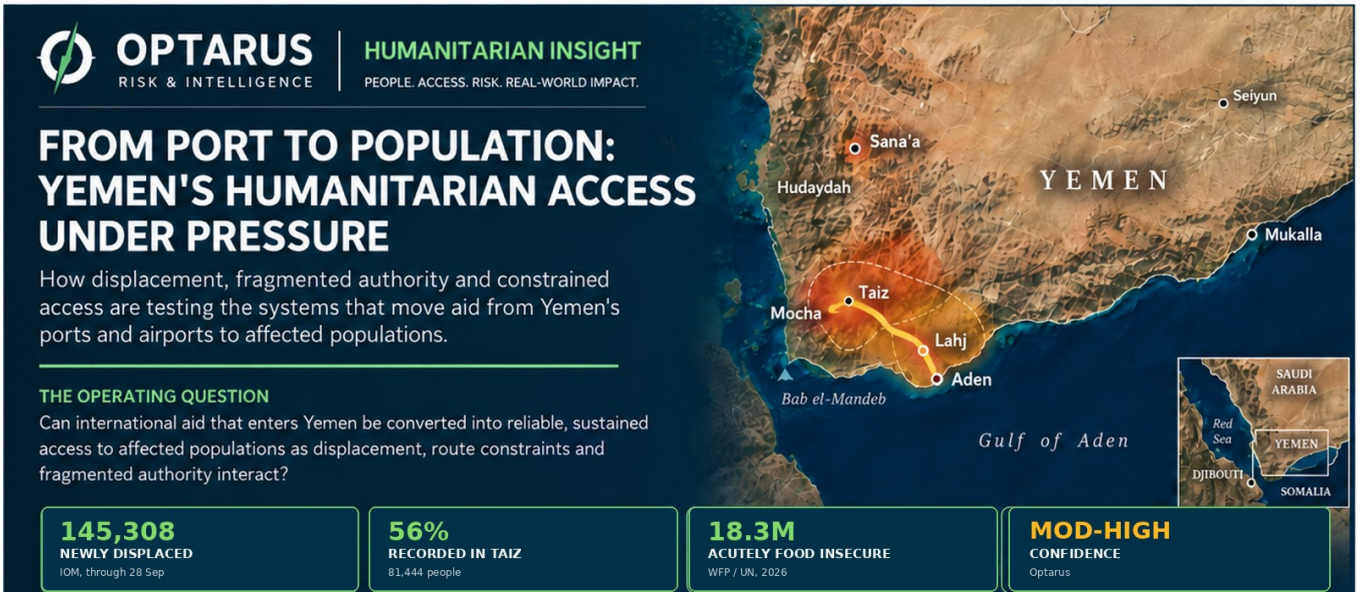


KEY JUDGEMENT

Yemen's humanitarian access problem is increasingly a conversion problem: aid and personnel can still enter through functioning gateways, but fragmented anti-Houthi command structures and wider administrative authority, constrained storage and transport, difficult terrain, variable deconfliction, explosive hazards and weak receiving-area capacity can progressively reduce how much of that nominal capacity reaches affected populations. The most decision-relevant deterioration may therefore occur behind the port rather than at the international gateway.

145,308	56%	18.3M	MOD-HIGH
NEWLY DISPLACED	RECORDED IN TAIZ	ACUTELY FOOD INSECURE	ASSESSMENT CONFIDENCE
IOM, through 28 Sep	81,444 people	WFP / UN, 2026	Optarus

Analyst-led | AI-assisted OSINT | Evidence refresh completed 29 September 2026, 15:30 BST

EXECUTIVE ASSESSMENT

What the evidence now supports

Renewed fighting across Yemen's western coast is transferring population pressure into Taiz, Lahj and Aden rather than producing only a frontline displacement problem. IOM reported 145,308 people displaced across eight governorates by 28 September - up 15,870, or more than 12%, in one week. Taiz hosted 81,444 people (56% of the total), Lahj 34,860 and Aden 12,456; Aden recorded the sharpest proportional weekly increase among the main receiving areas. [1][13]

