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Taiz Under Siege

A Brief Respite in Supplies Undermined by a Complete Closure of Roads

November 2026

Briefing Paper:

Taiz Under Siege:

A Brief Respite in Supplies Undermined by a Complete Closure of Roads

Fourth Briefing Since the Beginning of the Latest Military Escalation in Taiz Governorate — November 2026

Monitoring period: 24 October – 8 November 2026

Building on the Third Briefing, issued on 21 October 2026

Studies and Economic Media Center (SEMC)

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Key Findings of the Fourth Briefing:

- **Temporary respite**: On 31 October, the sale of petrol through official fuel stations began in Taiz city at a price of YER 34,500 per 20-litre container (YER 1,725 per litre), following weeks of dependence on the black market, where prices had reached YER 55,000 on 24 October. However, distribution remained subject to quotas, and the respite did not last a week before the crisis returned.
- **Complete closure:** On 2 November, the UN spokesperson announced that "all roads leading into the city are now closed due to fighting, and no commercial supplies are getting through." On 6 November, the Karba–Al-Suhi road, which connects Lahj and Taiz, was closed again after having been reopened for only two hours. The Hajjah Al-Abd road, meanwhile, had remained closed for more than a month.
- **Goods are now entering from the opposite direction at double the price:** The Director General of the Taiz Office of Industry and Trade reported that the flow of food, fuel, and LPG had "completely stopped", except for quantities arriving via the Al-Hawban–Al-Barh–Al-Bireen route at prices prevailing in areas under Houthi control, effectively double the prevailing prices in the city.
- **A significant supply gap in Taiz markets**: Official data reviewed by the SEMC show supply gaps of 88% for rice, 61% for cooking oil and ghee, and 100% for meat, fish, and cheese during the period from 1 to 20 October. The gaps also reached 96% for petrol, 98% for diesel, and 97% for domestic LPG.
- **Development projects suspended:** More than 15,000 households have lost their sources of income, 19 development projects have been suspended, and 15 agreements with INGOs have been disrupted. Twenty-one UN staff members have left, the UN office in the city has closed, and local revenues have virtually disappeared.
- **Essential services on the brink of collapse**: Water coverage in the city has fallen from 30% to 8.2%, approximately 250,000 people have lost access to basic healthcare, and 12 hospitals are at risk of closure. More than 1,400 cases of acute watery diarrhoea and suspected cholera were recorded in a single week, while 550–600 tonnes of waste accumulate daily, as the Houthi group continues to prevent waste collection trucks from reaching the designated disposal site outside the city.

First: What Has Changed Since the Third Briefing?

The third briefing issued by the Studies and Economic Media Center (SEMC) on 21 October 2026 described a situation characterized by a fragile improvement in the availability of supplies, alongside persistent bottlenecks affecting access routes to the city. Food commodities had returned to most of the monitored shops, thanks to limited shipments and traders' existing stocks. However, the Al-Dhabab–Taiz road remained the only operational land route, opening for only a few hours each day and being repeatedly closed.[1]

This fourth briefing covers the period from 24 October to 8 November 2026 and documents a different shift that unfolded in two stages. During the final week of October, the improvement in supplies widened: prices of several food commodities declined, a second tanker carrying domestic LPG entered the city, and on 31 October, gasoline began to be sold at official fuel stations at the approved price for the first time since the escalation began.

The situation then reversed within days. By early November, the remaining roads had been closed. On 2 November, UN spokesperson Stéphane Dujarric announced that "all roads into the city are now closed due to fighting, and no commercial supplies are getting through."[2]

The improvement observed in late October did not represent a recovery. Rather, it underscored the reality that the city had become dependent on a single corridor that could be closed at any moment, and that any improvement in prices or availability remained contingent on a military decision by the Houthi group, rather than on the restoration of supply chains.

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[1] Studies and Economic Media Center (SEMC), "Taiz Under Siege: A Fragile Improvement in the Availability of Supplies," Third Briefing, 21 October 2026.
[2] UN News, "World News in Brief: Healthcare Crisis in Yemen's Taiz and Afghanistan…," 2 November 2026. https://news.un.org/en/story/2026/11/1168723.

