

Taiz Under Siege

**Fragile Improvement in the Supply of Essential
Goods Amid a Worsening Humanitarian Situation**

October 2026

Taiz Under Siege: Fragile Improvement in the Supply of Essential Goods Amid a Worsening Humanitarian Situation

Third Briefing Since the Start of the Latest Military Escalation in Taiz Governorate – October 2026

Monitoring Period: 10–21 October 2026 | Builds on the Second Briefing Issued
on 13 October 2026

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Summary of the Third Briefing on the Situation in Taiz

■ **Road Closures and Supply Shortages:** Wheat and flour shipments entered the city from mid-October, and by 17 October, white flour and milled wheat had returned to most of the shops monitored, selling at approximately YER 50,000 per 50-kg sack (USD 1 = YER 1,564). However, Al-Dhabab Road, currently the only access route to Taiz, has been opening for only a few hours almost daily, with repeated closures by Houthi group fighters.

■ **Declining Fuel Prices Amid Limited Availability:** Black-market petrol prices fell from more than YER 100,000 per 20 litres at the beginning of October to YER 60,000 on 17 October, although prices remain nearly twice their pre-escalation levels. LPG continued to sell for between YER 25,000 and YER 40,000 per cylinder. The first tanker carrying domestic gas to the city on 19 October was emptied on the day of its arrival.

■ **Disruption of Commercial Activity:** The Taiz Industry and Trade Office warns that repeated closures, occurring “every day or two,” are forcing traders to reduce supply orders, postpone shipments, and shift away from investment towards stockpiling.

■ **Widening Gaps in Humanitarian Assistance:** The number of people in Taiz whom the World Food Programme (WFP) is unable to reach has risen to more than 600,000, compared with approximately 350,000 people across Taiz and Al Hudaydah combined just two weeks earlier.

■ **Suffering Among Patients and Water Shortages:** According to the Health Office, 1,110 kidney failure patients and 192 intensive care patients are at risk of running out of medicines and fuel. The local authorities accuse the Houthis of preventing water tankers supplied from wells in the Al-Dhabab area from reaching the city.

■ **Worsening Humanitarian Crisis:** The humanitarian and living conditions in Taiz city have deteriorated further due to the continued siege imposed on the city by Houthi forces and ongoing armed clashes along all front lines surrounding the city. Numerous civilians, including women and children, have been killed as a result of attacks on several neighbourhoods. Incidents involving attacks on ambulances and medical teams by Houthi group fighters have also been documented.

1. Developments in the Situation in Taiz

The Studies and Economic Media Center (SEMC)'s second briefing, issued on 13 October, documented the transition of Taiz city from a state of partial siege to near-total isolation from supply routes, following the takeover of districts surrounding the city by Houthi group fighters and the tightening of the siege from all directions. This included the closure of the main Taiz–Al-Turbah–Aden road on 4 October, alongside the disappearance of petrol, LPG, and white flour from markets in Taiz Governorate, home to approximately 1.5 million people.¹ This third briefing covers the period from 10 to 21 October, tracking developments in the humanitarian and economic crisis.

Although the availability of some essential commodities has improved relatively, intensified fighting, the suspension of economic activity, and disruptions to humanitarian assistance have worsened food insecurity among thousands of families, particularly those living in areas affected by armed clashes between Houthi group fighters, on the one hand, and IRG of Yemen forces and the Popular Resistance, on the other.

The relative improvement in food availability is attributable to limited shipments entering the city and existing stocks held by traders. However, consumers are finding it increasingly difficult to access these commodities because of high prices and the lack of guarantees that supplies will continue to arrive regularly. Supply routes remain almost entirely disrupted, while alternative channels for bringing goods into the city are limited and fraught with risks.

The quantities entering the markets have replenished existing stocks, which, according to estimates in the SEMC's second briefing, were sufficient to meet demand for approximately 19 days. Nevertheless, continued disruption and uncertainty make further depletion of stocks and price increases likely as long as the underlying causes of the crisis persist.

