Economic Indicators Report Yemen



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Introduction

Yemen is experiencing economic deterioration due to the war that has been raging on in the country for almost two years, causing an economic and humanitarian disaster that hits the bulk of the population in urban and rural areas. This is evident in the state's inability to pay the salaries of both civilian and military employees for the last quarter of 2016, the depletion of foreign reserves, and the growing numbers of people in need of humanitarian assistance -82% of the population.

Yet, the year 2016 has seen a relative improvement in the economic situation as compared to 2015 due to the restoration of peace in some cities, and the availability of basic commodities, mainly oil products. Still, the gross domestic production deficit rate has maintained a downward trend, ranging between 10-15%, according to SEMC estimates. Indeed, some economic sectors are still fully or partially paralyzed. Despite the rising inflation rate that averagely reached 30% in 2015, basis commodity prices rose in 2016 by 30% on average as shown in the center's reports.

SEMC's 2016 economic indicator report, which has been prepared by the center for the second consecutive year, shows the most significant indicators on the economic and humanitarian situation in Yemen, and touches upon the political situation and the peace talks between the legitimate government and the Houthi and Saleh militias that seized power on September 21, 2014, in addition to the two sides' military influence and control map.

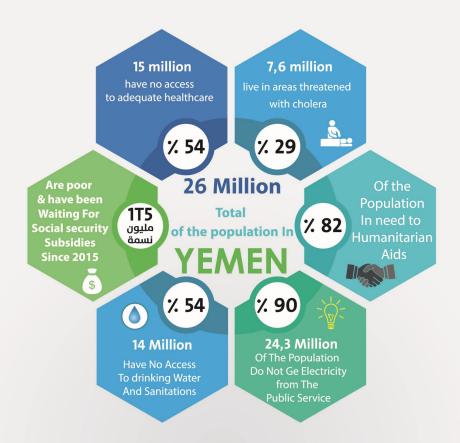
This report outlines the field monitoring conducted by the center in 2016, which gives a clear picture of the country's political, economic and security situation. We seek to keep the reader posted on the current situation in Yemen including by summarizing the most significant indicators of concern to citizens, such as the prices of basic commodities and services, namely water, electricity, health and education

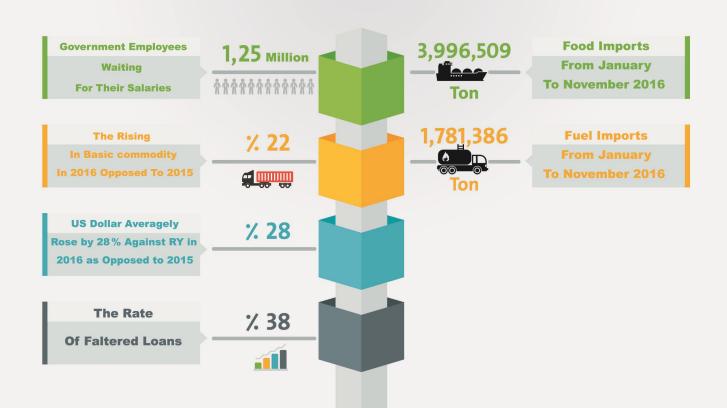
About SEMC

The Studies and Economic Media Center (SEMC) is one of the most prominent Yemeni NGOs that works on , and spreads awareness of economic issues, in addition to buttressing good governance and public engagement in decision making, and towards working the creation of professional media

The Center has contributed tremendously to debating and rectifying economic policies, divulging the loopinherent in the holes country's economic performance, and influencing decision makers in such a way that serves the think-tank's visionа transparent and flourishing Yemeni economy. Further, it has assumed a vital role in presenting economic information to society in a plain and simple manner.

The Center seeks to forge ahead with its cognitive mission despite the harsh conditions Yemen is experiencing.





Political situation

The year 2016 has seen multiple political developments in Yemen, with the civil war triggered by the Houthis' takeover of Sana'a almost three years ago, still raging on. Most significant of such developments was the formation by president Hadi of a new government as well as the removal of the vice president and appointment of a replacement. Further, the Houthi group and their key ally, Saleh, formed the so-called "political council" and national salvation government.