Second: Roads and Access – Closure of the Only Remaining Route

Taiz, Yemen's third-largest city, is located in the southwest of the country. It relies entirely on land routes connecting it to the port of Aden and the governorates of Lahj and Al-Turbah to secure food, fuel, LPG, and medicines. Since the military escalation began on 5 October 2026 and the Houthi group took control of districts surrounding the city, these routes have been progressively restricted, leaving the Al-Dhabab–Taiz road as the only remaining access route, open for intermittent periods of a few hours.

During the monitoring period, there were no indications that regular commercial traffic had been restored. Most main and secondary roads remained out of service, while the Al-Dhabab road continued to face repeated closures. SEMC's field team documented practices that directly increased transportation costs. Most notably, some trucks entering the city were forced, at the Jabal Habashi junction, to unload their cargo and transfer it to other trucks before being allowed to proceed into the city. This procedure adds both costs and delays to every shipment, with the additional burden passed directly on to consumers through higher commodity prices.[3]

Meanwhile, efforts were made during this period to bring essential goods into the city through exceptional arrangements. The local authorities in Taiz coordinated with the HSA Group to facilitate the entry of food commodities and petroleum products. They also contacted the International Committee of the Red Cross (ICRC) to facilitate the transportation to Taiz of quantities of fuel and cooking gas held in Aden and Lahj. These included approximately 1.5 million liters of gasoline, two million liters of diesel, and 52 tankers of domestic LPG.[4] On 4 November,

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[3] Field monitoring conducted by the SEMC's team in Taiz, 24–31 October 2026 (unpublished preliminary field evidence; source identities withheld for protection reasons).

[4] Taiz Governorate Office of Planning and International Cooperation, Report on the Impacts of the Siege, reviewed by SEMC, October/November 2026 (unpublished document).

the ICRC announced that four trucks carrying surgical kits and essential medical supplies had entered the city.[5]

However, these arrangements did not translate into a sustained flow of the food and medicine needed by residents. In a statement to SEMC, Abdulrahman Al-Qulaia, Director General of the Taiz Office of Industry and Trade, said that conditions "had begun to improve somewhat." However, the closure of the Heijat Al-Abd and Karbah roads had brought "the flow of food commodities, fuel, and LPG to a complete halt," except for limited quantities arriving through the Al-Hawban–Al-Barh–Al-Bireen route. These supplies, he explained, were sold "at prices prevailing in the non-liberated areas [areas under Houthi control], at prices double those prevailing in the city."[6]

This account is consistent with reports by local media that the Houthi group had reclosed the Karbah–Al-Suhi road, which connects Lahj and Taiz governorates, on 6 November, after it had been opened for only two hours. The Heijat Al-Abd road, meanwhile, had remained closed for more than a month following the demolition of part of the road. Available alternatives, such as the Al-Qubaytah and Hayfan routes, are mostly rough, unpaved mountain roads, and the journey to Taiz along these routes takes more than twelve hours.[7]

This situation creates a complex market distortion that goes beyond supply bottlenecks. It also leads to price distortions, as commodity prices are determined by their place of origin, with transportation costs, security risks, and waiting times, which may extend for days, added to the final price. As a result, Taiz is being transformed from a market connected to a regular supply network into a city where prices fluctuate according to the source of goods. This represents a structural imbalance in the local economy and the functioning of its market.

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[5] Reuters, "Red Cross Delivers Essential Medical Supplies to Yemen's Besieged Taiz City," 4 November 2026.
[6] Statement by Abdulrahman Al-Qulaia, Director General of the Taiz Governorate Office of Industry and Trade, to the SEMC, documented on 8 November 2026.
[7] Al-Mushahid Net, "Houthi Group Recloses the Karbah–Al-Suhi Road Linking Lahj and Taiz Governorates," 6 November 2026. https://almushahid.net/146002/. SEMC has not independently verified these events through field monitoring.