2. Roads and Access: The Only Access Route Opens for Just a Few Hours

Throughout the monitoring period, Al-Dhabab Road remained the only land route through which supplies could enter the city. According to the SEMC's monitoring team, the road opened almost daily for a few hours to allow people to enter and leave, with repeated closures and no announced reasons. On 17 October, for example, the road remained closed to people entering the city until 3:00 p.m., while those leaving were allowed to depart from the morning until noon, according to

¹ Studies and Economic Media Center (SEMC), *Taiz Under Siege: The Economic and Humanitarian Consequences of the Closure of Supply Routes*, Second Briefing, 13 October 2026.

eyewitnesses. These restrictions coincided with clashes on the western front of the city, around the Old Airport and Madrat areas, as reported by the government-aligned military in Taiz.²

As the domestic LPG crisis intensified, suppliers resorted to limited alternative options. According to field monitoring, small vehicles travelled to the Al-Birayn and Al-Safiyah areas in Al-Turbah to refill LPG cylinders before returning to sell them on the city's black market.³ These small quantities, which cover only a limited proportion of the city's daily needs, pass through areas of armed confrontation and front lines in small consignments and at high cost.

The Houthi group has used the limited, hours-long partial opening of the road to promote its narrative that the route is open and movement is normal. This narrative has been disseminated through the group's media channels and videos posted by its activists on social media. However, local witnesses maintain that controlling access routes in this manner, through restrictions on opening hours and repeated, unpredictable closures, is currently one of the group's tools of warfare.⁴

3. Economic Impacts

A. Food: Commodities Return Thanks to Existing Stocks and Incoming Shipments

On 15 October, Abdulrahman Al-Qulai'ah, Director of the Industry and Trade Office in Taiz city, told the SEMC that shipments of wheat had entered the city, including 11,550 sacks of wheat and flour and 3,400 cartons of yogurt and milk in a single day. He explained that, since May, the office had encouraged traders to build up commodity stocks after many of them postponed shipments following the closure of the Strait of Hormuz. He said that "these stocks helped ease panic and hoarding."⁵ On 10 October, the office had also supervised the distribution of 1,200 sacks of flour through two traders in the city.

These developments were reflected in prices and commodity availability. On 12 October, white flour returned to some shops at YER 60,000 per 50-kg sack, compared with YER 38,000 before the escalation, according to shop owners. However, wheat remained unavailable in most shops. By 17 October, white flour and

² SEMC field monitoring records in Taiz city, dated 12 and 17 October and covering 17–21 October 2026. These include accounts from shop owners, vegetable traders, and eyewitnesses to road movements, as well as monitoring of local reports. Primary, unpublished sources; the identities of those providing information have been withheld.

³ SEMC field monitoring, 10–21 October 2026, *ibid.*

⁴ SEMC field monitoring, 10–21 October 2026, *ibid.*

⁵ Director of the Industry and Trade Office in Taiz city, statement to the Studies and Economic Media Center (SEMC), 15 October 2026 (unpublished).

milled wheat were available in most monitored shops at approximately YER 50,000 per sack.⁶ This represents a decline of around 17% in flour prices over five days, although prices remained approximately 32% above pre-escalation levels, before the latest military escalation and the imposition of the siege on the city.

Table 1. Changes in Prices and Availability of Essential Commodities in Taiz

All prices are in Yemeni rials (YER). USD 1 = YER 1,564.

