Houthis seize control of the Red Sea, threatening Saudi oil production and a wider war

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Amid renewed fighting with the Saudi-backed Yemen government, the Houthis have seized territory along Yemen's Red Sea coast and several strategic islands, giving them control of the approaches to the Bab al-Mandeb Strait.

The narrow waterway linking the Red Sea with the Gulf of Aden and the Indian Ocean carries 12 percent of maritime world trade. With the Strait of Hormuz closed, this threatens Saudi Arabia's alternative oil-export route and risks deepening an already severe global oil crisis. It portends the opening of another front in the wider regional war between the US-Israeli bloc and Iran.

Within days of the Houthis' rapid offensive, launched on September 4 against the internationally recognised, Saudi-backed Yemen government, based in Aden, the Iran-aligned Shia group had seized six districts across Taiz and Hodeidah governorates, the port cities of Mocha and Dhubab, and several islands in the Red Sea, including Perim. This has given the Houthis control of virtually the entire western coast of Yemen and the strategically crucial approaches to Bab al-Mandeb. The Houthis have launched dozens of ballistic missiles and drones at King Khalid Air Base in Khamis Mushait in southwest Saudi Arabia in response to more than 300 Saudi airstrikes across Yemen in five days.

As the commercial shipping lane through Bab al-Mandeb is only about two miles wide at Perim, the Houthis do not need a large naval force to threaten shipping: their control of the coast and islands gives them the ability to impose a veto over vessels using the strait, particularly Saudi ships. They have already declared the strait "safe for all companies except Saudi ships".

The closure of the Strait of Hormuz made the Bab al-Mandeb route, through which just one million barrels a day of oil flowed prior to the US-Israeli war on Iran, vital to Saudi Arabia's oil exports to Asia. This month, following the resumption of hostilities, Saudi Arabia has been shipping just 120,000 barrels a day from its Red Sea ports, compared with around 3.5 million barrels in August and 5 million earlier during the US-Israeli war against Iran.

Once the world's largest oil exporter, Saudi Arabia—bereft of its shipping routes--is now producing just 6.2 million barrels a day, down from around 11 million barrels, its lowest level for decades, largely for the domestic market. It is now shipping far less oil than the US.

The Houthis' seizure of the Red Sea coast therefore strikes at the heart of Saudi Arabia's remaining capacity to export oil. This will intensify the global oil crisis. Brent crude has risen to around $107 a barrel after earlier reaching almost $110.

Saudi oil is under attack from elsewhere. On September 10, Iran-aligned forces in Iraq launched drone attacks on the 745-mile Saudi pipeline linking Abqaiq near the Gulf to Yanbu on the Red Sea. The pipeline was built in 1981 to provide an alternative to Hormuz. Saudi Arabia has now closed it, potentially threatening up to 4 percent of global oil supply. The Iraqi government confirmed that the attacks were launched from its territory, although no group claimed responsibility, and dismissed the commander in charge of Maysan province, from which the drones were launched.

The Houthis can take advantage of their wider strategic leverage over Saudi Arabia, energy markets and the US confrontation with Iran to meet their own, narrower objectives. Iran and its allies can put pressure on both sides of the Gulf's alternative energy routes.

Tehran and the Houthis are also aware of the political leverage created by the US midterm elections amid an increasingly unpopular war against Iran that is roiling financial markets.

The present conflict follows the collapse of the fragile 2022 UN-brokered truce that effectively partitioned Yemen. Hostilities resumed two months ago after Saudi Arabia blocked an Iranian plane from landing at Sana'a airport on July 12, despite protests from the Yemeni government. The Houthis responded by declaring a naval blockade of Saudi Arabia in the Red Sea and attacking Saudi vessels. Saudi

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Arabia subsequently deployed forces along its southwestern border with Yemen and launched hundreds of airstrikes against the Houthis.

The Houthis' campaign is aimed primarily at forcing concessions from Saudi Arabia and expanding their power in Yemen. Their demands include an end to Saudi military operations, the lifting of the blockade on Houthi-controlled ports and airports, payment of Houthi civil servants whose salaries have not been paid in full since 2018, and reparations for Yemeni civilians who suffered during the war.

Yemen's civil war began in 2014, when the Houthis seized Sana'a following mass protests against President Abdrabbuh Mansur Hadi, forcing him to flee to Aden. In 2015 Saudi Arabia and the UAE intervened militarily within a broader, fractious coalition in a brutal but unsuccessful attempt to drive the Houthis from power and restore Hadi.

The Houthis were subjected to a ruthless assault by Saudi Arabia and its allies, armed and financed by the United States. According to the United Nations, 377,000 people were killed during the war, which involved blockades that contributed to mass starvation and disease. Under the Obama and first Trump administrations, the US provided more than $54 billion in military equipment, with Britain and other imperialist allies supporting the intervention. The 2022 UN-brokered ceasefire confirmed the country's division between government- and Houthi-held areas.

The US continued attacking the Houthis after the ceasefire. US airstrikes against Yemen from late 2023 to mid-2025 killed 213 civilians, according to research by Brown University's Costs of War Project. President Biden began airstrikes in October 2023 after Houthi attacks on a US Navy destroyer, launched in retaliation for US support for Israel's genocidal war against the Palestinians. The attacks forced shipping to take the much longer route around southern Africa. US airstrikes resumed under Trump in March 2025 in response to Houthi attacks on commercial shipping, but the campaign, which cost more than $1 billion, ended after a year with little success.

In August 2025, Israeli Prime Minister Benjamin Netanyahu authorised airstrikes against Houthi civilian leaders in Sana'a, killing 12 of the 16 ministers in the Houthi administration, including Prime Minister Ahmed Ghaleb al-Rahawi.

The Saudi-backed Yemeni government commands little support. Its forces remain weak and divided. Its military is notoriously corrupt, with troops rarely paid in full, if at all. The earlier Saudi-UAE coalition is now without the UAE's more effective forces, which backed southern Yemen secessionist groups that are rivals of the Saudi-backed government The UAE left Yemen in January at the Saudis' behest after relations between the two governments deteriorated.

The Houthis have another major advantage: control of the mountainous highlands alongside the Red Sea. Saudi Arabia and its Yemeni allies may attempt to expand their operations and force the Houthis to disperse their forces across several fronts. But this also risks intensifying the conflict rather than defeating the Houthis.

The danger of a wider war

Saudi Arabia's de facto ruler Mohammed bin Salman has already called on Trump to launch US strikes against the Houthis, designated as terrorists by the US, but Washington refused despite a defence agreement signed at the White House last November. A senior Trump administration official said the US wanted its "regional partners to take the lead". CNN, however, reported that more than 100 US military advisers are providing intelligence and targeting support to the Saudi military campaign through a newly established joint forces command.

Saudi Arabia may still seek military assistance from its allies. Its alliance with Pakistan, formed a year ago, includes a clause stating that an attack on one country is tantamount to an attack on both. A more recent Mecca agreement with Turkey and Pakistan is also based on mutual defence. However, it has yet to be approved by the two countries' legislative bodies and its operational details are still being formulated.

Last month Riyadh said that more than a dozen countries had joined a maritime coalition to safeguard shipping through the Red Sea. Saudi Foreign Minister Prince Faisal bin Farhan Al Saud warned the Houthis that they have "opened a door that they can't handle". Saudi Arabia's attempt to push the Houthis back can still draw in the US and other regional powers, including its Mecca Agreement partners.

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