In March 2016, the Riyadh-based Yemeni political parties announced a national coalition as a national political entity which they said aims at ending both the coup and mutiny staged against the legitimate government by the Houthi and Saleh militias and the restoration of the hijacked Yemeni state. Unfortunately, however, this coalition ended up in failure.

In early April, President Hadi issued presidential decrees removing his deputy and the prime minister, Khaled Bahah, and instead naming Ahmed Obaid Bin Dhager premier and Gen. Ali Mohsen Al-Ahmar, the deputy commander-in-chief of the armed forces, vice president.

In July, the Houthis and former President Saleh's party, the GPC, sealed a deal that stipulated the formulation of a higher political council to allegedly steer the nation's affairs. The council comprised 10 members, half of them Houthis while the others are Saleh loyalists. Yemen peace sponsors dismissed the move as a serious, unilateral step that undermines peace. Under the

agreement, Saleh became the key ally of the Houthis who staged a putsch against President Hadi and his government when they descended on the capital Sana'a on September 21,2014. The formation of the political council marked an end to the rule of the revolutionary committees headed by Mohammed Ali Al-Houthi, which reigned supreme in the areas under the group's control.

Following the establishment of the body, headed by Saleh Al-Samad, a Houthi leader, there has been formed the national salvation government, half of its members Houthis and the others are affiliated with Saleh's party, the GPC. Subsequently, MPs loyal to both parties were invited to parliament to approve the newly-formed cabinet.

However, not even a single country has recognized this government, which is still forcibly operating in the areas held by Saleh and Houthi militias.

President & government

Ruling from interim capital, Aden

The return to Aden of the legitimate government marked a turning point in the performance of the government that kept operating for months from the Saudi capital, Riyadh. Further, President Hadi's comeback to Aden gave a positive impression that the political situation was improving, particularly in the liberated provinces.

Collapse of peace talks

The year 2016 saw several rounds of peace talks, most significant of which were the Kuwait peace negotiations which came to a dead end as the conflict parties failed to reach a peaceful solution to the standoff.

Zahran Al-Janoob peace talks

In March 2016, a Houthi delegation headed for the city of Zahran, South of Saudi Arabia, to hold direct talks with Saudi officials as the truce announced by the two sides on common borders, was still in force. The talks, the first ever between the two sides since the outbreak of the war in March 2015, led to the two belligerents announcing both a ceasefire on common borders and a prisoner swap. Yet, the truce was shortlived, as fresh fighting erupted on the Yemeni-Saudi border.

Kuwait talks

The UN Special Envoy to Yemen, Ismail Ould Cheikh, made back and forth shuttles to Sana'a and Riyadh and other Arab capitals to resume the Yemeni peace talks. It was later agreed that Kuwait will play host to such talks, which were scheduled to kick off on April 18, 2016. But, the negotiations were adjourned to April 21 as the Houthi and pro-Saleh delegation didn't arrive on schedule.

The Houthi delegation to the threemonth talks was headed by Mohammed Abdul Salam while the government's was led by Abdul Malik Al-Meghlafi. The delegates were always at odds, with negotiators walking out of the talks several times only to be brought back to the negotiable table thanks to efforts made by Kuwait's emir, Sheikh Sabah Al-Ahmed Jaber Al-Sabah and the group 18 ambassadors overseeing the efforts at the political settlement in Yemen. On one occasion, the emir of Qatar, Sheikh Tamim Bin Hamad Al Thani, stepped in to bring the government's delegation, , back to the negotiating table, after it had staged n a five-day walkout in protest of the Houthis' takeover of a military camp in Amran province.

The negotiations mainly focused on the Yemeni government's demands for the enforcement of the UN Security Council resolution 2216 providing for the Houthis' pullout of key cities and state institutions, the handover of heavy weapons, and the release of all prisoners as a precondition for any political solution. The Houthis, however, insisted that a national unity government be formed as a prerequisite for any withdrawal.