The operating problem is broader than population movement. WFP assesses 18.3 million people as acutely food insecure, while the Logistics Cluster has documented immediate requirements for additional storage, transport monitoring and route assessment around Aden and Taiz. [2][6]

Humanitarian access is also shaped by fragmented authority and multiple approval systems. The anti-Houthi camp itself remains factionalised: AP reporting describes government-aligned forces divided by geography, external backing and political objectives, while Saudi Arabia is attempting to consolidate parts of the anti-Houthi force structure. Coordination is therefore uneven rather than absent. For humanitarian actors, local security awareness, permissions and deconfliction may not automatically transfer across formations or areas of control. ACAPS separately identifies overlapping permits, checkpoints and movement restrictions as persistent constraints. Geography and explosive contamination further reduce route redundancy. [3][4][19]

Issue	Evidence status	Current judgement
Recent western-coast displacement	CONFIRMED	145,308 people displaced by 28 Sep; Taiz remains the main receiving governorate, while Aden is rising quickly.
Aden / southern gateway access	OPERATIONAL / LIMITED	Port and air access remain available, but onward movement is permission-, route- and capacity-limited; UNHAS cargo is light and approval-dependent.
Storage / transport pressure	CONSTRAINED / DOCUMENTED	Logistics Cluster partners have identified storage requirements, route disruption and transport concerns.
Fragmented administrative access	CONFIRMED	Multiple authorities and permissions can delay or interrupt otherwise physically viable movements.
Systemic reception saturation	NOT ESTABLISHED	Pressure is rising, but current open sources do not establish generalised saturation across Taiz, Lahj or Aden.

PUBLICATION THRESHOLD

The Insight is publishable because a verified displacement surge now intersects with documented logistics constraints, fragmented access authority and weak baseline service capacity. Publication does not require asserting that Yemen's humanitarian system is failing; the assessment is that resilience is being tested across the delivery chain.

