

FOURTH AXIS - 72-HOUR INTELLIGENCE UPDATE

FA-72-002 | Southern Red Sea / Bab el-Mandeb | Reporting cut-off: 18 September 2026, 12:00 BST

Product: FA-72-002 | Previous: FA-72-001 | Cycle: 72H | Status: OPEN-SOURCE ASSESSMENT

KEY JUDGEMENT - ASSESSMENT STRENGTHENED; THREAT NOW MORE OPERATIONALLY DIFFERENTIATED

We assess with Moderate-High confidence that the Houthi position around Bab el-Mandeb is moving beyond territorial acquisition into consolidation and coercive maritime leverage. Satellite-based analysis indicates defensive berm construction along Houthi positions east of the strait, while Reuters reporting on a US-Houthi meeting in Muscat indicates an emerging distinction between Saudi-linked shipping and other commercial traffic. This does not amount to a guaranteed safe-passage regime, nor does it prove a complete maritime-denial architecture. It does, however, increase the relevance of vessel ownership, beneficial ownership, management, charter and perceived Saudi affiliation to voyage risk. The loss of the Yemeni Red Sea Coast Guard simultaneously weakens a local interdiction layer opposite Horn of Africa routes. Houthi experimentation with components potentially applicable to 'loitering torpedoes' broadens the future threat set, but operational deployment is unconfirmed. [1][2][3][4]

What changed since FA-72-001

Change	Reporting	Analytical relevance
Selective targeting / coercive passage	Reuters confirmed a Muscat meeting through five sources. One Yemeni source said the Houthis would not attack Israeli or other commercial vessels except those belonging to Saudi Arabia. This is a reported position, not a formal guarantee. [1]	Strengthens the assessment that the threat may be discriminating rather than indiscriminate. Evaluation: B2 Confidence: Moderate-High.
Consolidation at Bab el-Mandeb	CTP-ISW assessed from 16 Sep satellite imagery that the Houthis had constructed about 11 km of earthen berms north of al-Aradi; no trench system was identified. [2]	Evidence of intent to hold terrain. It does not yet prove forward deployment of radar, missiles, UAV/USV/UUV systems. Evaluation: B2 Confidence: High.
Underwater strike development	CAR-linked reporting identified navigation modules and propellers that may be relevant to experimental 'loitering torpedoes'; CAR also continues to document Iranian-origin supply and local-manufacture enablement. [4][12]	Expands future maritime attack options. Evidence supports R&D, not operational deployment. Evaluation: B2 Confidence: Moderate-High on R&D; Low-Moderate on fielded capability.
Counter-force pressure	AP reported Saudi interceptor stocks are under pressure and Riyadh has sought air-defence support from France, Britain, Pakistan and Egypt; Saudi officials did not confirm stock levels. Italy separately ordered naval preparations to safeguard Italian shipping. [6][7]	Defensive scarcity and naval mobilisation increase the importance of prioritisation and persistent maritime surveillance. Evaluation: B2 / A1 Confidence: Moderate-High.

Analytical synthesis

Element	Assessment	Confidence
Intent	Saudi-linked shipping remains a reported potential target category; wider commercial passage may be used as leverage in exchange for US non-intervention.	Moderate-High
Capability	Geography and fortification improve persistence; underwater R&D broadens potential methods. Forward ISR/strike infrastructure on newly held positions remains unconfirmed.	High on geography; Moderate on operationalisation
Sustainment	Coast Guard withdrawal increases opportunity for cross-Red-Sea resupply; composition and volume of eastbound cargo remain unknown.	Moderate
Counter-force	Saudi defensive-resource pressure and Italian naval preparations show response is expanding, but no continuous regional counter-smuggling screen is demonstrated.	Moderate
Commercial effect	Bab el-Mandeb continues to operate, but current risk is more vessel-specific and linked to Saudi affiliation, energy-export resilience and the interaction with Hormuz.	Moderate-High

Approved working visual prepared 17 September 2026 and retained unchanged. Analytical findings below are updated to the 18 September 12:00 BST cut-off. Map is illustrative, not navigational; route markings do not by themselves establish confirmed movement.