Such disagreements continued over the course of the negotiations that came to an end in early August, 2016, as the two parties failed to reach a solution. The talks were declared over after the Houthis and their allies announced the establishment of a political council to run the country.

Kerry's initiative

Following the breakdown of the Kuwait talks, US State Secretary, John Kerry, as well as Ould Cheikh embarked on trips to the Gulf countries involved in the

Operation Decisive Storm, plus Oman hosting the Houthi and pro-Saleh delegates who couldn't come back to Sana'a at the time due to the closure by the Arab Coalition of Sana'a airport with an aim to resume the dialogue.

On August 25, 2016, Kerry announced a new peace plan for Yemen. The roadmap, announced in a press a conference involving both Kerry and his Saudi counterpart, Adel Al-Jubair, stipulated the formation of a national unity government involving all stakeholders, the Houthis' withdrawal from Sana'a and

other key cities, and their handover of heavy weapons, including ballistic missiles, to a third party, President Hadi's handover of power to a consensus president, and the securing of the Saudi border. After heated debates over Kerry's blueprint, the UN came up with a new peace plan which was conditionally accepted by the Houthis and Saleh but rejected by the Yemeni government that proposed a set of amendments thereto. With the end of 2016, the talks ended up in failure.

Mapping Yemen conflict

The Yemeni government recaptured several Yemeni provinces in 2016. Pro-Hadi troops retook the city of Mukalla in Hadhramout province, Zinjibar in Abyan and Hutta in lahj from Al-Qaeda group. They also restored some Aden neighborhoods, such as Mansurah, from the group's hardliners. The city of Aden saw suicide bombings claimed by extremist Islamic groups despite the relative improvement in the security situation.

Though pro-Hadi troops had retaken some districts in Al-Jawaf province and large swaths of territory in Taiz, in addition to some areas in Al-Baydha, Hajja and Sana'a provinces, let alone opening new war fronts in Sa'ada, the Houthis and pro-Saleh militias are still in control of most northern provinces, formerly known as the Arab Republic of Yemen.

Azzal region

The Azzal region includes the provinces of Sana'a, Sa'ada, Amran, and Dhamar, which are still under Houthi control, except for some area in the northern province of Sa'ada, the Houthis' key stronghold, where the pro-Hadi army managed to recapture Aulab and Bu-qa'a border crossings, and the bulk of Mandaba area in Baqem district, a strategic area overlooking Sahar al-Sham villages, Baqem highway, and Al-Shaear mount. The other areas in that

same province are still being controlled by the Houthi group.

As for Sana'a, the government troops have closed in on the eastern part of the city, as they seized large swaths of Nihim district.

Sheba region

This region includes the provinces of Mareb, Al-Jawf and Al-Baydha. The pro -Hadi army is in full control of the city of the city of Mareb, the provincial capital of Sheba region, except for some parts of Serwah district, which are still being controlled by Houthis and pro-Saleh troops.

With regard to Al-Jawf to the northeast of Sana'a, the government army is in control of 85% of the province, including its capital, Al-Hazam, Al-Ghail and Al-Safri, and 50% each of al-Mutun, al-Maslub, Khab, and the northern district of al-Sha'af to the north, the largest ever in the province in terms of land mass. The Houthis and pro-Saleh forces are still in control of the districts of Al-Matama, Al-Zaher, and 50% each of Mutun, khab, Sha'af and Maslub.

Still, fierce battles are still raging on in Al-Baydha province to the southeast of Sana'a between Houthis and loyals on the one hand, and pro-Hadi troops on the other. The Houthis are still controlling the majority of the province's areas, with the exception of a number of positions in some areas held by progovernment troops.

Tihama region

This region includes the provinces of Hodeida, Hajja, Mahweet and Raimah. All Tihma provinces are still under the control of the Houthi and Saleh militias, with the exception of the port city of Maidi and Haradh crossing point on the border with Saudi Arabia. The region is still witnessing ongoing military operations conducted against the rebels by the Arab coalition troops. These operations mainly focus on the coastal province of Hodeida, where the city port of Hodieda, the country's second largest, is located, in addition

to the province of Hajja to the north-west of Sana'a, which has recently seen massive military operations in the districts of Maidi and Haradh on the Yemeni-Saudi borders.