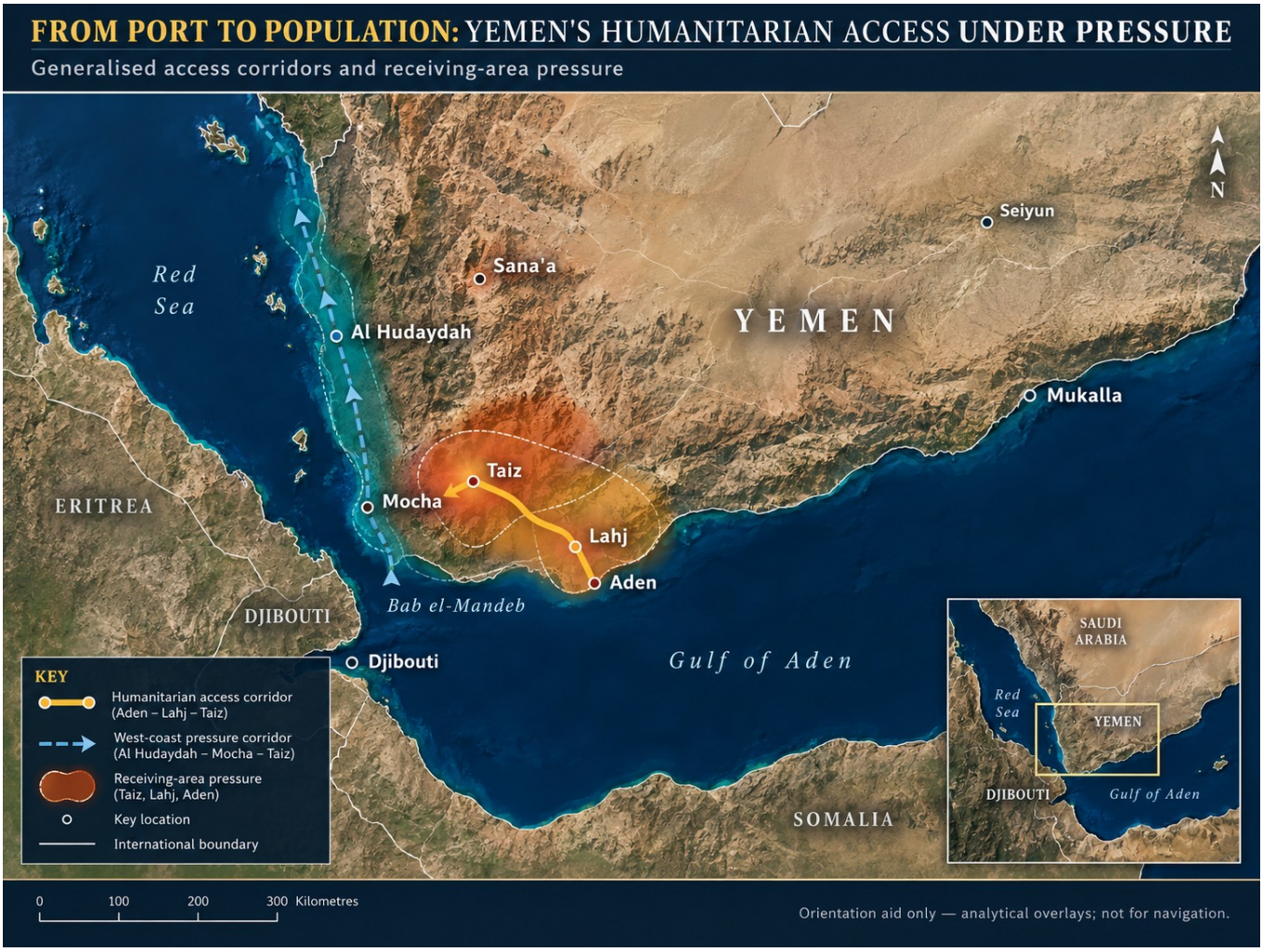


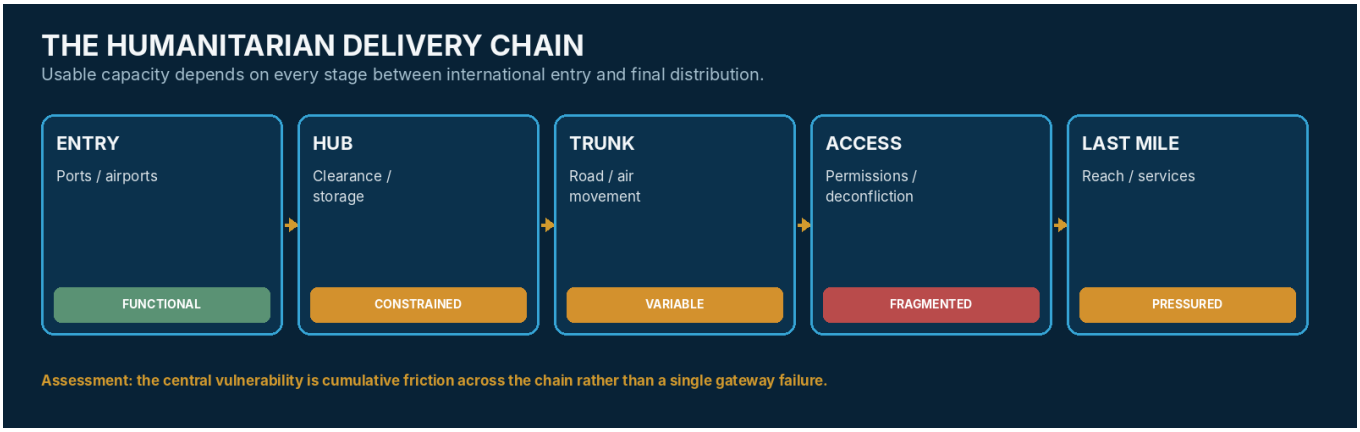
Figure 1. Yemen humanitarian-access orientation: principal gateways, receiving-area pressure and generalized access corridors. Orientation aid only; not for navigation.

