

KEY JUDGEMENT

Humanitarian demand generated by the renewed Yemen conflict is already stressing the last-mile reception system in northern Djibouti, but it has not yet produced demonstrable disruption to Djibouti's national port, airport or Ethiopia-corridor functions. The intelligence significance lies in the timing and concentration of the pressure: Obock and Markazi are scaling shelter, sanitation, health and electricity support while Djibouti is simultaneously exposed to an active Houthi maritime threat at Bab el-Mandeb, renewed fighting in Ethiopia's Afar region, unusually dense foreign military activity around Djibouti City, and government mobilisation ahead of expected October-December heavy rainfall. These pressures are presently coexisting more than competing. Optarus assesses that the first commercially relevant constraint, if the humanitarian response expands, is more likely to appear in enabling services - local transport, power/water, medical referral, accommodation, contractors and administrative bandwidth - than in seaport throughput. A simultaneous deterioration in Afar or sustained higher Yemen crossings as maritime conditions improve would materially raise the risk of a compound logistics squeeze.

KEY FIGURES

>3,600	10,000	15%	>95%
ARRIVALS FROM YEMEN Djibouti Government, 22 Sep [1]	**DJIBOUTI RESPONSE PLANNING** Six-month inter-agency figure [3]	**UNHCR DJIBOUTI FUNDED** As of 22 Sep [3]	**ETHIOPIA TRADE VIA DJIBOUTI** Import-export volume [10]

ASSESSMENT CONFIDENCE

MODERATE-HIGH on observable local reception stress in Obock/Markazi; MODERATE on the near-term enabling-service spillover pathway; LOW on any claim of current national logistics, port, airport or Ethiopia-corridor disruption caused by the humanitarian response.

Analyst-led | AI-assisted OSINT | Cross-checked against FA-72-005/006, Northern Ethiopia Reopens and active Optarus watch lines

PRESSURE SYSTEM

YEMEN / BAB EL-MANDEB	OBOCK / MARKAZI	DJIBOUTI CITY	AFAR / ETHIOPIA CORRIDOR
Displacement + Houthi maritime pressure	Observed reception and service stress	Strategic logistics / military concentration	Second shock pathway; no corridor disruption confirmed

EXECUTIVE ASSESSMENT

Executive Assessment

What changed, what is established, and what remains an exposure pathway

INTELLIGENCE REQUIREMENT

At what point does rising humanitarian demand begin competing with military, commercial and routine civilian activity for constrained transport, accommodation, fuel, medical, port, aviation and security-support capacity around Djibouti and the western Bab el-Mandeb?

WHAT CHANGED

- The Yemen conflict has produced both large internal displacement and a cross-Bab el-Mandeb refugee movement. Djibouti's government reported more than 3,600 arrivals by 22 September, mainly families with a high proportion of women and children, concentrated in the Obock region and directed primarily toward Markazi. [1]
- This is no longer only a population-flow indicator. Djiboutian authorities have identified concrete shortfalls or expansion requirements in accommodation, sanitation, tents, essential equipment and electricity at Markazi. [2] UNHCR separately reports additional WASH, health, shelter and relocation measures. [3]
- The same state apparatus is operating in a higher-threat regional environment. Djibouti's navy and coast guard were already used in rescue operations off Obock after boats ran out of fuel, while MARAD continues to assess Houthi attacks as an active commercial-shipping threat around Bab el-Mandeb. [9][18]
- Northern Ethiopia has deteriorated further since the previous Regional Insight. Airport seizures and fighting in Afar are confirmed. Late-morning reporting on 28 September, drawing on humanitarian and local sources, said Erebti had fallen to Tigrayan forces, that the advance was moving toward Afdeera roughly 100 km farther east, and estimated at least 150,000 people displaced in Afar. Those territorial and displacement claims remain attributed and are difficult to independently verify amid degraded communications. No reliable evidence identified at cut-off established disruption to the Addis-Djibouti strategic corridor. [11][12][13]
- Djibouti has also begun pre-emptive flood preparation ahead of forecast above-normal October-December rainfall. This does not yet constitute a logistics disruption, but it creates a second call on water, sanitation, municipal and emergency-management capacity during the same response period. [17]