Taiz region

This region includes the provinces of Taiz and lbb. The Houthis and pro-Saleh forces are in control of the bulk of lbb province as well as some parts and districts of Taiz province which is experiencing daily clashes. The pro-Hadi troops are controlling most of the city parts, in addition to Al-Mawadem and Misrakh districts, except for some positions to the east of Saber al-Mawdam and south of Misrakh, as Houthis are still in control of Shagab and al-Agroodh sub-district close to Khadir district. The pro-Hadi troops are in control of Al-Sarari district in Saber al-Mawadem to the south of Taiz, as well as Wadi al-Dhabab area- the only crossing point leading to the city of Aden.

Further, the pro-Hadi troops are also in control of the districts of Al-Mawasit, al-Ma'afir, al-Shamaytin in Hujariyah, Mashra'ah and Hadnan to the south of the province. The Houthis and Saleh troops are controlling the districts of Muza'a, Mocca coastline, Thubab, Al-Waziayeh, Haifan, Khadir and Janad. Other areas, including Shara'ab Al-Salam, Shara'ab Al-Rawna and Same'a have so far seen no fighting.

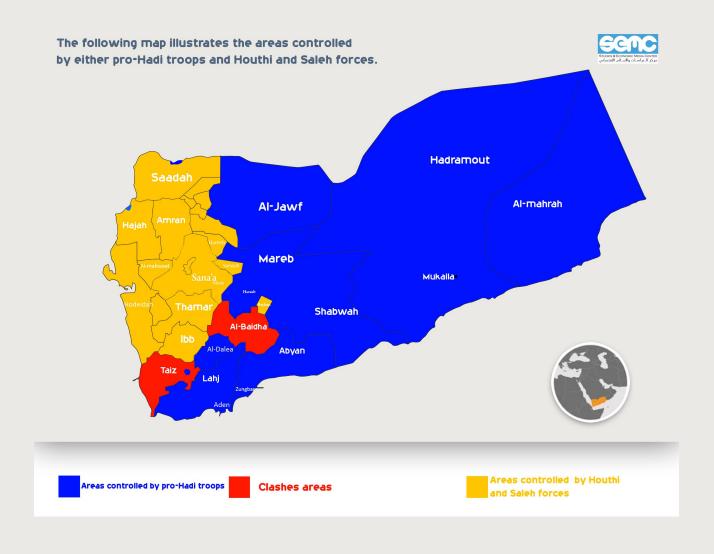
The Houthis are in full control of Ibb governorate, including its provincial capital, Ibb, while the pro-Hadi army are calling the shots in the areas of Humak and Byar on the southern province.

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Aden Region

This region includes the provinces of Aden, Lahj, Abyan and Dhalea. It has been fully recpatured from the Houthis and Saleh forces, with the exception of the city of Damat and 50% of Murais area in Dhalea.

Hadhramout region

This region includes the provinces of Hadhramout, Mahra and Shabwa, all of which are under the control of the pro-Hadi troops, except for some parts of Asilan and Baihan districts in Shabwa.

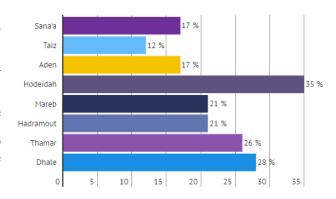
Basic commodity prices

2016 saw a rise in basic commodity prices in the target provinces-Sana'a, Taiz, Aden, Hodeida, Mareb, Hadhramout, Dhamar and Dhalea- compared to 2015. The prices of basic food itemswheat flour, sugar, rice, baby milk and cooking oil- rose in 2016 by 22% on average as opposed to last year.