Indicators, Evidence & Collection Priorities

Indicator	Reporting	Eval.	Analytical relevance	Confidence
Selective targeting	16 Sep Reuters: five sources confirmed the Muscat meeting; one Yemeni source described non-Saudi commercial vessels as outside the intended target category. [1]	B2	Differentiated risk; ownership/affiliation matter more than flag alone.	Moderate-High
Territorial consolidation	17 Sep CTP-ISW: ~11 km of berms constructed along Houthi frontline positions north of al-Aradi using 16 Sep satellite imagery. [2]	B2	Supports hold-and-defend phase rather than temporary occupation.	High
Coast Guard withdrawal	16 Sep The National: Red Sea Coast Guard evacuated to Djibouti; international backing expected to shift to government-held Gulf of Aden sectors. [3]	B2	Removes a successful Yemen-side interdiction layer.	High
Underwater weapons R&D	17 Sep The National citing CAR: navigation modules/propellers may be relevant to 'loitering torpedoes'; CAR documents continuing Iranian-origin supply. [4][12]	B2	Potential future subsurface threat; no operational deployment confirmed.	Moderate-High / Low-Moderate
Chinese pressure on Tehran	17 Sep Reuters: three Iranian sources said China privately asked Tehran to help restrain Houthis after a Saudi appeal. [5]	B2	Shows Riyadh/Beijing perceive Iranian influence; does not prove Iranian command of Houthi decisions.	Moderate-High
Saudi defensive pressure	AP: two regional officials said Saudi interceptor stocks are running low and Riyadh sought allied air-defence support; no Saudi confirmation. [6]	B2	Raises defensive prioritisation pressure around cities, bases, oil infrastructure and maritime approaches.	Moderate
Italian naval posture	17 Sep Reuters: Italian defence minister ordered navy preparations for measures to guarantee secure transit of Italian vessels; assets/measures unspecified. [7]	A1	Counter-maritime posture is beginning to adapt to commercial exposure.	High on announcement; Moderate on effect
Transit volumes	18 Sep Reuters/Kpler: 23 commodity vessels crossed Bab el-Mandeb Thursday versus a 10-day average of ~26; 13 northbound, 10 southbound. [8]	B2	Traffic continues; no current evidence of closure. AIS-dark movements limit completeness.	Moderate-High
Saudi export adaptation	18 Sep Reuters: Aramco sold ~60m barrels from Ras Tanura for STS loading at Sohar in Sep-Oct, offsetting some reduced Yanbu flows after East-West pipeline damage. [9]	B2	Commercial adaptation is occurring, but cargo still crosses Hormuz at Saudi risk before transfer outside the Gulf.	Moderate-High

Indicators to watch - next 72 hours

- Radar/EO/IR, communications, missile/UAV launch infrastructure, fast craft, USV/UUV launch-recovery activity or workshops at newly held coastal/island positions.
- Further berms, trenches, hardened positions, ammunition/fuel stores or Houthi air-defence deployment around Dhubab, Mokha, Hanish or Perim/Mayun.
- Observable application of Saudi-linked targeting criteria: ownership, beneficial ownership, management, charter, cargo, port-call history or perceived affiliation.
- Eastbound dhow/small-craft loading from Djibouti, Eritrea or Sudan; night landings; AIS-dark movements; onward vehicle movement from Yemeni landing sites.
- New interdictions or coordinated patrols by Djibouti, Sudan, Eritrea, Yemeni government, CMF/EUNAVFOR/ASPIDES or national navies.
- Material changes in P&I / war-risk terms, carrier suspensions, voyage instructions or naval escort requirements.