GEOGRAPHIC INTERPRETATION

ADEN - LAHJ - TAIZ	WEST COAST	NORTHERN / EASTERN REDUNDANCY
Primary southern receiving and onward-access axis. Pressure in Taiz and Lahj ultimately draws on Aden-linked port, air, storage, health and trucking capacity.	Al Hudaydah-Mocha-Taiz remains exposed to active conflict and control changes. Tactical route availability can shift without creating stable humanitarian access.	Hodeidah remains important for northern Yemen; Sana'a, Seiyun and the Oman corridor provide alternatives for some movements, but with different permissions, times and capacity.

HUMANITARIAN OPERATING PICTURE

From port to population: where capacity can be lost



International entry is only the first stage. Aden remains a principal southern gateway, while UNHAS connects Yemen with Amman and Djibouti and serves Aden, Sana'a, Ma'rib, Mukalla/Riyan and Seiyun. UNHAS cargo is approval-dependent and light: the August Logistics Cluster meeting gave an indicative capacity of about 500 kg per flight, subject to passenger load, aircraft limits and permissions; Ma'rib services remained subject to final authority approval. Air access can therefore move people and urgent/high-value supplies, but it cannot substitute for bulk sea and road logistics. [7][12]

International gateways provide access - but not equivalent redundancy

Aden remains the principal southern gateway for humanitarian and commercial cargo, while Hodeidah remains important for northern Yemen. Logistics Cluster route planning also identifies the Salalah-Al Ghaydah-Shahan-Sana'a overland route as an alternative corridor, but with substantially longer journey times and additional administrative exposure; the Jeddah route has seen limited humanitarian use because of bureaucratic impediments. Alternative corridors therefore provide contingency, not equivalent capacity or speed. For organisations entering the environment, the practical question is whether an alternative route can sustain the required cargo type, timetable and onward access - not simply whether a route exists. [20]

The bottleneck may sit behind the gateway

A functioning port or airport does not guarantee effective humanitarian throughput. Storage availability, cold-chain capacity, trucking, fuel, customs, movement approvals, route security and final-mile access determine how much nominal entry capacity becomes usable delivery capacity.

> **DECISION-SUPPORT IMPLICATION**
>
> For donors and operators, the key question is not simply how much aid enters Yemen. It is where usable capacity is being lost: gateway, clearance, storage, trunk transport, permissions, deconfliction or final distribution.

ACCESS ENVIRONMENT

Fragmented anti-Houthi command and wider authority turn access into a system problem

Yemen's access environment is divided between rival administrations and multiple political, military and administrative structures. Within the anti-Houthi camp, government-aligned formations share a common adversary but do not operate as a single homogeneous command system. AP reporting highlights longstanding mistrust among major formations and differing external relationships, while Saudi Arabia is attempting to improve consolidation. A movement authorised or understood by one formation may therefore still encounter another command structure further along the route. This creates humanitarian friction without requiring physical infrastructure failure. [3][4][19]

Deconfliction becomes more difficult near active military areas when relevant actors operate through separate chains of command or incomplete information-sharing. Current evidence does not establish systematic friendly-fire incidents against humanitarian convoys, and Optarus does not infer such incidents without evidence. The relevant exposure is misidentification, unexpected route denial, checkpoint detention or inadvertent exposure to military activity where convoy notification, local command awareness and route control are not fully joined up. For humanitarian planners, 'road open' is therefore a weaker measure than 'route predictably and safely usable across the full movement chain'.

Terrain and explosive hazards reduce redundancy

Mountainous terrain across Taiz and neighbouring areas concentrates movement onto a limited number of passes, bridges and viable roads. ACAPS reported damage to the Haijat Al Abd highway linking Taiz with southern Yemen, while local reporting has documented fire affecting that route and adjacent civilian traffic. Government-aligned forces subsequently reported local counter-gains around Jabal Nu'man and attacks on Houthi supply lines west of Taiz on 25-26 September; these may alter tactical control and observation but do not establish a stable humanitarian corridor. Mine and explosive-remnant contamination adds a separate layer of route risk, particularly where previously unused secondary roads become alternatives. [8][14]

Constraint	Operational effect	Assessment significance
Multiple authorities	Repeated permissions / checkpoint friction	Reduces predictability even when roads are open
Command fragmentation	Variable deconfliction and local awareness	Raises movement uncertainty near active areas
Mountain terrain	Few viable alternatives	Local disruption can create system-wide effects
Mine / ERW contamination	Residual route risk after frontlines move	Physical openness does not equal operational safety
Communications failure	Loss of tracking / coordination / incident response	Can materially reduce otherwise usable access