Third: Economic Impacts

A. Food and Prices: A Relative Decline, but Still at Elevated Levels

SEMC's monitoring during the period from 24 to 31 October showed a continued, relative decline in the prices of several essential commodities compared with early October. A 50-kg bag of Al-Sanabel flour was priced at YER 46,500, while a 50-kg bag of wheat flour cost YER 45,500. A 10-kg bag of rice was priced at YER 22,000, a 10-kg bag of sugar at YER 13,300, and four liters of cooking oil at YER 12,800. Among vegetables, potatoes were priced at YER 1,200 per kilogram, tomatoes at YER 1,500, and onions at YER 2,500. A 20-kg sack of potatoes cost YER 20,000, while a 20-kg sack of tomatoes cost YER 25,000.[8]

The official price list issued by the Taiz Governorate Office of Industry and Trade on 2 November confirms this limited downward trend. It set the wholesale price of a 50-kg bag of Al-Sanabel flour at YER 44,000, mixed flour at YER 45,000, and a 10-kg bag of Brazilian sugar at YER 13,000. The price of a 30-kg sack of white onions was set at YER 45,000, down from YER 80,000 in the previous price list.[9]

Commodity (unit)	Before escalation	17–21 October (Third Briefing)	24–31 October (SEMC monitoring)	2 November (Official wholesale price list)
Al-Sanabel flour (50 kg)	38,000	50,000	46,500	44,000
Ground wheat flour (50 kg)	40,000	50,000	45,500	45,000

[8] SEMC field team monitoring, Taiz city, 24–31 October 2026, op. cit. The prices reflect the monitored points of sale and are not representative of the entire city.
[9] Taiz Governorate Office of Industry and Trade, "Prevailing Market Price List in Taiz Governorate for Monday, 2 November 2026," an official document signed and stamped, held by SEMC.

Rice (10 kg)	—	22,500	22,000	20,500–23,000
Sugar (10 kg)	—	13,500	13,300	13,000
Cooking oil (4 liters)	—	19,500	12,800	12,000
Gasoline (20 liters)	30,000	60,000–65,000 (black market)	55,000 (black market)	34,500 (official stations)
Diesel (20 liters)	44,000	70,000	50,000 (black market)	46,000
Domestic LPG (20-liter cylinder)	10,900	25,000–40,000	25,000 (black market)	9,500

Source: SEMC field monitoring; the Third Briefing; and the price list issued by the Taiz Office of Industry and Trade on 2 November 2026. All prices are in Yemeni rials (YER). Pre-escalation flour prices are based on information provided by shop owners. "—" indicates that no documented baseline price was available. Prices listed for 2 November are officially approved wholesale prices and do not necessarily reflect the prices actually paid by consumers at retail outlets or in the parallel market.

It is important to note that this improvement is measured against the sharp price increases resulting from developments in early October, not against the period before the latest military escalation. The price of a bag of flour recorded by SEMC in late October (YER 46,500) remained approximately 22% higher than its pre-escalation level (YER 38,000, according to shop owners, as documented in the Third Briefing). Moreover, the improvement occurred while shipments were still physically entering the city, a phase that ended with the closure of roads in early November. The UN Office for the Coordination of Humanitarian

Affairs (OCHA) estimates that prices of essential food commodities in the city have risen by at least 50% since the siege began.[10]

B. Supply Gap: The Key Indicator Behind Price Movements

Beyond price volatility, disruptions in supply represent an even more significant factor affecting residents. Monitoring identified a clear gap between actual commodity requirements and the quantities entering the city. Official data reviewed by SEMC, covering the period from 1 to 20 October, show that supply shortfalls were almost complete for most commodities, with only a small proportion of the city's needs being met by incoming supplies.

Commodity	Required quantity	Incoming quantity	Supply gap
Wheat	1,420 tonnes	3,734 tonnes	No gap recorded*
Rice	530 tonnes	61 tonnes	88%
Sugar	450 tonnes	305 tonnes	32%
Oil and ghee	1,460 tonnes	570 tonnes	61%
Cheese	71 tonnes	Zero	100%
Tuna	36 tonnes	0.09 tonnes	99.8%
Pasta	18 tonnes	0.13 tonnes	99%
Tomatoes	1,450 tonnes	800 tonnes	45%
Meat and fish	53.2 tonnes	Zero	100%

[10] Yemen Monitor, citing the UN Office for the Coordination of Humanitarian Affairs (OCHA), 3 November 2026. https://www.yemenmonitor.com/en/Details/ArtMID/908/ArticleID/186751.

Miscellaneous food products	216,000 cartons	10,320 cartons	95%
Beverages and juices	39,000 cartons	3,307 cartons	92%
Bottled water	80,000 cartons	6,185 cartons	92%
Spices	7,000 cartons	800 cartons	89%
Yogurt and fermented milk (laban)	75,000 cartons	10,890 cartons	85%

Source: Official data for the period from 1 to 20 October 2026, reviewed by SEMC.