Commodity (Unit)	Before Escalation	Early October (Second Briefing)	12 October	17–21 October
White flour (50 kg)	38,000	Unavailable in most monitored shops	60,000 (in some shops)	50,000 (in most shops)
Milled wheat (50 kg)	42,000	Approximately 55,000 (limited quantities)	Unavailable in most shops	50,000 (in most shops)
Petrol (20 litres)	30,000	More than 100,000	90,000	60,000–65,000
Diesel (20 litres)	44,000	50,000 at some stations, then approximately 90,000 on the black market	80,000–90,000	70,000
Domestic LPG (cylinder)	11,000	More than 30,000	30,000–35,000	25,000–40,000

On 17 October, other commodities were also available in most shops: rice at YER 22,500 per 10 kg, sugar at YER 13,500 per 10 kg, and cooking oil at YER 19,500 per four litres. Vegetable prices remained at their previous levels, with potatoes and tomatoes each selling for YER 27,000 per 20-kg crate. The increase in onion prices, to approximately YER 60,000, predated the escalation and was attributed by traders to export difficulties through the Al-Wadee'ah border crossing.⁷

Nevertheless, the volume of goods reaching the city remains small relative to residents' needs. Assuming that all the sacks in the reported shipment weighed 50 kg, the maximum possible estimate, the shipment would amount to approximately 580 tonnes. This represents roughly half of the daily wheat and flour consumption projected in the official emergency plan for districts under government control, which

⁶ SEMC field monitoring, 10–21 October 2026, *ibid.*

⁷ SEMC field monitoring, 10–21 October 2026, *ibid.*

estimates daily requirements at around 1,040 tonnes, out of a total requirement of 189,000 tonnes over six months.⁸

B. Fuel and Cooking Gas: Lower Prices Amid Irregular Supplies

Black-market fuel prices declined during the monitoring period, although from exceptionally high levels recorded in the first week of October. Petrol prices fell from YER 90,000 per 20 litres on 12 October to YER 60,000 on 17 October, while diesel prices dropped from YER 80,000–90,000 to YER 70,000.⁹ Based on the figures documented in the SEMC's second briefing, petrol prices remain approximately twice their pre-escalation level.

The SEMC's monitoring team observed that the petrol available on 17 October was yellow in colour. Sellers claimed that it was imported from Iran and used in areas under Houthi control. Some of the available fuel is likely to be entering the city across front lines through unofficial channels.¹⁰

The domestic LPG crisis remained the most acute and visible fuel shortage. Cylinders sold for between YER 25,000 and YER 30,000, occasionally reaching YER 40,000.¹¹ Thousands of households resorted to using firewood for cooking.

On 19 October, the first gas tanker since the beginning of the month arrived at Al-Jabal Gas Station in Wadi Al-Qadi, Taiz city. The arrival triggered a rush among residents, and the entire supply was depleted that same day. Local allegations also emerged that gas tankers destined for Taiz were being held in Lahj Governorate.

These developments indicate that the decline in black-market prices does not reflect the restoration of regular domestic cooking gas supplies through official routes. Instead, supplies continue to reach the city through costly smuggling channels that could be disrupted at any moment.

C. Trader Confidence: The Deeper Impact of Repeated Closures

The crisis in Taiz is having effects that extend beyond rising prices to the disruption of economic activity itself. In a statement to the Center on 21 October, the Taiz Director of the Industry and Trade Office described the improvement in the availability of supplies as “very temporary.” He said that closing the only supply route “every day or two” heightens traders’ concerns and pushes them towards shifting “from investment to hoarding,” abandoning commercial activity altogether, or

⁸ Taiz Industry and Trade Office, *Alternative Plan for Addressing the Worst-Case Scenarios ... for Six Months*, attached to Taiz Governor's Letter No. 1067, dated 8 October 2026.

⁹ SEMC field monitoring, 10–21 October 2026, *ibid.*

¹⁰ SEMC field monitoring, 10–21 October 2026, *ibid.*

¹¹ SEMC field monitoring, 10–21 October 2026, *ibid.*

relocating elsewhere. It also forces them to reduce supply orders and postpone shipments.¹²

From an economic perspective, intermittent closures increase the risk premium on every shipment. Traders cannot predict whether their trucks will be allowed through on a given day, how long they will have to wait, or whether their goods will spoil. Market mechanisms therefore encourage smaller, less frequent shipments with higher profit margins. As a result, the siege causes shortages and price increases even on the exceptional days when the road is open.