Transit Risk Dashboard - Bab el-Mandeb

Risk field	Current status	Assessment
Traffic / transit status	OPEN / DEGRADED RISK ENVIRONMENT	Reuters/Kpler recorded 23 commodity-vessel transits on 17 Sep versus a 10-day average of ~26. Traffic is continuing; AIS deactivation means totals are provisional. [8]
Confirmed attacks in window	NO NEW MERCHANT-VESSEL STRIKE IDENTIFIED IN SOURCES REVIEWED	Saudi territory and infrastructure remained under Houthi attack, but the reporting reviewed for this cycle did not identify a new confirmed merchant-vessel strike in Bab el-Mandeb.
Target profile	DIFFERENTIATED / SAUDI-LINKED	Reported Muscat position suggests non-Saudi commercial passage may be tolerated while Saudi-owned/linked vessels remain exposed. Treat as reported intent, not guarantee. [1]
Houthi geography / capability	ELEVATED	Near-exclusive control of the Red Sea coastal plain and fortification around the strait improve surveillance, cueing and staging options. Specific forward ISR/strike deployments remain a gap. [2]
Underwater threat	DEVELOPING / NOT CONFIRMED OPERATIONAL	CAR-linked reporting points to R&D relevant to loitering torpedoes. No evidence yet of an operationally deployed system. [4]
Counter-maritime posture	INCREASING BUT FRAGMENTED	Italy is preparing a national naval response; IMO regional mechanisms exist; Yemen-side Coast Guard capacity has degraded. [3][7][10][11]
Saudi defensive resilience	UNDER PRESSURE	AP reports interceptor scarcity and requests for allied air-defence support. Stock levels are not officially confirmed. [6]
Commercial adaptation	ACTIVE	Aramco is shifting additional volumes via Gulf-to-Sohar STS transfers to compensate for impaired Yanbu flows; this adaptation still requires Hormuz passage. [9]

Decision question for a shipowner / underwriter

For this vessel, on this voyage, what has changed that should affect the decision to transit Bab el-Mandeb rather than reroute? The present evidence argues against treating all traffic as equally exposed. The most material differentiators are Saudi ownership or perceived affiliation, the vessel's route and cargo, the availability of naval support, and any evidence that Houthi surveillance/strike systems have been moved forward.

Commercial / operational implications

Client lens	Implication
P&I / war-risk	Move from broad regional-risk framing toward vessel-specific affiliation analysis. A reported Houthi assurance is not an underwriting guarantee.
Shipowner / operator	Warning margins could narrow if Houthi ISR and strike systems are forward-deployed. Continue monitoring island/coastal militarisation, not territory alone.
Saudi energy	Bab el-Mandeb pressure now interacts with impaired East-West pipeline/Yanbu resilience and constrained Hormuz traffic. Aramco's Sohar STS response shows active route adaptation rather than restoration of a secure bypass. [8][9]
Naval / state response	A chokepoint escort problem may become a wider sea-lane protection problem if the threat envelope moves northward or underwater systems mature.

Priority Intelligence Requirements & Intelligence Gaps

PIR	Requirement
PIR 1 - Selective maritime threat	Is Houthi consolidation around Bab el-Mandeb being converted into persistent surveillance and selective strike capability against Saudi-linked vessels?
PIR 2 - Forward militarisation	What radar/EO/IR, missile, UAV, USV/UUV, EW, communications or coastal-defence systems have been deployed to newly held positions?
PIR 3 - Coast Guard vacuum	Is the withdrawal of the Yemeni Red Sea Coast Guard enabling increased eastbound sustainment, dual-use or military cargo, and where are the landing/distribution nodes?
PIR 4 - Sudan/Horn logistics	Does African-side activity represent opportunistic transit/resupply or an emerging Iranian-supported logistics architecture capable of sustaining Houthi operations?
PIR 5 - Counter-maritime response	Are regional/international mechanisms producing measurable detection, intelligence-sharing, escort or interdiction outcomes?
PIR 6 - Underwater capability	Do components associated with experimental 'loitering torpedoes' progress to a fielded system, and what launch/recovery infrastructure would be required?