This is consistent with the monthly requirements and strategic reserve stock statement issued by the Taiz Office of Industry and Trade on 4 November, which provides a clearer picture of the scale of the imbalance. Against a monthly requirement of 31,000 tonnes of wheat and flour, recorded stocks amounted to only 2,600 tonnes, while incoming supplies totaled 5,600 tonnes. For rice, against a requirement of 6,000 tonnes, only 95 tonnes had entered the city. As for domestic LPG, no reserve stock was recorded, despite a monthly requirement of 926,200 cylinders and incoming supplies of only 32,674 cylinders. The same applies to gasoline and diesel, for which no reserve stocks were recorded at all.[11]

Commodity	Monthly requirement	14-day requirement	Incoming quantity	Reserve stock
Wheat and flour (tonnes)	31,000	14,000	5,600	2,600
Rice (tonnes)	6,000	2,800	95	2,500

[11] Taiz Governorate Office of Industry and Trade, “Monthly Requirements and Strategic Reserve Stock Statement,” an official document signed on 4 November 2026 and held by SEMC

Sugar (tonnes)	5,400	2,500	550	2,000
Oil and ghee (tonnes)	2,700	1,300	384	1,300
Milk (tonnes)	10,200	4,700	580	4,200
Domestic LPG (cylinders)	926,200	432,000	32,674	None
Gasoline (liters)	550,000*	2,600,000	502,985	None
Diesel (liters)	350,000*	1,600,000	325,450	None

Source: Taiz Governorate Office of Industry and Trade, Monthly Requirements and Strategic Reserve Stock Statement, 4 November 2026. (*) Figures are reproduced exactly as they appear in the original document.

C. Petroleum Products and LPG: Continued Reliance on the Black Market

On 24 October, a 20-liter container of gasoline cost approximately YER 55,000, while the same quantity of diesel was priced at YER 50,000 on the black market. A cylinder of domestic cooking gas cost YER 25,000. On 31 October, gasoline distribution began at several official fuel stations in the city at an approved price of YER 1,725 per liter, equivalent to YER 34,500 for a 20-liter container. The distribution arrangements allowed each car to receive 20 liters and each motorcycle five liters, while filling jerrycans was prohibited.[12] A second tanker of domestic LPG also entered the city since the siege began, with cylinders sold at YER 11,500 each.

The difference between the official price (YER 34,500) and the black-market price (YER 55,000) just one week earlier was approximately 59%. This clearly reflects the scarcity of petroleum products reaching Taiz. Although the limited quantities were sold at lower prices, they were barely sufficient to meet the needs of private vehicles for a few days. They were

[12] SEMC field team monitoring, 24–31 October 2026, op. cit. The recorded retail price is consistent with the price list issued by the Taiz Office of Industry and Trade on 2 November (YER 1,725 per liter of premium gasoline and YER 2,300 per liter of diesel).

not enough to operate goods-transport trucks or power generators serving commercial establishments.

The scale of the structural imbalance is evident in the data for the period from 1 to 20 October: 128,735 liters of gasoline entered the city against a requirement of 3.5 million liters, representing a 96% shortfall. Similarly, 48,660 liters of diesel entered against a requirement of 2.22 million liters, representing a 98% shortfall. Only 25,788 cylinders of domestic cooking gas entered the city against a requirement of 950,000 cylinders, representing a 97% shortfall. These figures are consistent with the announcement made by the local authorities at a press conference on 28 October, which also reported the closure of 25 fuel stations and 30 gas distribution agencies.[13]

This partial improvement did not last. The Director of the Office of Industry and Trade reported that the volume of fuel delivered by the Yemen Petroleum Company before the road was cut amounted to approximately 230,000 liters, an amount that "does not cover even five days of demand." He added that the cooking gas currently entering the city was not coming from Aden at the official price, but was instead being supplied from areas under Houthi control at double the price. He also stated that gas supplied by the Yemen Gas Company had not entered the city "for approximately one month." Media reports on 4 November indicated that the remaining diesel stocks in the city would last for less than 48 hours.[14]

D. Commercial Activity, Sources of Income, and Local Revenues

The economic costs of war and the siege in Taiz are compounded by the damage inflicted on the foundations of local economic activity. According to data from the Taiz Office of Planning and International Cooperation, more than 15,000 LPG have lost their sources of income as a result of

[13] Press conference held by the ministers and governors of Taiz and Lahj in Aden, 28 October 2026, as reported by Yemeni media. https://yemenfreedom.net/view/34881.
[14] Al Jazeera, "Houthis' Month-Long Siege of Taiz," November 4, 2026.

disruptions to activities linked to transportation, water, fuel, and services, alongside declining commercial activity and rising prices.