EVIDENCE STATUS

Issue	Evidence status	Current judgement	Confidence
Yemen arrivals into northern Djibouti	CONFIRMED	>3,600 reported by government by 22 Sep; UN agencies independently corroborate a rapid cross-strait influx.	High
Local shelter/WASH/health/power strain	CONFIRMED	Government and UN response documents identify additional tents, sanitation, water, triage and electricity requirements.	High
Djibouti City support-market spillover	NOT ESTABLISHED	No reliable public data yet show hotel, contractor, fuel or vehicle shortages attributable to the response.	Moderate
Port / airport congestion from response	NOT ESTABLISHED	No verified response-caused disruption to commercial seaport or airport performance identified.	Moderate-high
Ethiopia-Djibouti corridor disruption	NOT ESTABLISHED	Afar fighting is material, but no reliable evidence establishes road/rail/customs interruption on the strategic corridor.	Moderate-high
Maritime/security workload overlap	CORROBORATED	Coastguard/naval rescue activity has increased while the Bab el-Mandeb remains under an active Houthi maritime advisory.	Moderate-high
Compound pressure risk	PROSPECTIVE	Becomes decision-relevant if sustained Yemen arrivals coincide with Afar/corridor effects, flood response or wider support mobilisation.	Moderate

DEVELOPMENT

Development 1 - Yemen Is Generating a Sustained Source of Demand

The arrival count is only one part of the logistics signal

DEVELOPMENT

The west-coast conflict in Yemen has created a continuing source population for internal displacement and cross-border movement. UNHCR assessed close to 130,000 people newly displaced inside Yemen by 22 September, while Djibouti recorded more than 3,600 arrivals by sea. UNHCR's planning assumption for Djibouti is 10,000 people over six months. [1][3]

EVIDENCE / SOURCE QUALITY

- UNHCR and Djiboutian government reporting independently establish a rapid movement from Yemen to northern Djibouti. Entry points include Obock, Khor Angar, Moulhoule and Godoria, followed by transfer toward Markazi. [1][3][19]
- The observed arrival count is not a clean measure of underlying demand. UNHCR reported that people attempting to leave Yemen had been stranded by insecurity and shortages of fuel for boats. It also assessed that improved sea conditions could increase movement later. [19][20]
- MARAD's 23 September advisory states that the Houthis have resumed attacking commercial ships and have seized additional Red Sea islands and west-coast territory adjacent to Bab el-Mandeb, increasing their ability to locate and attack passing vessels. [9]
- WFP is scaling assistance inside Yemen while access and import dependence remain acute. The humanitarian response therefore has to manage demand on both sides of the strait, not simply a one-way evacuation flow. [21]

EVALUATION

- A temporary fall in arrivals would not, by itself, disconfirm the pressure thesis. Fuel shortages, insecurity and sea conditions can suppress crossings even when the number of people seeking to leave remains high.
- The same water space is simultaneously a commercial chokepoint, an active security environment and a civilian escape route. That creates an overlap in maritime awareness, rescue, coastal reception and small-craft monitoring requirements without implying that displaced people themselves constitute a security threat.
- Houthi territorial gains and commercial-shipping threat do not establish intent to target Djibouti or humanitarian movement. They do, however, reduce the margin for a benign operating environment around the western Bab el-Mandeb.

OPTARUS ASSESSMENT

The humanitarian logistics issue is likely to persist even if daily crossing figures fluctuate. The more important indicator is whether departures remain constrained by factors external to Djibouti and then accelerate when fuel availability or sea conditions improve. That would create episodic surges rather than a smooth, predictable flow - a more difficult pattern for reception, vehicle scheduling, medical referral and stock management.

ALTERNATIVES / UNCERTAINTY

- If fighting stabilises on Yemen's west coast and departures fall after transport constraints ease, the current surge may remain a short-lived spike rather than a sustained cross-strait displacement pattern.
- If most additional displacement remains internal to Yemen or shifts toward Somalia/Puntland/Somaliland, Djibouti's direct intake may stabilise even while the wider regional humanitarian system remains under pressure.

