

National Context

The Houthis are positioning themselves as a leading voice in pro-Palestinian resistance, hosting a high-profile conference in Sana'a on 22 March attended by regional figures including former Iraqi PM Adel Abdul Mahdi. While the event aimed to showcase solidarity, Yemen's Information Minister accused the group of using key ports and airports to smuggle weapons with Iranian support. Houthi missile strikes on Israel and US forces on 23 March—featuring a hypersonic launch—reflect escalating ambitions and deeper ties to Iran's Axis of Resistance. Tehran continues to provide strategic backing while publicly distancing itself. Meanwhile, shifting dynamics have seen RSF fighters—previously deployed in Yemen—return to Sudan, reportedly via UAE support. Intensified US airstrikes on Houthi sites, including statements from former President Trump, reinforce Yemen's growing role in regional confrontation.

Regional Recap

In Aden, STC forces abducted rival Southern Movement leader Khaled al-Humayqani, exposing deepening internal rifts. In the east, Omani border officials intercepted 800 Chinese drones, heightening concerns about cross-border arms smuggling. On 20 March, the Houthis fired a hypersonic missile at Tel Aviv, triggering Israeli interceptions and renewed US retaliatory strikes on targets in Sana'a and Sa'ada. Houthi media reported civilian casualties, including at hospitals. Concurrently, attacks on US naval forces in the Red Sea led to expanded CENTCOM operations and strikes on Houthi logistics. The group has tightened internal security in response to the threat of further attacks and intelligence leaks.

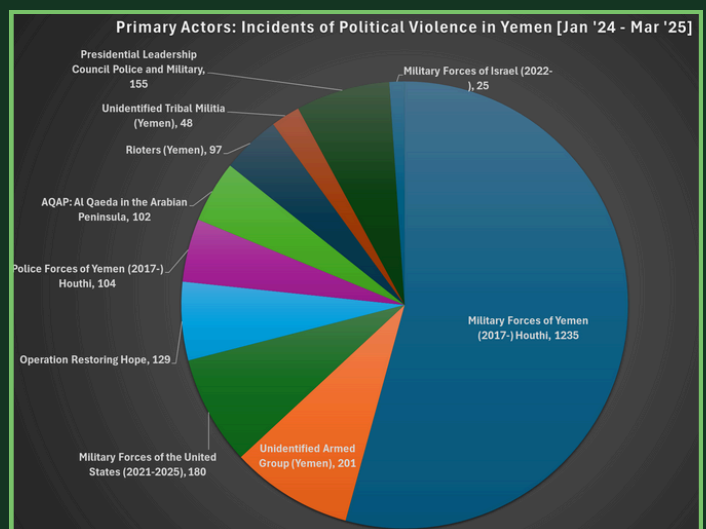
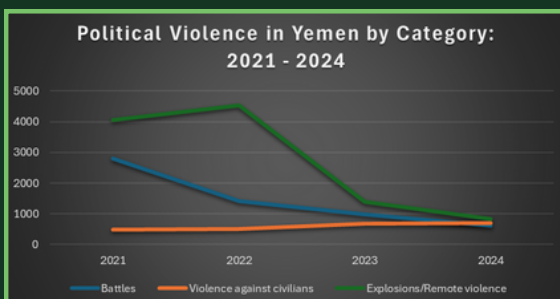
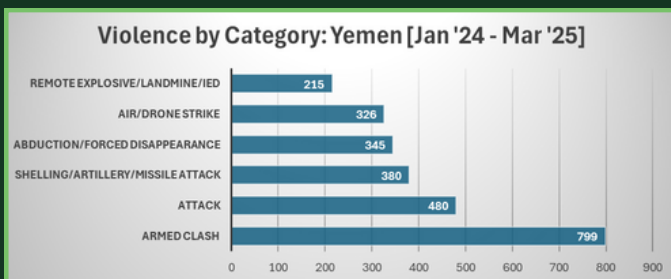
Humanitarian situation

Yemen's humanitarian crisis continues to deepen amid conflict and collapsing infrastructure. US airstrikes on Houthi areas have heightened fears of wider destabilisation, while UN agencies warn of worsening conditions in Red Sea corridors. Severe malnutrition is rising, particularly in Hudaydah, where UNICEF reports child hunger at near-catastrophic levels. Aid cuts and economic collapse have left half of children under five and 1.4 million pregnant or lactating women malnourished. MSF reports overwhelmed clinics, and UNICEF's 75% funding shortfall signals further deterioration. Millions remain dependent on strained aid pipelines, with no immediate relief in sight.

- Access will likely deteriorate further: Intensifying airstrikes and military build-up in northern Yemen, particularly in Sana'a, Sa'ada, and Hudaydah, are highly likely to restrict humanitarian access and operational presence.
- Aid supply chains at risk: Red Sea instability and port-targeting fears are a realistic threat to Yemen's already fragile import routes, jeopardizing the inflow of food, medicine, and fuel essential for aid delivery.
- Healthcare system on the verge of collapse: Reports from MSF and UNICEF confirm overstretched clinics and treatment centres, with insufficient funding to scale services as malnutrition and disease surge.
- Humanitarian funding shortfall will almost certainly worsen: With a 75% gap in UNICEF's appeal, there's a near certainty that lifesaving interventions—particularly for children and pregnant women—will be cut or delayed.
- Smuggling and dual-use facilities raise targeting risks: Allegations of Houthi use of civilian infrastructure for arms transport may lead to strikes on aid-critical facilities like Hudaydah port, further compounding operational challenges.
- Displacement and needs will surge: Escalating violence and political fragmentation will likely cause new displacement waves, straining already overstretched humanitarian programming and response capacity.

Dynamic assessment

Military escalation is likely to intensify, worsening Yemen's humanitarian emergency. Tensions within southern factions risk igniting further unrest in Aden, while northern missile strikes by the Houthis are expected to prompt more US and allied retaliatory action. Aid delivery will likely be disrupted by ongoing hostilities, particularly in Sana'a, Sa'ada, and Hudaydah, where infrastructure damage and fuel shortages are already critical. Red Sea militarisation also threatens imports of essential goods. The Houthis' dual use of civilian facilities for smuggling may invite further airstrikes, while diplomatic efforts to de-escalate remain unlikely to yield results in the near term. Donor fatigue and competing crises may limit funding, leaving millions facing famine, disease, and displacement without urgent international response.



Graphical Intelligence Summary (GRINTSUM)

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