Nineteen development projects have been halted, while 15 agreements or projects with international non-governmental organizations have been suspended. In addition, 21 UN staff members have left the city, and the United Nations office in Taiz has closed. The same data indicate that local revenues have effectively ceased, limiting the local authorities' ability to finance operating expenses and public services at a time when needs are escalating.[15]

This has created a clear vicious cycle: road closures increase transportation costs and reduce trade volumes, leading to a decline in tax revenues and local fees. This, in turn, weakens the local authorities' capacity to maintain waste collection and water services, increasing public health risks and placing further burdens on the very households that have already lost their income.

The cost of personal transportation has also risen sharply. The fare per passenger in shared vehicles traveling from Aden to Taiz increased from SAR 35 to SAR 100, nearly three times its previous level.[16]

The withdrawal of international actors, or their inability to access the city, further compounds these effects. The closure of the UN office and the suspension throughout October of humanitarian staff movements between Aden and Taiz mean not only a reduction in assistance, but also the loss of an external funding channel that had been injecting salaries and local procurement spending into a market already suffering from severe liquidity shortages.

[15] Taiz Governorate Office of Planning and International Cooperation, previous source.
[16] Al Jazeera, November 4, 2026, previous source.

Fourth: Humanitarian and Service-Related Impacts

A. Water, Environmental Sanitation, and Solid Waste Accumulation

Taiz city's daily water requirements are estimated at approximately 35,000 cubic metres. According to the local authorities, water coverage has declined from 30% before the siege to 8.2% since its imposition. This decline is attributable to the shutdown of three wells in the Al-Dhabab area, resulting in an estimated loss of 1.5 million litres of daily production, in addition to the loss of three million litres per day from privately operated wells in the same area, and reduced production from wells within the city due to diesel shortages.[17]

Historically, approximately 71% of the city's drinking water has depended on the Al-Dhabab well fields and surrounding water sources. This explains the severity of the impact when control over this area is lost or access to it becomes impossible. The price of a cubic metre of water delivered by tanker trucks has tripled, reaching approximately US$11 following the disruption of the main supply line. Meanwhile, existing rainwater reserves are estimated to be sufficient for only one to two weeks. With the approach of the winter dry season and the limited capacity of the Al-Dhabab aquifer, the water deficit is likely to widen further.[18]

Solid waste has now become one of the most serious public health threats. The city generates between 550 and 600 tonnes of waste daily, equivalent to approximately 16,500–18,000 tonnes per month. Since October 5, sanitation vehicles have been unable to reach the main landfill located west of the city, after the Houthi group prevented waste collection trucks from accessing the designated landfill outside the city. This has been compounded by the depletion of the fuel needed to operate the vehicles. Waste has consequently accumulated in streets,

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[17] Aden Press Conference, October 28, 2026, previous source.

[18] Yemen Monitor, citing the Office for the Coordination of Humanitarian Affairs (OCHA), November 3, 2026, previous source.

markets, residential neighbourhoods, and floodwater drainage channels. Residents have resorted to burning it, generating clouds of black smoke over neighbourhoods such as Asifrah.[19]

The risks posed by this situation extend beyond direct pollution. The local authorities are currently disposing of waste in floodwater drainage channels. These are critical pathways, and their blockage could divert rainwater into residential neighbourhoods when the rainy season begins, potentially causing widespread damage. The local authorities have allocated YER 10 million and quantities of diesel to support emergency sanitation activities and identify alternative waste disposal sites. However, these resources are insufficient to address the existing shortfall. This situation coincides with the reporting of more than 1,400 cases of acute watery diarrhoea and suspected cholera within a single week.[20]

B. Health: From Supply Shortages to Service Disruption

Twelve hospitals and 18 health centers in the city face the risk of reduced services or complete shutdown, while 120 health facilities have ceased operations entirely and another 66 have partially suspended services in districts controlled by the Houthi group. Medical stocks have declined to 30% of requirements for emergency medicines, 5% for fuel, and 2% for oxygen. In addition, 15 ambulances and 22 intensive care unit (ICU) beds have been affected.[21]