DEVELOPMENT

Development 2 - The First Bottlenecks Are Already Visible

Obock and Markazi show last-mile stress before national logistics indicators move

DEVELOPMENT

Northern Djibouti is no longer only a forecast pressure point. Current reporting identifies tangible response expansion in shelter, WASH, health, electricity and transfer support. By 16 September, 2,776 registered arrivals were already equivalent to more than 9% of Obock town's resident population. [4]

OBSERVED LOGISTICS CHAIN

Node	Function	Current intelligence	Status
Sea arrival / rescue	Small-craft crossings; rescue and landing	Djibouti navy/coast guard used in rescue after fuel failures at sea. [18]	CURRENT
Coastal reception	Registration, triage, temporary support	Rapid arrival tempo; multiple landing points; coordination burden. [1][3]	OBSERVED PRESSURE
Transfer to Markazi	Vehicles, scheduling, family movement	UNHCR/partners provide transport; no verified vehicle shortage yet. [3]	WATCH / UNPROVEN
Shelter / WASH	Tents, water, sanitation, drainage, waste	~700 tents required for 698 families; 127 available and 32 en route; 26 latrines completed with further WASH expansion. [3]	OBSERVED PRESSURE
Health / referral	Triage, additional personnel, supplies, referrals	MoH deployed extra personnel and triage; UNFPA/MSF/Red Crescent support. [3][4]	OBSERVED PRESSURE
Power / site services	Electricity and basic site function	Djibouti PM identified improved electricity supply as a priority need. [2]	OBSERVED PRESSURE
Back-end stocks	Warehousing / emergency staging	65,000 MT Humanitarian Logistics Base provides strategic storage buffer. [6]	CURRENT

THE STORAGE PARADOX

ANALYTICAL INFERENCE

Djibouti possesses substantial strategic warehousing, but the binding constraint in the present response is more likely to be the last mile. WFP's 65,000 MT Humanitarian Logistics Base was transferred to Djiboutian government management on 13 September - only days before the arrival surge. The handover is not evidence of reduced capability; WFP is providing six months of technical assistance. But it illustrates the distinction between national stockholding capacity and the local ability to convert stocks into transport, shelter, water, sanitation, health and electricity at Obock/Markazi. [6]

WHICH CONSTRAINTS APPEAR FIRST?

- 1. Shelter, sanitation and site utilities - already observable.
- 2. Reception staffing and transfer coordination - likely to tighten before national transport markets do.
- 3. Health triage and southbound referral capacity - especially if arrival volumes or vulnerability rise.
- 4. Local vehicle, fuel, contractor and procurement availability - still an exposure pathway, not a confirmed shortage.
- 5. Djibouti City accommodation, aviation handling and seaport/terminal capacity - higher-order thresholds; no material effect currently established.

DEVELOPMENT

Development 3 - Djibouti Is a Concentrated Strategic Support Node

Humanitarian pressure is landing on infrastructure already serving trade, military and regional-security functions

STRATEGIC CONCENTRATION

- The Addis-Djibouti corridor carries over 95% of Ethiopia's import-export trade by volume. World Bank material also estimates that about 87% of cargo handled in Djibouti's ports is in transit or re-exported to Ethiopia. Djibouti's logistics system is therefore both a national economic asset and a regional dependency. [10][22]
- Djibouti City also hosts a dense concentration of foreign military infrastructure. CSIS reported in September that China had upgraded communications and likely SIGINT capabilities at its PLA Support Base; U.S., French, Italian and Japanese facilities are located in the same small strategic area. [14]
- The Bab el-Mandeb and Gulf of Aden remain under active maritime-security pressure. MARAD maintains separate active advisories for Houthi attacks and piracy/kidnapping risks. This places commercial shipping, naval security and humanitarian coastal activity in the same broader operating environment even where they remain operationally distinct. [9]
- Djibouti and Ethiopia announced a 120-km refined-products pipeline from Damerjog to Dewele with more than one million cubic metres of planned storage. This is a future resilience measure, not current redundancy; it should not be counted as mitigation for today's response constraints. [15]
- ATTRIBUTED LOCAL COST SIGNAL - Capital Ethiopia reported on 27 September that Ethiopian truck drivers on the Djibouti-Addis route were facing materially higher day-to-day costs in Djibouti, citing a veteran driver and the Ethiopian Heavy Truck Drivers Association. Optarus does not attribute those increases to the humanitarian response. The relevance is reduced headroom: if transport, accommodation or contractor demand rises further, it would enter a support market already showing some cost pressure. [23]

CAPABILITY VS BANDWIDTH

> **KEY DISTINCTION**
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> Djibouti has considerable infrastructure capability. The intelligence question is bandwidth: whether several systems begin demanding the same scarce enabling inputs at the same time. A modern port does not create extra medical staff; strategic warehouses do not create transfer vehicles; military airfield capacity does not guarantee civilian ground-handling availability; and future pipeline infrastructure does not remove present dependence on road distribution.