OPERATIONAL EXPOSURE

The humanitarian constraint is wider than logistics

Food, health, communications, administrative access, organisational acceptance and financial compliance all affect whether humanitarian organisations can sustain operations. WFP reports 18.3 million people facing acute food insecurity, while WHO reported nearly 20 million people requiring health assistance in mid-September. [2][9]

RECENT OPERATIONAL EVIDENCE

Health-system load has risen materially. WHO reported 3,672 casualties between 6 August and 18 September, including 674 deaths and 2,998 injuries; Taiz and the West Coast accounted for 1,349 casualties. WHO described the health system as already overstretched, with displacement interrupting access to care and increasing pressure on facilities and referral pathways. [15]

Nutrition pressure is also becoming visible among newly displaced children. On 25 September, UNICEF reported that more than one in four of nearly 2,900 children screened by mobile nutrition teams in areas where safe access was possible were acutely malnourished, including more than 200 with severe acute malnutrition. This is a sampled access-dependent indicator rather than a national prevalence estimate, but it reinforces the need to track food, referral and mobile-clinic capacity in receiving areas. [16]

Personnel and premises risk is operationally significant. The UN reported on 11 September that a humanitarian common premises in Mocha and associated assets had been seized after staff relocated; 73 UN personnel remained detained as of June, constraining operations in de-facto-authority areas. For organisations entering or expanding operations, continuity planning therefore needs to account for detention, premises access, communications equipment and staff-relocation risk as well as kinetic threat. [17][18]

Who is exposed

Humanitarian organisations and NGOs need an integrated picture of authority, acceptance, access, staff exposure, logistics and population need. Logistics and freight providers need to understand gateway, clearance, storage, trucking, route and final-mile constraints. Security and risk functions need to separate kinetic threat from detention, administrative interference, communications failure, medical support and contingency. Donors need to distinguish lack of supply from lack of delivery capacity.

Programme access can differ by organisation and service type

Formal permission does not guarantee effective programme access. Organisation nationality, donor relationships, local partners, perceived neutrality and staffing model can influence acceptance. Restrictions affecting female staff can also reduce access to women and girls in programmes such as maternal health, protection and household assessment. [3]

> **WHAT WOULD CONSTITUTE A MATERIAL DETERIORATION?**
>
> A significant road corridor loss; sustained storage or trucking shortfall; material reduction in UNHAS or airport access; tighter movement or visa restrictions; widespread telecommunications loss; evidence that receiving areas cannot absorb further arrivals; or a funding-driven reduction in essential food, health or WASH delivery.

Medical referral, evacuation and communications are access dependencies

For organisations deploying personnel or operating mobile teams, clinical capability must be assessed alongside referral and evacuation access. WHO reporting shows rising trauma loads while damaged roads and insecurity delay ambulances, health workers and medical supplies. UNHAS and commercial aviation can shorten some movements, but schedules, permissions and lift limits mean they should not be treated as guaranteed medical-evacuation capacity. Communications resilience is equally material: loss of mobile, internet or approved communications equipment can reduce staff tracking, convoy coordination, deconfliction, medical response and crisis management even where a route remains physically open. [7][9][15]

Local delivery can transfer risk rather than remove it

International organisations may preserve programme continuity by relying more heavily on Yemeni staff, local NGOs, transporters and implementing partners when international movement is constrained. That can improve acceptance and reach, but it may also transfer physical, detention, administrative and financial exposure to local actors. Donors and programme managers therefore need to distinguish nominal programme continuity from the distribution of operational risk across the delivery chain. Partner geographic coverage, acceptance, safeguarding, financial controls, staff security and monitoring capacity are relevant indicators of whether localisation is increasing resilience or simply relocating exposure.

