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"Siege for Siege": The Battle for Bab al-Mandab

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While global attention has been focused in recent months on Hormuz, the battle over the Arabian Peninsula's second chokepoint, Bab al-Mandab, is rapidly escalating. The intensifying war in Yemen and the heightened Houthi threat to shipping in the Red Sea no longer constitute a separate arena, but rather another front in the regional war with Iran. Saudi Arabia finds itself in an hour of crisis and extraordinary strategic predicament: Hormuz is disrupted to the east, the East-West pipeline has been damaged, the Houthis are attacking inside Saudi territory, and the alternative route through the Red Sea is under threat. Its ability to defend its territory and secure its oil exports is thus under pressure from several directions simultaneously. The crisis is a test for the new alliance system that Riyadh has built, led by the "Mecca Alliance," but also for the United States. For the Trump administration, which seeks to reduce American involvement in the region, the challenge is to assist a key ally and ensure freedom of navigation without being drawn into another front against the Houthis and further expanding the war with Iran. Israel also has a direct interest in curbing the Houthis and preventing them from strengthening their hold over Bab al-Mandab. In this hour of Saudi distress, Israel should extend a hand to Riyadh and offer discreet assistance, without conditions and without attempting to exact immediate political return. Curbing the Houthis and keeping Bab al-Mandab open are now shared American, Saudi, and Israeli interests.

While the world's attention is fixed on the Strait of Hormuz, the next dangerous front in the Middle East is unfolding in Yemen. Nearly four years after the war there subsided, the Houthis have resumed a broad offensive—in the air, at sea, and on land. Their primary target is not only Saudi Arabia, but also the area controlling Bab al-Mandab, the second bottleneck encircling the Arabian Peninsula and one of the world's most vital shipping lanes. The large ground offensive launched by the Houthis in early September toward Mokha expanded their hold on the Red Sea coast and established their ground control in the area of the strait, now making it easier for them to disrupt freedom of navigation. At the same time, missile and UAV attacks on Saudi Arabia demonstrate that the campaign is also returning to the kingdom's territory. The implications extend far beyond Yemen: with Hormuz disrupted to the east, the Saudi East-West pipeline disabled following strikes from Iraqi militias, and the Houthis threatening the western outlet through the Red Sea, Bab al-Mandab has transformed from a secondary front into a central strategic arena. The Second Yemen War, if this is indeed the phase the region is entering, extends beyond Yemeni territory and into the Bab al-Mandab.

The significance of these developments reaches well beyond the war in Yemen. For years, Riyadh viewed Iran and the Houthis as two separate fronts: Iran was the strategic threat from the east, while the Houthis were a nuisance to the south. Now, the two fronts are active simultaneously and, arguably, in coordination. Iran is exerting pressure on Hormuz while its allies in Yemen threaten the southern gateway to the Red Sea. The two principal chokepoints surrounding the Arabian Peninsula are now being activated simultaneously, with each compounding the threat posed by the other. It is worth noting that the trigger for the current round also embodies this connection. In July 2026, the Houthis attempted to land an aircraft arriving from Tehran in Sana'a, in a bid to challenge the air and maritime blockade imposed on them. Aircraft from the Saudi-led coalition struck the runway and prevented the landing. The Houthis responded with missiles, UAVs, and the declaration of a maritime blockade on Saudi shipping, effectively bringing an end to the ceasefire that had held since 2022.

The timing of the confrontation is particularly troubling for Saudi Arabia. For decades, the kingdom invested in the East–West Pipeline, which carries oil from eastern Saudi Arabia to Yanbu on the Red Sea, specifically to reduce its dependence on Hormuz. Yet this achievement created a new dependency: in June 2026, roughly 92 percent of Saudi seaborne oil exports passed through the Yanbu terminal, with export volumes from the site surging nearly fivefold—from approximately 763,000 barrels per day prior to the crisis to around 3.8 million. In other words, the more dangerous Hormuz becomes, the more important the Red Sea becomes; and the more important the Red Sea becomes, the war against the Houthis is transformed from a nuisance on Saudi Arabia's southern border into a strategic threat to its trade and energy arteries. The route designed to diversify risk has itself become a chokepoint.

Since the Houthis declared a blockade on the kingdom on July 20, 2026, not a single oil cargo has been loaded on Saudi Arabia's western coast for export through Bab al-Mandab. Loaded tankers have been forced to sail north through the Suez Canal into the Mediterranean and then around Africa to reach customers in Asia—a route that lengthens the voyage from Yanbu to South Korea from approximately 24 days to around 54 days and also requires cargo to be transferred between vessels. More importantly, the Houthis have granted a de facto exemption to Chinese and Russian vessels, meaning the blockade is not a closure of the strait, but rather political screening of who is allowed to pass through it. On August 5, they attacked a Saudi tanker off the coast of Yanbu on an internal route between Yanbu and Jizan, hundreds of kilometers away from the declared blockade zone, explicitly linking the attack to the diversion of tankers northward. In short, the entire Red Sea has become dangerous for Saudi shipping.