CURRENT COMPETITION TEST

Shared system	Current evidence	Assessment	Posture
Commercial port / terminals	No verified humanitarian-response congestion	No direct competition established	LOW
Ethiopia corridor	No confirmed road/rail/customs disruption	High-consequence dependency; separate Afar pressure developing	WATCH
Foreign military / naval support	High baseline strategic activity	No evidence humanitarian response is displacing military use	WATCH
Fuel / road transport	No verified shortage attributable to response	Likely early enabling-service transmission channel if scaling continues	WATCH
Hotels / contractors	No reliable occupancy or shortage data	Plausible early spillover into Djibouti City if surge teams expand	WATCH
Medical / referral	Additional northern health capacity already deployed	Southbound specialist referral could transmit pressure earlier than ports	WATCH

ANALYTICAL SYNTHESIS

Cross-Regional Interaction - Coexistence Is Beginning to Matter

The risk is cumulative pressure on shared systems, not a single merged threat

ASSESSMENT

Djibouti is increasingly functioning as a rear-area pressure absorber for multiple regional crises. The evidence does not show that these crises have merged into one operational system. It does show that humanitarian reception, maritime security, Ethiopian corridor dependence, foreign military activity and climate-response preparation are drawing on a geographically concentrated state and support ecosystem. The most important intelligence task is identifying when coexistence becomes coupling.

PRESSURE STACK

Pressure source	Current intelligence	Potential coupling mechanism	Assessment
Yemen displacement	>3,600 arrivals; local reception expansion	Transport, WASH, health, power, accommodation	CURRENT INTERACTION
Houthi / Bab el-Mandeb insecurity	Active MARAD Houthi advisory; additional west-coast control	Coastguard/naval awareness, port security, commercial risk management	PARTIAL OVERLAP
Northern Ethiopia / Afar	Confirmed Afar hostilities; newer reports of deeper advances and large displacement remain partly attributed	Corridor security, truck flows, aid staging, possible eastward displacement	HIGH-CONSEQUENCE WATCH
Somalia / Gulf of Aden	Separate Yemen arrivals also reported in Puntland/Somaliland; piracy advisory remains active	Regional UN/NGO stocks, naval attention, funding competition	PARALLEL
Foreign military concentration	Multiple bases; Chinese comms/SIGINT upgrade reported	Aviation, port, accommodation, force-protection and specialist services	BASELINE HIGH
El Nino / heavy-rain preparedness	Government flood-prevention mobilisation in Djibouti City	WASH, drainage, road access, emergency personnel/equipment	WEATHER WATCH

NORTHERN ETHIOPIA: THE SECOND-SHOCK PATHWAY

- The previous Optarus Regional Insight assessed Afar as the transmission geography between the renewed Tigray conflict and the systems that feed Djibouti. That judgement remains valid. The African Union confirms fighting in Afar and the seizure of Mekelle, Axum and Shire airports. [11]
- Late-morning regional reporting on 28 September sharpened the Afar second-shock pathway: a humanitarian source said Erebti had fallen after heavy fighting, Tigrayan forces were advancing toward Afdeera around 100 km to the east, and at least 150,000 people had been displaced in Afar. These are significant indicators, but Optarus retains them as attributed reporting rather than settled territorial fact because access and communications are degraded and the displacement total has not been independently verified. [13]
- No evidence identified in the present sweep establishes disruption to the Addis-Djibouti strategic corridor. The escalation threshold is not simply 'fighting in Afar'; it is verified effect on the road/rail/customs/fuel system or a displacement/staging pattern that materially increases demand toward Djibouti.

CLIMATE: A TIME-BOUND COMPOUNDER

- Djibouti has activated flood-prevention measures ahead of forecast heavy October-December rainfall, including drainage and sanitation work in the capital. This is not yet a humanitarian-logistics disruption, but it creates a time window in which municipal, WASH and emergency resources may face additional claims. [17]

ANALYSIS

Competing Hypotheses

A structured test of how the pressure develops from here

WHY USE COMPETING HYPOTHESES?

The current evidence supports local stress but not national logistics disruption. The hypotheses below are collection frameworks, not predictions. They prevent every new arrival, convoy, procurement notice or Afar clash from being forced into a single escalation narrative.