Hodeida witnessed the highest such hike in basic commodity prices during 2016, which averagely stood at 35% compared to last year. There was an average price rise of 28% in Dhalea, 26% in Dhamar, 21% each in Mareb and Hadhramout, 17% each in Aden and Sana'a, and 12% in Taiz- the lowest ever in the target provinces.

This is due to the smooth movement of basic commodities through Al-Dhabab crossing point following the breaking of the embargo imposed on the western parts of the city. The drop in basic commodity prices in Taiz doesn't mean that such prices are lower in the city than other cities; rather it is owing to the fact that Taiz saw the highest price hike ever in the target provinces in 2015 because of the blockade clamped on the city by the Houthi group.

A chart illustrating the rate of the hike in basic commodity prices in target provinces in 2016



Exchange rate

2016 also saw a rise in the exchange rate of foreign currencies against the Yemeni rial. The US dollar averagely rose by 28% against the Yemeni cur-

rency in 2016 as opposed to 2015. The green buck hit an all-time high of YR 320 in 2016 compared to 250 in 2015.



Key economic challenges in 2016

In 2016, the Yemeni economy suffered several setbacks due to the economic crisis triggered by the war. These are:

Liquidty crisis

The country's banking sector experienced severe liquidity crisis from June 2016 in terms of foreign currencies and the local currency. This resulted in the government being unable to shoulder the responsibility of covering basic expenditures, such as salaries and operational costs. The crisis further rendered banks unable to meet their commitments towards customers and depositors, which further deepened customers' mistrust in the banking sector and raised the rate of faltered loans to 38% of the private sector's total loans. Again, this further worsened the liquidity crisis.

Inability to pay salary of government employees

The Houthi group which is in control of state institutions in Sana'a, including the central bank and the ministry of finance, was incapable of paying the salaries of government employees, military and civilian. it was instead obliged to pay 50% of September 2016 salaries and stopped any such payments altogether for the rest of the year.

foreign bank transfers stopped

Local banks faced many difficulties in terms of dealing with foreign banks that stopped opening any accounts for Yemeni banks, as the country was classified as high-risk zone. In addition, American banks rejected to deal with their Yemeni counterparts and even closed their accounts. Worse still, foreign banks rejected any outgoing and incoming money transfers in US dollars.

Famine hit some districts

The war further aggravated the humanitarian crisis, with some Yemeni provinces, such as Hodeida and Hajj, and districts in Ibb and Taiz, suffering from famine. Thousands of poor families couldn't make ends meet owing to the lack of income sources and the stopping of social security aid to the poor. Despite such serious challenges from which the Yemeni economy is still suffering, there has been relative improvement in its economy in 2016 compared to 2015.

Though the Center predicts a slight improvement in the performance of the Yemeni economy in 2017 as opposed to 2016

SEMC: The growth rate of gross domestic production (GDP) may be in the minus for the following reasons:

The government has started exporting oil from Masila oil fields in Hadramout and transferring other amounts of the commodity to Aden refinery.

improvement
in the transport of the
products imported through
Yemeni ports.

War effects in the liberated governorates, such as Aden, Hadramout and Mareb, were reversed. The fuel crisis
has eased off as
oil imports
have relatively
improved in
2016 compared
to 2015, with
the prices of oil
products dropping by 20% in
December 2016
as opposed to
last year.

The inflationary spiral has slumped due to the improvement seen in the security situation in some governorates, the availability of oil products, and the rising supply of imported goods.

Basic Services

Water & Electricity

Water and electricity services were totally lacking in 2016 amid reports that 24 million people or 90% of the total population have no access to public electricity, while 14 million have no access to potable water and sanitation. Nonetheless, some areas under the control of President Hadi's government witnessed an improvement in the delivery of water and power services, as has been the case in the provinces of Hadhramout, Aden and Mareb. Similarly, some Sana'a neighborhoods controlled by the Houthi group and pro-Saleh troops have seen electricity coming back for about two months in 2016 before it was cut off again. Other provinces have been suffering from total power outage since the outbreak of the war in March 2015.

Many Yemeni families heavily depend on alternative energy, such as solar energy, for power. A 100 watt solar panel costs almost \$1,000. Only few families rely on privately-owned generators for few hours of power. Eight hours a day of generator power averagely costs \$150 per month.