Consequently, the kingdom has resumed striking Houthi targets in Yemen and supporting the forces fighting them, after years of seeking to extricate itself from the Yemeni war. According to the Houthis, Saudi Arabia carried out more than 120 strikes during the three days preceding the September 8 offensive. At the same time, Yemen's internationally recognized government launched its own bombing campaign and initiated a counteroffensive in al-Jawf and al-Bayda in an effort to disperse Houthi forces, while declaring a far more ambitious objective: retaking Sana'a.

In a sense, it is precisely the outcomes of the war with Iran that created an opportunity for the Houthis, ultimately heightening the pressure on Riyadh to re-engage in Yemen. During the previous round of fighting between Saudi Arabia and the Houthis, from 2015 to 2022, the Saudi-led coalition carried out tens of thousands of airstrikes in Yemen but failed to deprive the Houthis of their ability to attack the kingdom's energy, aviation, and civilian infrastructure. That campaign ended in a truce rather than a decisive victory for either side, and it remains to be seen whether lessons learned in Riyadh, shifts in the regional and global alliance structure, and evolving domestic circumstances for the Houthis will converge into a more decisive outcome in this current round.

Riyadh enters the campaign with a network of partners. The confrontation is therefore also the first test of the “Mecca Alliance,” signed by Saudi Arabia, Turkey, and Pakistan on August 7, 2026, which stipulates that an armed attack on one will be considered an attack on all three. So far, Turkey and Pakistan have limited themselves to sharp condemnations and calls for the Houthis to cease their attacks, with no evidence as yet of active military involvement in the conflict. Riyadh does not necessarily require Turkish or Pakistani "boots on the ground." It needs interceptors, drones, intelligence, and additional assets to protect its energy facilities and infrastructure. If Ankara and Islamabad supply them, the new alliance will gain its first operational substance. If they settle for mere condemnations, the gap between declarations and a willingness to bear the costs when one member state comes under attack will once again become apparent.

The larger question, however, is directed at Washington. From the Trump administration’s perspective, the developments in Bab al-Mandab present a particularly complex dilemma. The administration seeks simultaneously to prevent the war with Iran from expanding and avoid being drawn once again into a direct and prolonged campaign against the Houthis, while also preventing serious harm to Saudi Arabia and safeguarding freedom of navigation. These three objectives do not necessarily align.

The crisis is also a test of the regional architecture that the Trump administration seeks to advance: reduced direct U.S. military involvement and greater responsibility on regional partners for their own defense, alongside American assistance in intelligence, defense, logistics, and deterrence. In this sense, the question is not merely whether the United States will defend Saudi Arabia, but whether this model can withstand the test when one of its key partners comes under attack and requests more extensive assistance, while Washington remains reluctant to open another front.

Trump's priority appears to be avoiding direct entry into another campaign to the greatest extent possible. The war with Iran has already dragged on for months, and the American effort is focused on trying to limit its scope and find an exit strategy. A renewed campaign against the Houthis would require allocating additional forces and munitions, potentially creating a direct link between the Yemeni theater and the war with Iran, and further expanding the regional conflict. Trump's recent statements, that the Houthis are not interested in a war with the United States and that he is not concerned at this stage about the possibility of a confrontation with them, illustrate his desire to prevent the crisis from becoming another American front. Recent reports also indicate that Washington currently prefers to limit itself to intelligence assistance and support for Saudi Arabia, rather than transitioning to direct U.S. strikes.

Yet, refraining from involvement does not resolve the American dilemma. Saudi Arabia is a key partner of the United States, and sustained damage to its ability to export oil, alongside a threat to a major international shipping lane, impacts direct American economic and security interests. Moreover, withholding significant assistance from Riyadh could be perceived in the region as proof that even a close partnership with Washington does not guarantee backing in times of crisis. Against the backdrop of Saudi Arabia expanding its ties with other partners in recent years, this also carries implications for the standing and credibility of the United States in the region.

An intermediate option is therefore emerging: providing Saudi Arabia with substantial assistance without making the United States a direct party to the war. Such assistance could include intelligence and early warning, targeting support, the provision of interceptors and defense systems, an increased naval presence and escorts, and support for a regional coalition to safeguard freedom of navigation. Concurrently, Washington can leave the bulk of military operations against the Houthis to Saudi Arabia and its partners, while maintaining diplomatic channels intended to clarify American red lines to the Houthis and Iran. Direct military involvement would be reserved as an option should American forces or vessels come under attack, or if the Houthi threat expands to cause broad and sustained disruption to international freedom of navigation.