H1 - LOCALISED ABSORPTION

- Humanitarian arrivals remain significant but are absorbed through Obock/Markazi with external support. Djibouti City sees limited secondary demand and national trade/military systems remain unaffected.
- Indicators: arrival rate stabilises after access constraints ease; no overflow beyond current reception footprint; no sustained vehicle/fuel/accommodation shortage; referral demand remains manageable; corridor and port performance remain stable.
- Decision relevance: keeps the issue primarily within humanitarian and local service planning.

H2 - ENABLING-SERVICE SPILLOVER

- The northern response expands enough to draw materially on Djibouti City for vehicles, fuel, contractors, accommodation, specialist health, communications or aviation support, without disrupting strategic trade flows.
- Indicators: emergency procurement/tenders, hotel block bookings, vehicle-hire tightening, repeated southbound referrals, additional charter movements, generator/fuel procurement, expanded UN/NGO surge teams.
- Decision relevance: affects humanitarian organisations, security providers, contractors, freight operators and official travel before it becomes a port/corridor event.

H3 - COMPOUND LOGISTICS SQUEEZE

- Humanitarian scaling coincides with a second shock - deeper Afar conflict/corridor effects, major maritime-security escalation or disruptive heavy rainfall - creating simultaneous demand on the same transport, fuel, medical, accommodation, communications and emergency-management systems.
- Indicators: verified corridor delay or rerouting; large eastward displacement; port/airport handling effects; security posture changes; flood-related road/service disruption; sustained Yemen arrivals near or above planning assumptions.
- Decision relevance: converts a local humanitarian response into a wider commercial and strategic operating constraint.

CURRENT WEIGHTING

OPTARUS JUDGEMENT

Evidence currently supports H1 with several early H2 conditions already visible at the northern end of the chain. H3 remains a lower-probability but higher-consequence watch case. Its plausibility has increased because Afar is now an active conflict geography and Djibouti is simultaneously preparing for heavy-rain risk, but neither factor has yet produced verified national logistics impairment.

CONFIDENCE

- HIGH - occurrence of rapid Yemen arrivals and local reception-system expansion.
- MODERATE-HIGH - first-order constraint sequence: shelter/WASH/power/health before port or airport capacity.
- MODERATE - enabling-service spillover into Djibouti City if the response scales.
- LOW - current humanitarian response is materially constraining national commercial, military or corridor capacity.
- LOW-MODERATE - compound squeeze in the near term; highly sensitive to Afar geography, arrival rate and weather.

DECISION SUPPORT

Commercial and Operational Consequences

What changes for organisations on the ground - and what does not

CURRENT VS THRESHOLD EFFECTS

Stakeholder	Current effect	Next-order exposure	Material threshold
Humanitarian organisations	Higher reception/WASH/health/shelter workload in north; funding gap severe	More local transport, surge staffing, accommodation and procurement demand	Arrival acceleration + overflow / site expansion
Freight / road transport	No confirmed national shortage	Tighter local vehicle/driver availability; higher scheduling friction	Emergency procurement + corridor delays / truck scarcity
Port / terminal users	No verified response-caused congestion	Landside handling/trucking competition if relief cargo scales materially	Backlogs, priority handling or measurable dwell-time change
Airlines / aviation support	No verified airport stress	More personnel/charter/medical movement could tighten ground handling	Repeated charters, handling constraints, slot/ground-service pressure
Hotels / accommodation	No reliable shortage data	Early Djibouti City spillover if surge teams/official delegations grow	Block bookings, rate/availability compression
Medical providers	Additional northern capacity already deployed	More specialist referrals and occupational-health demand	Persistent southbound referrals / capacity warnings
Fuel / utilities	Site electricity requirement identified; no national shortage	Generators/vehicles add local demand; weather may increase utility stress	Fuel rationing, procurement spikes, delayed movements
Security / protective intelligence	Maritime rescue and high regional threat environment	More staff movements, sites, official travel and route exposure	Additional contracts, route restrictions, security incidents
Corridor-dependent firms	No conflict-linked corridor disruption confirmed	High-consequence exposure if Afar effects reach road/rail/customs system	Verified delays, closure, rerouting or customs/fuel interruption

WHAT CLIENT CAPABILITY CHANGES FIRST?

- Planning horizon: organisations should expect greater volatility in arrival and support demand rather than a smooth demand curve, because crossings are constrained by fuel, insecurity and sea conditions.
- Procurement lead time: the first commercial effect is likely to be tighter access to enabling services, not lack of strategic warehousing or port capacity.
- Duty of care: more staff, contractors and official movements increase journey-management and situational-awareness requirements even without a new specific threat to aid personnel.
- Contingency dependence: organisations relying on the Ethiopia-Djibouti corridor should treat Afar developments as a separate but potentially simultaneous shock, not as proof the corridor is already impaired.
- Resilience assumptions: planned infrastructure such as the Damerjog-Dewele fuel pipeline should not be credited as current contingency capacity.