If this pattern persists, Taiz's residents will face risks extending beyond the absence of essential goods to the erosion of the city's commercial and investment base. Meanwhile, the cost of basic food baskets and fuel remains substantially higher than before the escalation, with no observed improvement in incomes. The heaviest burden therefore falls on low-income households, daily wage workers, and displaced people, most of whom have lost their sources of income and are unable to meet their basic daily needs.

4. Humanitarian Impacts

A. Displacement

On 13 October, the International Organization for Migration (IOM) reported that 217,303 people (36,216 households) had been displaced since the start of the escalation through 12 October, compared with 201,217 people as of 7 October, according to the SEMC's second briefing. Taiz Governorate accounted for 55% of those displaced. Jabal Habashi (32,346 people), Al-Ma'afer (31,230), and Al-Shamaytayn (24,942) remained the most affected districts, all of them rural districts outside the city. The IOM also highlighted the difficulty of accessing most displacement sites in Taiz.¹³

On 20 October, the United Nations High Commissioner for Refugees (UNHCR) estimated that more than 250,000 people had been displaced in Yemen between 1 August and 17 October. Taiz accounted for 76% of those displaced and was the destination for 52% of newly displaced people.¹⁴ The two figures cannot be directly compared because they cover different monitoring periods and use different methodologies.

¹² Director of the Industry and Trade Office in Taiz city, statement to the Studies and Economic Media Center (SEMC), 21 October 2026 (unpublished).

¹³ International Organization for Migration (IOM), Displacement Tracking Matrix data through 12 October 2026, announced on 13 October and reported by UNI News Agency: <https://www.uniindia.com/world/yemen-217k-people-displaced/214221>

¹⁴ United Nations High Commissioner for Refugees (UNHCR), statement on displacement in Yemen between 1 August and 17 October 2026, 20 October 2026.

B. Food Security and Humanitarian Assistance

On 14 October, the World Food Programme (WFP) announced that it and its partners could no longer reach more than 600,000 people in Taiz who depend on humanitarian assistance, including over 200,000 women and children. The total number of people who could not be reached across Taiz and the West Coast reached approximately 800,000.

The WFP warned that it would significantly reduce assistance from November unless it secured additional funding, estimating that it required USD 268 million through 2027.¹⁵

This means that the return of commodities to shops is not translating into improved access for the poorest households that previously depended on humanitarian assistance, as purchasing goods requires financial resources that these families no longer have.

C. Water and Health

On 18 October, the local authorities accused the Houthi group of preventing drinking-water tankers supplied by wells in Al-Dhabab from passing through its military checkpoints. They also accused the group of preventing waste from being transported to the designated temporary landfill, warning of the resulting health and environmental consequences.¹⁶

On 20 October, media outlets quoted the United Nations Humanitarian Coordinator in Yemen as saying that water production in the city had fallen by half, while the prices of available food and fuel had risen to more than twice their previous levels. The health sector, he warned, was on the verge of collapse because of shortages of electricity and oxygen.¹⁷

In the health sector, the Taiz Health Office warned on 13 October that stocks of medicines, medical solutions, and fuel had reached critically low levels, threatening the lives of 1,110 kidney failure patients and 192 patients in intensive care.¹⁸

On 14 October, the International Committee of the Red Cross (ICRC) noted that Taiz was among the areas bearing the heaviest burden of casualties. Some medical

¹⁵ World Food Programme (WFP), 14 October 2026, *ibid*.

¹⁶ Taiz Governorate Local Authority, statement concerning the prevention of water tankers supplied by Al-Dhabab wells from entering the city and restrictions on waste transportation, 18 October 2026.