Domestic political considerations also constrain Trump's freedom of action. The congressional elections in November are approaching while the war with Iran, energy prices, and concerns about further American military entanglement are already part of the political debate. Opening another front in Yemen would make it difficult for Trump to explain to the public how an administration that pledged to avoid prolonged wars has found itself engaged simultaneously against Iran and the Houthis. Conversely, further disruptions to oil supplies and rising energy prices could exact an equally significant political cost. His recent remarks, linking an end to the war with Iran after the midterm elections with an expected drop in fuel prices, illustrate the extent to which economic and electoral calculations now factor into the administration's considerations.

Thus, the challenge for the Trump administration at this stage is not how to decisively defeat the Houthis, but how to prevent them from securing a strategic achievement, assist Saudi Arabia, and guarantee freedom of navigation without making the United States the primary proprietor of another war. Therefore, the administration will likely favor a calibrated involvement that relies on regional partners and is backed by significant American assistance, while setting a high threshold for direct U.S. entry into the campaign. The success of this approach will be a critical test of Washington's ability to sustain the regional architecture it seeks to build: reducing direct involvement without eroding deterrence or the trust of its partners.

Summary and Implications

Recent developments in Yemen illustrate that the war with Iran is steadily shifting from a direct conflict into a multi-front regional campaign. Yemen, Iraq, and the maritime arena are no longer separate fronts: Iran is disrupting traffic through Hormuz, the Houthis are pressuring Saudi Arabia and consolidating their hold over the Bab al-Mandab area, and pro-Iranian militias in Iraq are joining the campaign. The Iranian axis thus functions as a decentralized network capable of applying cumulative pressure from multiple directions, even without direct Iranian command and control over each of its components.

In this context, even limited control over maritime choke points itself becomes a strategic tool. Iran does not need to completely close Hormuz, nor do the Houthis need to fully block Bab al-Mandab. The capacity to pose a sustained threat to shipping, drive up insurance and transport costs, and render export routes unreliable is sufficient to generate leverage far exceeding their military power. The dangerous scenario is thus the creation of a "maritime pincer" around the Arabian Peninsula, wherein Iran and its proxies can simultaneously disrupt the region's two principal shipping arteries.

The crisis also exposes the limitations of the region’s new alliances. In recent years, Saudi Arabia has broadened its array of security supports—from the United States and the Red Sea maritime coalition to the “Mecca Alliance” with Turkey and Pakistan—yet in the moment of truth, none of them provides a comprehensive solution. Turkey and Pakistan have thus far abstained from direct military involvement, the United States is hesitant to broaden the campaign, and the anti-Houthi camp in Yemen suffers from fragmentation and weakness. This reflects a broader principle: a multiplicity of alliances affords states more options, flexibility, and room for maneuver, but it does not guarantee greater security.

Saudi Arabia is effectively under cumulative strategic pressure. Hormuz is disrupted to the east, the East-West pipeline designed to bypass it has been damaged, and to the south, the Houthis are threatening the alternative route through the Red Sea. The alternatives that the kingdom developed to reduce its vulnerability are themselves becoming targets. The kingdom does not lack oil; it lacks the ability to safely export it to the market. Reserves can provide breathing room and damaged infrastructure can be repaired, but repairing the pipeline does not resolve the crisis: what is restored today may be struck again tomorrow. The challenge is therefore not merely resuming exports, but securing export arteries that can be defended over time.

This strategic pressure also entails a direct threat to the Saudi home front. In recent days, authorities have been repeatedly forced to activate sirens warning residents of southern cities against Houthi missiles and drones, following previous attacks that caused dozens of casualties and struck energy infrastructure. Saudi Arabia is thus simultaneously required to protect its export routes, restore damaged infrastructure, and defend its cities against further attacks.

From an Israeli perspective, the principal implication is that the Houthi threat is no longer merely a Yemeni, Red Sea, or Gulf issue. It is part of the broader campaign by the Iran-led axis and the effort to pressure regional states by controlling their vital arteries. Israel and Saudi Arabia consequently share a clear and exceptionally strong interest: preventing the Houthis from successfully expanding and consolidating their control over strategically located territory which, among other things, enables the group to enhance its leverage over regional states and international commerce.

For Israel, this also presents a diplomatic and security opportunity. Precisely when Riyadh is discovering the limits of American support and the gap between its new partners’ declarations and their willingness to use force, Israel can demonstrate its value as a security partner by providing discreet assistance. Such aid should not be conditional. The assessment is that the kingdom will remember this "favor," just as previous Israeli assistance to Gulf states yielded political value at a later stage. The immediate interest is to deny Iran and its proxies the ability to disrupt the region's two maritime gateways; the long-term objective is to translate this convergence of interests into a foundation for a deeper Israeli-Saudi partnership in the day after.

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