> **BOTTOM-LINE CONSEQUENCE**
>
> For most commercial users, the present issue is not whether Djibouti 'runs out of capacity'. It is whether a growing humanitarian footprint reduces the flexibility and responsiveness of specific enabling services that clients assume will be available at short notice. That distinction is the difference between a humanitarian story and an operational-intelligence problem.

SECURITY ASSESSMENT

Humanitarian-Security Interaction

Increased operational footprint, not displaced people, is the relevant exposure mechanism

SAFEGUARD

Optarus finds no corroborated evidence that the current refugee influx constitutes a militant-infiltration indicator or that displaced people should be treated as a security threat. The relevant security question is how a larger response footprint changes the number, visibility and movement of personnel, vehicles, facilities and official visitors in an already sensitive operating environment.

CURRENT SECURITY RELEVANCE

- Djibouti's navy and coast guard have already supported rescue operations linked to the crossings. This is evidence of additional maritime-security workload, not evidence of hostile activity by refugees. [18]
- The Bab el-Mandeb remains under an active Houthi maritime threat, while a separate MARAD piracy/kidnapping advisory remains active for the Gulf of Aden/Arabian Sea/Indian Ocean. Humanitarian coastal movements therefore occur inside a security environment where small-craft activity already requires careful classification and reporting. [9]
- Djibouti City contains multiple foreign military facilities and strategically important port/airport infrastructure. Increased diplomatic, military or humanitarian activity can raise force-protection, secure-transport and deconfliction requirements even where the underlying crises are unrelated. [14]
- No new, corroborated security incident specifically targeting aid/logistics personnel in the Djibouti response was identified in the final sweep. This remains a watch item rather than a present-tense escalation claim.

EXPOSURE PATHWAYS

Exposure	Mechanism	Security / operational concern	Posture
Road / coastal movement	More frequent journeys between entry points, Markazi and support nodes	Traffic disruption, crime, coercion, weather/road failure, route restrictions	Prospective
Aid / support sites	Larger visible footprint and more stored goods/equipment	Petty theft, intrusion, protest/disruption, service failure	Prospective
Hotels / official venues	Surge staff, contractors, delegations	Higher concentration of identifiable personnel and transport demand	Prospective
Maritime reception	More distressed small craft near strategic waterway	SAR burden, misidentification, navigation/security reporting complexity	Current / watch
Medical referral	More movement of vulnerable people and staff	Transport reliability, hospital capacity, duty-of-care complexity	Current / watch

COUNTER-INDICATORS

- No rise in security incidents around reception, transport or accommodation nodes.
- No additional secure-transport or protection contracting linked to the response.
- No route restrictions or force-protection measures that materially affect humanitarian/commercial movement.
- Stable port/airport/base operations despite the larger humanitarian footprint.

DECISION SUPPORT

Indicators & Warnings

Observable thresholds that would move the assessment

Indicator	Observable threshold	Why it matters	Effect
Yemen arrival pace	Sustained elevated crossings after fuel/sea constraints ease; cumulative movement toward 10,000	Persistent demand rather than an access-constrained spike	RAISE
Reception expansion	Overflow sites, large tent additions, new reception points	Existing northern capacity insufficient	RAISE
UN/NGO surge	Additional logistics teams, charters, rapid procurement or cluster-scale deployment	Support footprint widening southward	RAISE
Transport market	Urgent vehicle/driver contracting, delays, higher rates, repeated fleet shortages	First commercial enabling-service constraint	RAISE
Fuel / utilities	Generator/fuel procurement spikes, rationing, electricity/water service degradation	Direct support constraint	RAISE
Medical referral	Persistent southbound referrals, stock-outs, overload warnings	Northern capacity transmitting pressure to Djibouti City	RAISE
Accommodation	Hotel block bookings / guesthouse saturation / surge rates	Spillover into contractor and official-travel market	RAISE
Aviation	Repeated humanitarian charters or ground-handling constraints	Shared aviation-service pressure	RAISE
Port / terminals	Relief backlogs, priority handling, measurable landside or dwell-time effects	National strategic-infrastructure interaction	RAISE STRONGLY
Afar geography	Sustained fighting materially east/south of current northern approaches	Increases proximity to corridor and support systems	RAISE
Ethiopia corridor	Verified road/rail/customs/fuel delay, rerouting or closure linked to conflict	Second shock reaches high-consequence commercial system	RAISE STRONGLY
Weather	Flooding disrupts roads, drainage, water or service delivery during response period	Adds simultaneous emergency-management demand	RAISE
Military / security posture	New deconfliction, staging, base-support or port-security measures	Evidence of wider operational interaction	RAISE
Humanitarian funding	Funding remains ~15% while response footprint expands	Increases stop-start delivery and local resource dependence	AMBIGUOUS / IMPORTANT
Arrival decline	Crossings fall while fuel/security/sea constraints remain	Could reflect suppressed movement rather than reduced underlying demand	DO NOT LOWER ALONE
Absorption signal	Arrivals fall after constraints ease; no overflow/procurement/referral/city spillover	Best disconfirming pattern for near-term squeeze	LOWER

