but even with anti-tank guided missiles or artillery fire. In contrast, Iran needs radar and drones or missiles with anti-ship capabilities to hit targets. The Houthis' strategic positions make it much easier for the group to disrupt traffic through the Red Sea and at much lower cost, undermining the ability of military forces to effectively defend against potential attacks.

The advance marks the most serious escalation in Yemen since the 2022 ceasefire. ACLED, a conflict-monitoring group, recorded at least 276 deaths from fighting between Houthi and government-aligned forces between September 3 and 7, while the Houthis simultaneously intensified missile and drone attacks against Saudi Arabia. Brent crude oil has already climbed above $105 a barrel as Mocha fell, and prices were set to close the week above $100 a barrel for the first time since May.

A New Red Sea Front

Iran is exploiting the Houthi offensive, and in important respects directing it, to open another front in its war with the United States. While the Houthis remain the most independent of Iran's partner militias, Reuters, citing regional sources, reported that the group's recent advance came with direct guidance from the Islamic Revolutionary Guard Corps (IRGC) as Iran sought to open a new front against the United States. Tehran told the Houthis last week to escalate against Saudi Arabia and promised additional funding, weapons, and senior officers in return. Several IRGC commanders had already traveled to Yemen, and Yemeni military sources attributed the campaign's direction to Abdolreza Shahlaei, a commander in the Quds Force, the IRGC branch that runs Iran's operations abroad.

While the Houthis have their own interests and objectives, which include, according to diplomatic sources, extracting economic concessions from Saudi Arabia and potentially placing a toll on Red Sea shipping modeled on Iran's tolling ambitions in Hormuz, these aims align closely with Iran's. The Houthis already began translating those aims into action in July when the group declared a blockade on Saudi shipping through the Red Sea. The Houthis continued control over the coast will create uncertainty about freedom of navigation through the Red Sea, driving up oil prices and demonstrating that even Iran's partners can impose global costs.

Importance of the Red Sea

Iran's closure of the Strait of Hormuz strained the global economy, but Saudi Arabia was able to mitigate some of the economic consequences by rerouting oil to the Red Sea. After Hormuz shut, Saudi Aramco pushed more crude through the East-West pipeline, which crosses the kingdom from the oil fields of the Eastern Province to the Red Sea port of Yanbu and can carry roughly 7 million barrels per day at full capacity. It also routed more oil through Egypt's SUMED pipeline, which bypasses the Suez Canal and whose flows rose from 650,000 barrels per day in June to over 1.9 million in August.

With the Houthi advances, the potential ability to leverage this cushion of alternative export capacity along the Red Sea could soon disappear. A closure of that corridor would leave Saudi Arabia and the global market without a readily available alternative, which would hand Iran the compounding leverage it has sought from the start. The Houthis have already struck tankers on the Red Sea route, including a Saudi vessel near its northern end, far from the group's traditional launch areas, and projectiles fired by Iranian proxies in Iraq hit the East-West pipeline on September 11, leading Riyadh to shut down the pipeline. From their new positions at the mouth of the Bab el-Mandeb, the Houthis can now throttle the southern entrance to the very corridor Saudi Arabia turned to when Hormuz closed.

Houthis Outlasted Previous Campaigns

The United States, Israel, and Saudi Arabia have all fought against the Houthis, but at no point have the three coordinated a unified military action. Saudi Arabia has conducted strikes on the northern front and has received intelligence and targeting support from more than 100 American advisers on its soil, but it has kept its distance from Israel, whose 2025 air campaign killed much of the Houthi senior leadership and gave it the most developed targeting picture of the group of any actor in the region. Israel, for its part, has signaled a willingness to join a broader effort as the Houthi offensive expanded.

However, the previous Saudi- and Emirati-led coalition fractured, with the split between these two nations driving a wedge within the anti-Houthi camp. Riyadh has sought to consolidate previously U.A.E.-backed forces under its command even as units, such as the U.A.E.-aligned Giants Brigade, have continued fighting the Houthi advance along the Red Sea coast.

Washington is the only actor able to force that coordination into a unified framework. Left as they are, Saudi airpower, Israeli intelligence and strike experience, and U.S. enabling support will keep being spent at a fraction of their combined value while the Houthis dig in.

The Window Is Closing Fast

Delaying a strong response to the Houthi offensive risks allowing the group to entrench its position along the coast, making it more difficult to remove them. The last time Washington delayed, it needed a 52-day air campaign built around two aircraft carrier strike groups and costing more than $1 billion, launched 16 months after the Red Sea disruption began, merely to secure a limited Houthi pledge to stop firing. The same logic applies now, on a shorter fuse. The Houthis advanced down an open coastal plain against little air opposition and now hold the high ground over the Bab el-Mandeb, from which they can see and strike passing ships. Dislodging the Houthis from their captured positions will be far harder than stopping them would have been, not least because the United States keeps no comparable military presence at the southern end of the Red Sea. And where there is a presence—on the African coast in Djibouti—the local Djiboutian government denies offensive operations against the Houthis. President Trump has so far declined Saudi requests to strike the Houthis directly.

What the United States Should Do Next

The United States should convene its partners to develop a coordinated campaign against the Houthis alongside its regional and European partners. Saudi Arabia can provide proximity, airpower, and forces already engaged in a campaign against Yemen. Israel has one of the region's deepest recent targeting experience against Houthi leadership and military infrastructure, as its 2025 air campaign killed more than a dozen senior officials, with the most notable being the August 2025 strike on the group's leadership, killing its chief of staff, prime minister, and other ministers. The United States has the relationships with Israel and Arab nations necessary to coordinate a multinational effort. Washington should use those advantages to establish a common operational picture, divide targeting responsibilities, and coordinate strike planning.

That framework should support a sustained campaign designed to deny the Houthis the ability to consolidate their new positions around the Bab el-Mandeb Strait. Initial strike packages should focus on the coastal launchers, radars, surveillance systems, and staging areas the Houthis need to threaten shipping from their new positions in and around Mocha, Dhubab, and Perim. Follow-on strikes should reach deeper into Yemen against command-and-control nodes, weapons-production and storage facilities, and senior leaders responsible for maritime attacks. Israel's experience targeting Houthi leadership and infrastructure should inform that campaign, while U.S. support can help Saudi and Israeli operations draw from the same intelligence and targeting picture.

As part of this effort, Washington should facilitate dialogues between Saudi and Emirati officials to alleviate tensions between them and encourage the U.A.E. to reengage its forces in Yemen, with an emphasis on amphibious operations on coastal areas and supporting local forces to retake Houthi controlled territory. The United States should organize regional partners to interdict Iranian weapons, personnel, and dual-use materiel moving into Houthi-controlled Yemen, as well as pursue preemptive counter-mine efforts to prevent the Houthis from mining the Bab el-Mandeb Strait.