Education

The education sector has deteriorated in 2016 due to the war that has been raging on in Yemen for almost two years. According to reports, more than 1,600 schools have been partially or entirely damaged, meaning that they cannot be used for teaching anymore. Further, one out of ten functioning schools is shut down, while nearly 200 schools were turned into military barracks and 150 schools were used as shelters for the displaced.

The war has resulted in almost 2 million students, males and females, getting no access due to harsh economic conditions that rendered parents unable to provide their children with school materials, in addition to displacement. The number of internally displaced people came to 3 million, including 300,000 children, meaning that those children are denied access to education.

The non-payment of the salaries of Yemeni teachers and Yemeni university teaching staff has further aggravated the problems of the country's education system. Yemeni students abroad are facing many difficulties as they were not paid their financial subsidies owing to the power struggle between President Hadi's internationally recog-

nized government and the Houthi group that controls the capital city of Sana'a and other provinces.

<u>Yemen's education system is grappling</u> with many challenges, including:



Education spending is low compared to public spending.



Many educational institutions were damaged because of the war, while some others were used as either military barracks or shelters for the displaced.



lack of textbooks.



School dropouts due to the difficult economic conditions Yemeni citizens are still experiencing.



Many organizations have stopped support to education programs.

Health situation

Yemen's health sector has extremely deteriorated since the eruption of civil war almost a couple of years ago. The World Health Organization (WHO) has warned against the deterioration of the country's health system.

Reports indicate that 50% of Yemen's health facilities are currently out of work, 14% are functioning properly. Health problems in Yemen have cast a shadow on the lives of Yemenis, particularly women, children and the elderly. Besides, a number of provinces are experiencing great deterioration in the health sector as the government and local authorities are not able to counter the challenges facing the health sector and/or find effective solutions health problems facing such governorates, especially those that either witness armed confrontations or still under siege such as the city of Taiz.

Moreover, Yemen has seen new outbreaks of lots of diseases and epidemics, mainly cholera. Recent reports indicate that there have been some 122 confirmed cholera cases in Yemen, 100 confirmed deaths, and 72 suspected deaths. Until November 29,2016, some 7,700 suspected cholera cases were reported in 15 provinces at risk of experiencing cholera outbreaks. Some 15 million people have no access to adequate healthcare, according to the reports.

Still, the country suffers the prevalence of other diseases such cancer, diabetes, renal failure, cardiac diseases, dengue fever, and severe acute diarrhea, among others. Malnutrition was largely rampant in Yemen, with UNICEF warning that malnourishment among Yemeni children has hit an all-time high. An estimated 2,2 million children are malnourished and in dire need of urgent care, while 462,000 others suffer from severe acute nutrition, an increase of about 200% in 2016 compared to 2014. In addition, 1,7 million Yemeni children suffer from moderately acute malnutrition.

The health systems suffers from many problems as follows:

- Many health facilities were either damaged or went out of business.
- shortage in medicines and medical appliances, mainly those necessary for treating cancer, diabetes, kidney failure and cardiac diseases.
- Health facilities are short of qualified health cadres.

The Humanitarian situation

The year 2016 has witnessed sustained deterioration of the humanitarian situation in Yemen due to the ongoing fighting, the political impasse and cessation of hostilities coupled with the breakdown of the UN-brokered peace talks. Several international organization have warned of the gravity of the humanitarian situation in Yemen. For instance, the Norwegian Council warned that the number of Yemenis who would suffer from famine in 2017 may reach 16 million out of 26 million. Further, 4,5 million people are homeless, with the number of people in need of humanitarian assistance estimated at 18,8 million. Also, 10,3 million people are in dire need of urgent assistance in order to survive.

An estimated 14,4 million people are food insecure, while 7 million others are extremely food insecure, and 4,5 million are experiencing malnutrition. Moreover, UNICEF warned that malnutrition among Yemeni children has hit an all-time level, with 2,2 million children suffering from severe malnutrition and are in need of urgent medicare. Worse still, 462,000 kids suffer from severe acute malnutrition, a high rise of 200% compared to 2014. Also, 1,7 million children suffer from moderately acute malnutrition.

