

Between Bab al-Mandab and Hormuz: Will the Houthis escalate the campaign

written by Noa Lazimi | 23.03.2026

While Hezbollah has already chosen what appears to be a near-suicidal course—entering a high-intensity confrontation with Israel, perhaps out of an understanding that escalation was inevitable and therefore preferable on its own initiative—the Houthis in Yemen are still refraining from direct involvement.

The Houthi leadership has declared that it stands with Iran and is ready to act at any moment. Given the long-standing strategic partnership between the two sides, it is difficult to assume that the leadership of the Shi'ite-Zaydi movement could allow itself to avoid demonstrating some tangible form of support. The delay may stem from internal disagreements within the leadership over the appropriate timing, or perhaps from waiting for a signal from Tehran. Either way, the question increasingly seems to be not whether the Houthis will join the campaign, but when.

What scenarios might emerge—and what would their implications be?

According to a report published on a website affiliated with Hamas, a senior Houthi military official stated that if a decision is made to join the war, the first step could be the imposition of a naval blockade against the United States and Israel—one that would block the passage of vessels serving them, and possibly even aircraft carriers.

This statement signals a willingness, at least in principle, to threaten American assets in the Middle East. In such a scenario, the Houthis may not limit themselves to targeting vessels linked to Israel alone, as they have done even after the ceasefire agreement signed with the Trump administration in May of last year—an agreement they clarified does not apply to Israel.

However, the Houthis have already experienced the intensity of the American response when Washington used military force in response to attempts to restrict freedom of navigation in the Red Sea. Today, perhaps even more than before,

such a move could prove to be an especially dangerous gamble, given the significant concentration of American air and naval forces in the region.

Still, experience in the Middle East suggests that survival considerations in the narrow physical sense are not always the decisive factor in decision-making. The ideological zeal of the terrorist organization makes it difficult for it to remain merely a “bystander.” From the perspective of its leadership, the temptation to seize the opportunity to return to center stage and demonstrate regional power—even at the cost of severe damage to the organization itself—may prove too strong.

Economic pressure through trade routes

Another scenario, whether independent or complementary, would involve an attempt to enforce the closure of the Bab al-Mandab Strait—an approach consistent with Iran’s broader war strategy. This strategy relies on exerting pressure on regional states and Western powers by disrupting global trade routes, with the aim of slowing US and Israeli military momentum and accelerating the end of the war.

So far, Iran’s attempt to use the Strait of Hormuz as a pressure tool does not appear to have achieved the desired outcome. On the contrary, it has contributed to the emergence of a kind of regional coalition against Iran, with some Gulf states now reportedly considering active participation in the campaign against it.

Similarly, threats to the energy market and rising prices have not led to a change in the White House’s position. President Donald Trump, despite fluctuations in oil prices, has not signaled any willingness to halt the war for that reason and continues to project confidence that prices will stabilize or even decline. It is true that American consumers are sensitive to rising fuel prices, which result from increases in oil prices, but Trump still has additional tools at his disposal—such as temporary government subsidies and the release of strategic reserves. For now, he does not appear convinced that the situation requires using them.

To a considerable extent, this optimism has some basis. Energy experts note that the increase in oil prices does not reflect an actual shortage. Many countries in the region prepared in advance and built up oil reserves. In addition, bypass pipelines in Saudi Arabia and the United Arab Emirates allow exports to continue even if the Strait of Hormuz is disrupted—albeit not at full capacity.

The Yemeni card: A combined threat to regional security and the global economy

Against this backdrop, Tehran may be concluding that its moves in the Strait of Hormuz have not produced the desired effect. In such a scenario, the Yemeni militia could become an additional instrument for increasing economic and security pressure. If the Houthis were able to block the Bab al-Mandab Strait and even attack Saudi Arabia's Yanbu port—a major oil processing and export terminal on the Red Sea—they could disrupt Saudi Arabia's ability to export oil to Asian and European markets via routes that bypass the Strait of Hormuz.

A simultaneous disruption of both the Strait of Hormuz and Bab al-Mandab, combined with harassment of vessels already operating in the Red Sea, could significantly intensify pressure on the global oil market—particularly at a time when the market is highly sensitive to geopolitical developments. Iran may hope that such pressure will create a substantial lever against US allies—Gulf states and others affected by the disruption—in the expectation that this would encourage the American administration to shorten the duration of the war, perhaps even before achieving all of its objectives.

In this context, it is important to remember that the primary concern of the Gulf states regarding a war with Iran does not stem solely from the potential closure of the straits themselves, but mainly from the possibility of direct attacks on oil production infrastructure. In Saudi Arabia's case, most of these facilities are located in massive oil fields in the eastern part of the country. These are critical infrastructures: damage to them could halt production for an extended period, and their restoration would likely be a long and complex process. Until now, Iran has largely preserved this option, directing its efforts mainly toward storage facilities and export capacity.

These infrastructures could once again become targets of Houthi attacks, as demonstrated in the past by strikes on the oil facilities of Saudi Aramco using missiles and drones, as well as by current threats to attack vital installations in the kingdom. On the other hand, such an aggressive move would increase the likelihood of Saudi Arabia joining the campaign against both Iran and the Houthis—despite years of efforts to reach an arrangement with the rebels and even to pursue reconciliation with their Iranian patron.

For Tehran, therefore, the Yemeni arm represents another instrument in its toolbox for applying economic and security pressure on its rivals. As the campaign expands to include the region's trade routes and energy infrastructure, the risk of broader regional escalation increases—one that could draw additional actors into the confrontation and influence both the duration and intensity of the war.

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