The most pressing threat to the continuity of healthcare services concerns the two dialysis centres, which provide approximately 6,300 sessions per month to around 1,110 patients, in addition to 192 ICU patients and 154 newborns dependent on incubators. Available data indicate that patients require approximately 210 dialysis sessions daily, a

[19] Al Jazeera, “Waste Burning Chokes Besieged Taiz City,” November 5, 2026.
[20] Overview of the Humanitarian Situation in Taiz,” previous source.
[21] UN News, November 2, 2026, previous source. The available sources do not specify whether this figure refers specifically to Taiz city or to a wider geographical area.

level of demand that cannot withstand any interruption in fuel or dialysis solutions.[22]

On November 2, the Office for the Coordination of Humanitarian Affairs (OCHA) reported that approximately 250,000 people had lost access to basic healthcare in the besieged city, including more than 186,000 children under the age of five and 23,000 pregnant women. It also reported that 12 hospitals were at risk of closure or had already reduced their services due to shortages of fuel and essential medical supplies.[23] In a more recent assessment, the Deputy Governor of Taiz for Health Affairs reported that approximately 40% of hospitals had closed their doors, while those remaining operational were functioning at half capacity due to fuel shortages. OCHA is coordinating with health partners on a 90-day emergency plan to maintain life-saving services.

C. Displacement, Education, and Humanitarian Assistance

In its statement issued on November 1, the International Organization for Migration (IOM) recorded the displacement of 300,391 people (50,059 households) since the escalation began in June. Of these, 299,335 people were displaced between early August and October 31. Taiz Governorate accounted for the largest share, with approximately 133,800 people, representing 45% of the total, followed by Lahj (24%) and Aden (19%). These figures continue to rise. On November 8, OCHA reported that the total number of displaced people had reached approximately 313,000 since early August, with Taiz accounting for around two-fifths of the total.[24]

Within Taiz city itself, government data indicate that 9,082 displaced households are residing across the city's three urban districts and two neighbouring districts. The majority are concentrated in Al-Mudhaffar District (5,868 households), followed by Al-Qahirah (1,313), Salh (470),

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[22] Aden Press Conference, October 28, 2026, previous source.

[23] Overview of the Humanitarian Situation," previous source.

[24] Xinhua, citing the Office for the Coordination of Humanitarian Affairs (OCHA), November 3, 2026.

Saber Al-Mawadem (729), and Mashra'a Wa Hadnan (702).[25] The Joint Response Team estimates that continued escalation and access restrictions could displace as many as 130,000 households towards Taiz city, a scenario that would exceed the city's current absorption capacity several times over.[26]

In the education sector, a total of 539,051 male and female students across the governorate have been affected, including 452,664 students in basic education and 86,387 in secondary education. In addition, educational activities have been disrupted at nine public and private universities, which collectively enrol approximately 45,000 students. Educational services across the governorate were suspended in early October, and the government launched remote learning in an effort to prevent the loss of the academic year. Furthermore, the use of schools as temporary shelters by some displaced families is reducing the educational space available to students.

Regarding the humanitarian response, on October 17, the World Food Programme (WFP) shifted from in-kind assistance to emergency cash assistance, targeting approximately 21,833 households (around 132,000 people) in the districts of Al-Qahirah, Al-Mudhaffar, Saber Al-Mawadem, and Salh. The transfer value was increased in response to rising prices. Meanwhile, multipurpose cash assistance programmes have reached 7,585 households, with plans to cover an additional 12,727 households.

However, the shift to cash assistance involves an economic paradox that must be clearly addressed: injecting liquidity into a market with constrained supply increases effective demand without increasing the quantities of goods available. This could accelerate the depletion of existing stocks and drive prices higher. Accordingly, the effectiveness of cash assistance in Taiz depends on its being accompanied by the actual reopening of supply channels, as well as close monitoring of prices and

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[25] International Organization for Migration (IOM) – Displacement Tracking Matrix (DTM), statement dated November 1, 2026, as reported by media outlets.