Decision use by audience

User	What this Insight helps them assess	Key watch question
Humanitarian / NGO	Authority, acceptance, staff exposure, programme access, logistics and service capacity.	Can people and assistance reach the intended population reliably and sustainably?
Logistics / freight	Gateway, clearance, storage, cold chain, trucking, fuel, route condition and final-mile access.	Where is throughput being lost between entry and delivery?
Security / risk	Kinetic threat, command fragmentation, deconfliction, detention, ERW, communications, medical support and contingency.	Is movement predictably supportable across the full route and command environment?
Donor / implementing partner	Need, absorption capacity, delivery bottlenecks, local-partner exposure and programme continuity.	Is the constraint lack of aid, or lack of usable delivery capacity?

Commercial and compliance interaction

The UK's Yemen sanctions regime remains in force. Humanitarian exceptions and licensing arrangements can mitigate some restrictions, but counterparties, suppliers, transport companies, agents and payment pathways still require case-specific screening. Compliance friction can therefore become an operational constraint even when funding is available. [11]

INDICATORS & WARNINGS

Indicators for the next 2-6 weeks

These are collection thresholds rather than predictions. They identify observable changes that would raise or lower the current assessment.

Indicator	Observable threshold	Effect on assessment
Displacement	Material acceleration or sustained secondary movement into Taiz, Lahj or Aden	RAISE
Route access	Closure / damage / control change on a principal humanitarian corridor	RAISE SHARPLY
Storage / transport	New Logistics Cluster request for common storage, trucking or emergency capacity	RAISE
Air access	Material reduction in UNHAS destinations, permissions or available lift	RAISE
Administrative access	New visa, customs, checkpoint or movement restrictions affecting multiple actors	RAISE
Health / WASH	Facility closures, referral disruption or communicable-disease pressure in receiving areas	RAISE SHARPLY
Market function	Significant food/fuel availability deterioration or transport-cost shock	RAISE
De-escalation	Fighting recedes, routes reopen and displacement growth slows without secondary movement	LOWER

INDICATOR UNDER WATCH - RECEPTION CAPACITY

There is not yet sufficient open-source evidence to conclude that Taiz, Lahj or Aden have reached generalised reception saturation. The assessment should strengthen only if accommodation, WASH, health, food-market or onward-movement indicators show that additional arrivals are exceeding usable local capacity.

Current judgement

MODERATE-HIGH confidence in the scale and direction of recent displacement and in the existence of significant access and logistics constraints. The 28 September IOM update strengthens confidence that pressure is still rising rather than plateauing, particularly in Taiz and Aden. MODERATE confidence in the near-term receiving-area pressure pathway. LOW confidence in any claim that the southern humanitarian delivery system is already in generalised failure; open-source capacity data remain incomplete and local conditions are highly variable. [13]

OUTLOOK

Bottom line

BOTTOM LINE
Yemen's humanitarian supply network remains functional, but the latest displacement data show that pressure is still accelerating: 145,308 people were recorded displaced by 28 September, with Taiz hosting 81,444 and Aden rising to 12,456. The most plausible deterioration pathway is cumulative: cargo enters -> storage tightens -> trucking slows -> permissions multiply -> route reliability falls -> local services weaken -> effective humanitarian throughput declines. The central measure over the coming weeks is therefore not how much assistance is pledged or reaches a port, but how much can be converted into reliable access to affected populations. [13]

Methodology & legal-risk review

- Attribution: operational and access claims are attributed to originating humanitarian and official sources where available; conflict-party claims are not adopted as fact without corroboration.
- Current-vs-historical check: long-standing access and mine hazards are used as context; they are not treated as proof of deterioration in a specific route unless current evidence supports it.
- Do no harm: the assessment excludes sensitive live movements, unpublished shelter locations, vulnerable-person data and operational details that could increase risk to humanitarian staff or affected populations.
- Data minimisation / UK data protection: no private-person dataset or unnecessary personal information is used.
- Sanctions: the assessment identifies compliance friction but makes no transactional or counterparty-clearance conclusion; case-specific legal screening remains necessary.
- Decision-support doctrine: the assessment identifies exposure, uncertainty and observable thresholds; it does not instruct organisations whether to deploy, move a convoy or enter a specific area.