COLLECTION PRIORITY

The highest-value missing data are not additional headline arrival totals. They are time-series indicators of transport availability, emergency procurement, hotel/contractor occupancy, referral volumes, fuel drawdown, airport handling and corridor performance. Those are the measures that would demonstrate whether humanitarian pressure is propagating into the commercial support system.

OUTLOOK

Outlook, Bottom Line & Methodology

Publication basis, safeguards and source traceability

OUTLOOK

- Near term, Optarus expects the most visible pressure to remain around northern reception and site services. The risk of episodic arrival surges remains elevated because departures from Yemen have been constrained by insecurity, fuel and sea conditions rather than by a clear reduction in underlying displacement demand.
- The principal commercial transmission channel remains enabling services. A meaningful increase in Djibouti City demand for vehicles, accommodation, specialist medical support, contractors, communications or aviation would be a stronger indicator of widening logistics stress than additional tents at Markazi alone.
- Afar is the most important independent escalation pathway. If conflict effects reach road/rail/customs/fuel performance, Djibouti could face simultaneous humanitarian and trade-system pressure. Until that occurs, the Ethiopia corridor should remain an exposure watch rather than be described as disrupted.
- Expected October-December heavy rainfall adds a time-bounded vulnerability. Actual flooding or access problems would materially strengthen the compound-pressure hypothesis; preparedness activity alone does not.

> **BOTTOM LINE**
>
> Djibouti's northern humanitarian system is under observable pressure, but the national logistics hub is not currently overwhelmed. The intelligence value lies in identifying the transmission path before national indicators move: coastal rescue and reception -> Markazi shelter/WASH/health/power -> transfer/referral and procurement -> Djibouti City enabling services -> strategic port/airport/corridor systems. Evidence is currently concentrated in the first two stages. The assessment moves materially higher only when the pressure advances down that chain or when a second shock - especially Afar/corridor disruption or flood effects - arrives at the same time.

METHODOLOGY

- This assessment applies the intelligence cycle and cross-checks current humanitarian reporting against Optarus FA-72 maritime monitoring, Northern Ethiopia reporting, Djibouti pressure watch lines and current regional-security indicators.
- Primary and institutional sources were prioritised, including Djiboutian government reporting, UNHCR, UNFPA, WFP, African Union, MARAD and World Bank. Local/regional and specialist reporting were used to develop or qualify indicators where primary confirmation was incomplete.
- Confirmed fact, attributed reporting, Optarus assessment and unresolved hypotheses are separated. Conflicting counts are not smoothed into false precision; absence of public evidence is not treated automatically as proof of absence.

LEGAL / EDITORIAL SAFEGUARDS

- Attribution and current-versus-historical status checked; allegations and contested battlefield claims remain attributed.
- No implication that refugees or displaced people constitute a security threat; no militant-infiltration claim is made without corroborated evidence.
- Data minimisation applied; no non-public personal data used. UK GDPR/DPA, defamation and humanitarian-safeguarding considerations reviewed.
- Sanctions/export-control/ECJU review completed at strategic-OSINT level; no targeting, weapons-employment or controlled technical assistance is provided.
- Decision-support only: this product is not navigational, legal, insurance, humanitarian-operational or security-operational advice.

AI TRANSPARENCY

Optarus uses analyst-directed AI tools to support source retrieval, comparison, drafting and quality control. Analytical judgements, attribution decisions and publication thresholds are reviewed against the cited open sources before release. AI assistance does not replace source verification or analyst accountability.