[26] Prensa Latina, citing the Office for the Coordination of Humanitarian Affairs (OCHA), November 8, 2026.

stocks. Otherwise, it risks generating additional inflation whose burden will ultimately fall on the beneficiaries themselves. The Food Security and Agriculture Cluster has reduced the contents of the food basket by removing sugar to expand the number of beneficiaries. This measure reflects resource constraints rather than an improvement in the situation.

Fifth: Outlook for the Next Two to Four Weeks

Developments in the crisis over the coming period will depend on three factors: the regularity of incoming goods and petroleum products, the easing of road restrictions, and the ability of local authorities and humanitarian agencies to expand the scope of their response. The following table outlines three possible scenarios.

Possible scenario	Conditions and indicators	Expected impact
1. Continued closure (most likely)	The continued closure of the Haijat Al-Abd and Karbah roads, with continued reliance on the Al-Hawban–Al-Barh–Al-Bireen route.	Rapid depletion of already limited stocks; prices returning to early October levels; a widening price gap between Taiz and Aden; and the suspension of health and water services due to diesel shortages.
2. Intermittent partial easing	Limited and intermittent reopening of one of the roads, allowing irregular deliveries of fuel and goods.	Temporary improvements in availability, while prices and supply gaps remain high; traders continue to refrain from building up stocks.
3. Regular and officially announced corridor	An announced and guaranteed arrangement establishing fixed crossing hours for commercial and humanitarian trucks,	Gradual restoration of traders' confidence, replenishment of stocks, a decline in prices towards pre-escalation levels, and the resumption of

	water tankers, and ambulances.	humanitarian operations at full capacity.

The SEMC considers the first scenario the most likely over the next two weeks, given that the closures in early November affected all remaining roads and that any recorded opening up to the date of this briefing had lasted no more than two hours. This means that the easing witnessed in late October should not be interpreted as an indication of sustained improvement.

The SEMC recommends tracking the following early warning indicators on a weekly basis:

- Number of hours during which roads remain open and the actual number of trucks entering the city.
- Price of a sack of flour (warning threshold: exceeding YER 55,000).
- Price of a gas cylinder in the parallel market (warning threshold: exceeding YER 30,000).
- Diesel stocks available for water pumps and hospitals.
- Number of dialysis sessions delivered compared with the number required.
- Weekly number of acute watery diarrhoea cases.

Sixth: Urgent Recommendations

Priority	Required action	Responsible entities
Very urgent	Reach a publicly announced and monitored arrangement to reopen the roads leading to the city, establishing fixed crossing hours for commercial and humanitarian trucks, water tankers, and ambulances, and ending the	United Nations and the Office of the Special Envoy; forces controlling the areas on both sides; influential countries and the European Union.

	practice of forcing trucks to unload their cargo at crossing points.	
Very urgent	Facilitate the transportation of supplies already available in Aden and Lahj (approximately 1.5 million litres of petrol, two million litres of diesel, and 52 gas trailers), and ensure their safe and regular delivery.	Yemeni Government; International Committee of the Red Cross (ICRC); Logistics Cluster.
Very urgent	Allocate a guaranteed and publicly announced share of any diesel entering the city to hospitals, dialysis centres, water wells, and sanitation vehicles before distribution to the general market.	Local authorities; World Health Organization (WHO).
Urgent	Address the waste crisis by halting waste disposal in floodwater drainage channels before the rainy season, securing an alternative disposal site, providing fuel and incentives for sanitation workers, and curbing open waste burning.	Cleaning and Improvement Fund; local authorities.
Urgent	Ensure that any expansion of cash assistance is accompanied by supply-side measures and weekly monitoring of prices and stocks, in order to avoid accelerating the depletion of goods and driving prices higher.	World Food Programme (WFP); humanitarian and development organizations.
Urgent	Publish regular, publicly accessible data on incoming and distributed quantities and distribution areas;	Office of Industry and Trade; Yemen Petroleum

	monitor prices and prevent monopolistic practices, thereby narrowing the gap between official prices and parallel-market prices.	Company; regulatory authorities.
Medium-term	Support households that have lost their sources of income (more than 15,000 households) and affected small businesses; resume suspended development projects; and provide guarantees or credit facilities to reduce the risk premium on traders' shipments.	Government and donors; Chamber of Commerce and Industry; Central Bank; local and international organizations.

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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.

Yemen - Taiz - Wadi Al Dahi St.

00967 -4- 239206

www.economicmedia.net

economicmedia@gmail.com

@Economicmedia

@Economicmedia