AI transparency

Optarus uses analyst-directed AI for source retrieval, comparison, drafting, visualisation and quality control. Substantive judgements, attribution decisions and publication thresholds are human-reviewed against cited open sources before release.

SOURCE APPENDIX

Selected source base

[1] IOM DTM, 23 Sep 2026 - Yemen - Displacement Caused by Escalation in the West Coast, Update #11 (134,550 through 22 Sep).

[2] World Food Programme, 17 Sep 2026 - World Food Programme scales up response in Yemen as fighting displaces thousands; Yemen emergency data.

[3] ACAPS, 10 Feb 2026 - Humanitarian Access Overview: spotlight on fragmented contexts.

[4] ACAPS, 1 Apr 2026 - Yemen: possible escalation pathways and anticipated humanitarian impacts.

[5] UNICEF, 16 Sep 2026 - Renewed hostilities in Yemen push over 12 million children deeper into crisis.

[6] Logistics Cluster, 10 Sep 2026 - Yemen Ad Hoc Coordination Meeting Minutes, Aden.

[7] Logistics Cluster, 20 Aug 2026 - Yemen meeting minutes: UNHAS and logistics operations.

[8] ACAPS, 23 Sep 2026 - Yemen country situation update.

[9] WHO, 16 Sep 2026 - Director-General opening remarks at media briefing: Yemen health pressures.

[10] UNFPA Yemen, 21 Sep 2026 - Nearly 3,000 pregnant women at risk of giving birth without life-saving care as crisis escalates.

[11] UK Government, updated 1 May 2026 - Yemen sanctions: statutory guidance.

[12] Logistics Cluster / UNHAS - Yemen flight schedule and operational information, current for October 2026.

[13] IOM, 28 Sep 2026 - West Coast displacement update: 145,308 people / 24,218 households across eight governorates; 81,444 in Taiz, 34,860 in Lahj and 12,456 in Aden. IOM figures were reproduced in contemporaneous reporting on 28 Sep and corroborated by AP on 29 Sep.

[14] Yemen Monitor, 26 Sep 2026 - Government forces report counter-gains around Jabal Nu'man and attacks on Houthi supply lines west of Taiz; treated as local/conflict-party reporting and not as proof of stable humanitarian access.

[15] WHO / UN Yemen, 24 Sep 2026 - WHO scales up health response as escalating conflict deepens health needs in Yemen; 3,672 casualties reported 6 Aug-18 Sep, including 674 deaths and 2,998 injuries.

[16] UNICEF, 25 Sep 2026 - Hunger and malnutrition stalking Yemen's children as violence escalates; >25% of nearly 2,900 screened children acutely malnourished, >200 severe acute malnutrition.

[17] UN Spokesperson, 11 Sep 2026 - seizure of humanitarian common premises and assets in Mocha; staff relocated before seizure.

[18] United Nations, 10 Jun 2026 - 73 UN personnel remained arbitrarily detained; operational impact on humanitarian and development activity.

FREE PUBLICATION

Optarus publishes Humanitarian Insights freely to support wider understanding of humanitarian operating conditions. Readers who find this analysis useful may wish to support organisations providing assistance directly. Donations are made to the organisations themselves; Optarus does not collect, process, handle or receive any portion of donations.

Optional direct donation links:

British Red Cross - Yemen Crisis Appeal

Médecins Sans Frontières (MSF UK) - Donate

Optarus is independent of these organisations, receives no portion of donations, and provides these links solely as optional direct routes for readers wishing to support humanitarian assistance.

[19] Associated Press, 23 Sep 2026 - Yemen's factions battling Houthis share a common enemy but not common goals; anti-Houthi factions remain divided by geography, external backing and political objectives, while Saudi Arabia seeks greater consolidation.

[20] Logistics Cluster, 25 May 2026 - Regional Middle East supply-routes snapshot: Aden and Hodeidah access, Salalah-Al Ghaydah-Shahan-Sana'a alternative corridor, Jeddah-route constraints and comparative journey-time/administrative exposure.

COLLECTION CUT-OFF EVIDENCE REFRESH COMPLETED 29 SEPTEMBER 2026, 15:30 BST.