¹⁷ United Nations Humanitarian Coordinator in Yemen, statement on the situation in Taiz, 20 October 2026, as reported by media outlets and monitored by the SEMC's team.

¹⁸ Taiz Governorate Public Health and Population Office, warning regarding the depletion of medicines, medical supplies, medical solutions, and fuel in health facilities, 13 October 2026.

facilities near front lines had treated more than 700 cases in a single week, amid shortages of surgical supplies, anaesthetics, and oxygen.¹⁹

5. Outlook for the Next Two to Four Weeks

Scenario	Conditions	Expected Impact
1. Continuation of the current pattern of fighting and siege	Al-Dhabab Road continues to open briefly and irregularly each day, with no changes to other access routes.	Fluctuating food availability amid high prices; a gradual decline in import volumes; recurring cooking gas and fuel shortages; and a widening assistance gap affecting the most vulnerable households.
2. Intensification of the siege and shelling	Complete closure of the road for several days, accompanied by military escalation along the Al-Dhabab axis.	Rapid depletion of available commodities, a return to early-October price levels, and severe pressure on water supplies and hospitals.
3. Establishment of a regular humanitarian and commercial corridor	An announced and guaranteed arrangement providing fixed crossing hours for trucks.	Restoration of traders' confidence, replenishment of stocks, and a gradual decline in prices towards pre-escalation levels.

The Center considers the first scenario the most likely, given the escalation of attacks by the Houthi group against the city from surrounding fronts and the efforts of government forces and the Popular Resistance to repel them. There are no clear indications that the fighting will be resolved soon or that an agreement on humanitarian and commercial corridors will be reached.

¹⁹ International Committee of the Red Cross (ICRC), "Yemen: Health system faces mounting pressure as fighting intensifies," 14 October 2026: <https://www.icrc.org/ar/article/yemen-health-system-faces-mounting-pressure-fighting-intensifies>

6. Urgent Recommendations

Priority	Recommended Action	Responsible Parties
Immediate	Agree on fixed, publicly announced crossing hours on Al-Dhabab Road for trucks, water tankers, patients, and civilians, replacing intermittent openings. Ensure that water tankers are not obstructed and that waste can be transported to the designated disposal site outside the city.	Houthi group; Office of the UN Special Envoy; UN Humanitarian Coordinator, for negotiations and monitoring.
Immediate	Allocate diesel from any supplies entering the city to water pumps and hospitals, and provide medicines and medical solutions for kidney failure patients and those in intensive care.	Local authorities; World Health Organization (WHO); International Committee of the Red Cross (ICRC); United Nations Office for Project Services (UNOPS).
Urgent	Establish a transparent rationing and distribution mechanism for domestic cooking gas when tankers arrive to prevent crowding and hoarding. Investigate the whereabouts of detained tankers and ensure that all quantities allocated to the governorate reach their intended destinations.	Local authorities; Yemen Gas Company.
Urgent	Secure emergency funding to prevent reductions in WFP distributions in November, including the provision of cash assistance, particularly given the relative availability of commodities in local markets.	Donors; World Food Programme (WFP).
Short term	Provide traders with guarantees, including shipment insurance or credit facilities, to reduce risk premiums and encourage continued supply. Publish weekly data on commodity stocks.	Industry and Trade Office; Chamber of Commerce and Industry; Central Bank.



The **Studies & Economic Media Center (SEMC)** is one of Yemen's leading civil society organizations. Established in 2008, SEMC has extensive experience in promoting good governance, transparency, civic participation, evidence-based advocacy, media development, and the economic and social empowerment of youth and women.

SEMC seeks to contribute to improving Yemen's economic system by making it more transparent and equitable. It works to advance the principles of transparency, good governance, and citizen participation in decision-making; support the development of a free, professional, and independent media sector; strengthen the economic and social empowerment of women and youth; and mitigate the impact of conflict on development pathways while contributing to sustainable peace.

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