Principal intelligence gaps

- No confirmed inventory or location of new Houthi radar/EO/IR, anti-ship missile, USV or UUV systems at newly captured coastal/island positions.
- No reliable measure of eastbound return-cargo volume or composition across the Yemen-Horn small-craft bridge.
- No demonstrated continuous counter-smuggling screen from Sudan through Eritrea to Djibouti following the Yemen-side Coast Guard withdrawal.
- No confirmed operational deployment of a loitering underwater weapon.
- The practical durability of the reported Muscat targeting understanding remains untested.
- Iranian influence over Houthi strategic behaviour is evident but does not establish tactical command; China's request to Tehran should not be treated as proof of control.

Facilitator-level collection leads

Open-source research identifies one named Yemen-Somalia facilitator and a dual-sided smuggling network that sharpen the collection requirement for equivalent Sudan/Eritrea bridge actors. These are collection leads; they do not alter the current FA-72-002 key judgement.

Lead	Evidence	Collection significance
Named Yemen-Somalia facilitator	The Century Foundation identifies Abdishakur Yahye Ali ('the Joker') as a Houthi affiliate who appears to have taken over Ahmed Elmi Samatar's Houthi-al-Shabaab liaison role. Ali was killed in an apparent US drone strike in al-Ghayda in February 2026; Yemeni security forces reportedly recovered a Houthi-issued Sana'a passport. TCF further reports that Ali oversaw weapons preparation and onward movement toward Mukalla/Bossaso. [13]	Provides a concrete facilitator-level bridge for Yemen-Somalia. Priority: identify comparable named facilitators, financial conduits or logistics managers connecting Yemen to Sudan or Eritrea. Evaluation: B2 Confidence: Moderate.
Dual-sided route-control model	TCF reports that the Bamaleh family network controls smuggling routes inside government-held Yemen and maintains an operational hub in Bandarbeyla, northeastern Somalia. [13]	Useful structural analogue for what genuine cross-node convergence would look like: the same facilitator/network controlling both sides of a maritime route. No equivalent Port Sudan/Massawa bridge actor is yet established. Evaluation: B2 Confidence: Moderate.

Source base

[1] Reuters, 16 Sep 2026 - US officials met Iran-backed Houthis in Oman over the weekend, sources say	[8] Reuters, 18 Sep 2026 - Hormuz traffic below 10-day average; Bab el-Mandeb at 23 vs. ~26 average
[2] CTP-ISW, 17 Sep 2026 - Iran Update, including satellite-based assessment of Houthi berm construction	[9] Reuters, 18 Sep 2026 - Aramco to boost Gulf exports via Sohar ship-to-ship transfers
[3] The National, 16 Sep 2026 - Yemen coastguard flees to Djibouti after Houthi takeover	[10] IMO, 3 Sep 2026 - Regional cooperation key to maritime security in the Red Sea and Gulf of Aden
[4] The National, 17 Sep 2026 - Houthis experiment with 'weapons no other armed group possesses'	[11] IMO, 25 Aug 2026 - IMO supports national maritime security governance in Yemen
[5] Reuters, 17 Sep 2026 - China presses Iran to help rein in Houthis after Saudi appeal, sources say	[12] Conflict Armament Research, 2026 - Powering the Houthis / Iranian-origin missile and UAV component supply
[6] AP, 16-17 Sep 2026 - Saudis seek allies' help as missile defenses run low in fight with Houthis	[13] The Century Foundation, Aug 2026 - From Spoke to Hub: The Houthis in Africa
[7] Reuters, 17 Sep 2026 - Italy readies navy to protect its shipping amid Bab el-Mandeb tensions	[14] FA-72-001, 15 Sep 2026 - Fourth Axis 72-Hour Intelligence Update (baseline assessment)

Analytic note - This product distinguishes reported information from analytical judgement. Admiralty-style source/information evaluations are separate from analytical confidence. No hypothesis is upgraded to fact without corroboration. AI-assisted workflow: OpenAI's ChatGPT assisted with open-source research, source comparison, drafting and document production; analytical direction, source selection, judgements and dissemination responsibility remain with Stephen J. Taylor.