SOURCE APPENDIX

Source Appendix

Selected public sources supporting decision-relevant judgements

[1] Presidency of Djibouti - Council of Ministers, 22 Sep 2026 - >3,600 arrivals; family/women/children composition; Markazi pressure.

[2] Primature, Republic of Djibouti, 20 Sep 2026 - Priority needs at Obock/Markazi: accommodation, sanitation, tents, essentials, equipment, electricity.

[3] UNHCR Emergency Update #1 - Yemen Situation, 22 Sep 2026 - ~130,000 Yemen displacement; L1 emergency; Djibouti 10,000 planning figure; shelter/WASH/health response; funding.

[4] UNFPA Djibouti Flash Update, 20 Sep 2026 - 2,776 registered by 16 Sep; >9% of Obock town population; health/protection response.

[5] UNICEF Djibouti, 13 Sep 2026 - Child/family arrivals; government-led reception and WASH/referral support.

[6] World Food Programme, 13 Sep 2026 - Transfer of Djibouti Humanitarian Logistics Base to government management; 65,000 MT storage; six-month technical assistance.

[7] Reuters, 18-22 Sep 2026 - Yemen west-coast escalation, displacement and expected additional refugee movement.

[8] UNHCR, 18 Sep 2026 - Nearly 3,000 arrivals in under a week; fuel/insecurity constraining departures; Markazi pressure.

[9] U.S. MARAD Advisory 2026-013, effective 23 Sep 2026 - Active Houthi commercial-vessel threat; additional west-coast/island control adjacent to Bab el-Mandeb.

[10] World Bank, Addis-Djibouti Corridor Project material - Over 95% of Ethiopia import-export trade by volume uses the corridor.

[11] African Union Commission, 23 Sep 2026 - Seizure of Mekelle, Axum and Shire airports; hostilities in South Tigray and Afar.

[12] Reuters / AFP, 23-28 Sep 2026 - Renewed northern Ethiopia offensive and Afar fighting; used with attribution for battlefield developments.

[13] Addis Standard / AFP-derived regional reporting, 27-28 Sep 2026 - Attributed reporting that Erebti fell to Tigrayan forces, movement was continuing toward Afdeera (~100 km east), and a humanitarian source estimated at least 150,000 displaced in Afar. Territorial depth and displacement totals remain difficult to independently verify.

[14] CSIS, Extended Range, 17 Sep 2026 - PLA Djibouti base communications/SIGINT upgrade and strategic base concentration.

[15] ENA, Ethiopia-Djibouti Pipeline Project, 24-25 Sep 2026 - Planned 120-km Damerjog-Dewele refined-products pipeline and >1m m3 combined storage; developmental, not current capacity.

[16] World Bank Djibouti climate/development material - ~87% of Djibouti port cargo transits/re-exports to Ethiopia; economic exposure to regional trade.

[17] Agence Djiboutienne d'Information, 13 & 27 Sep 2026 - Government heavy-rain/flood-prevention mobilisation ahead of Oct-Dec period.

[18] Agence Djiboutienne d'Information, 12 Sep 2026 - 500 Yemeni refugees reported rescued off Obock; navy/coast guard involvement.

[19] UNHCR, 15 Sep 2026 - Entry points, transfer toward Markazi and initial response requirements.

[20] UNHCR / Reuters, 22 Sep 2026 - Potential additional cross-sea movement as conditions improve; response underfunding.

[21] WFP / corroborating Reuters reporting, Sep 2026 - Yemen humanitarian response scaling and import/logistics dependence.

[22] World Bank Djibouti CCDR, 2024/2026 publication context - Approx. 87% Djibouti port cargo transit/re-export to Ethiopia; structural concentration.

[23] Capital Ethiopia, 27 Sep 2026 - Attributed reporting from an Ethiopian truck driver and the Ethiopian Heavy Truck Drivers Association of rising costs in Djibouti over the preceding two weeks. Not treated as evidence that the humanitarian response caused price inflation; used as an indicator of reduced commercial headroom in enabling services.

SOURCE HANDLING NOTE

The appendix is selective rather than exhaustive. Syndicated/copy reporting was not counted as independent corroboration. Battlefield claims in Ethiopia and forecast effects in Djibouti were downgraded where primary confirmation was absent. The publication cut-off is 11:50 BST on 28 September 2026; time-sensitive conditions may change after release.