Moreover, 2016 has seen humanitarian aid denied to the war-shattered areas, including the city of Taiz which has been besieged by the Houthis for about one and a half years. The Houthi militia prevent the entry of aid convoys into the city, and even confiscate and

sell it on the black market. in reaction to the measure, Minister of Local Administration in President Hadi's government, Abdul Raqeeb Saif Fatah, demanded the United Nations to shoulder its responsibility towards Taiz residents who have been under siege for over one and a half years, and to save the lives of more than 300 people suffering from kidney failure, 5000 cancer patients and 5000 diabetics.

SEMC has already revealed that the Houthis were selling aid supplies offered by aid groups on the black market at a time when famine was hitting several areas in the country.

Many experts charge that international aid groups are not clear about the distribution of aid supplies, as they use funds offered by countries to cover their operating expenses. It is estimated that the UN and other international organization received \$ one billion in aid, while the number of beneficiaries reported by those organizations doesn't exceed 5 million, which is small in comparison to the volume of funds they received. Observers revealed that 60% of such funds end up as operating expenditures, and travel allowances for these organizations, adding that what little aid that gets to the country is delivered to the Houthi group that controls the work of such outfits in such a way that makes the delivery of aid restricted to the Houthi-held areas.

Other observers opine that aid groups are cashing in on the humanitarian situation in Yemen, and never care about the suffering of citizens.

Figures and facts on the humanitarian situation in Yemen

122 confirmed cholera cases, 10 confirmed deaths, and 72 suspected deaths. Also, 7,700 suspected cholera cases were reported until November 29, 2016 in 15 provinces which are vulnerable to cholera.

- 10,3 Million are in dire need of urgent assistance in order to survive.
- 14 Million suffer from food insecurity
- 15 million have no access to adequate healthcare
- 4,5 Million suffer from malnutrition
- 14 Million have no access to drinking water and sanitations
- 7.6 live in areas threatened with cholera
- 1, 25 Million government employees waiting for their salaries. They support 6.9 million, including 3.3 children.
- 1,5 million are poor and have been waiting for social security subsidies since 2015.
- 1600 schools were damaged by war, and are out of work.
- 122 confirmed cholera cases, 10 confirmed deaths, and 72 suspected deaths. Also, 7,700 suspected cholera cases were reported until November 29, 2016 in 15 provinces which are vulnerable to cholera.
- 24,3 million (nearly 90% of the total population) have o access to public electricity.
- 950million dollars : the total funds received by the aid groups operating in

Port traffic

Monthly food imports in November 2016

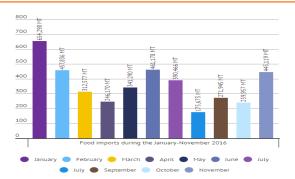
The volume of Yemen's food imports has doubled in November 2016, totaling 445, 119 tons, including commercial and humanitarian imports. Some 15 ships, laden with food items, berthed at Yemeni ports in Novem-

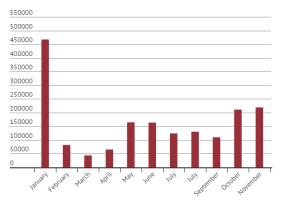
Fuel imports in November 2016

The volume of fuel imports in November, 2016 rose to 219,522 tons as opposed to 211,188 tons in October, and 109, 764 tons September, an increase of 4% and 100% respectively. Despite the increase in the volume of fuel imports in November, they only cover 40% of the country's monthly needs estimated at 544,000 tons.

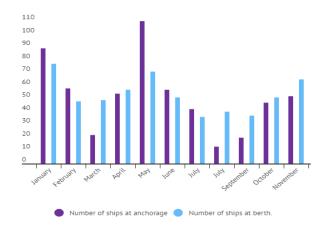
Vessels anchored at Yemeni ports in 2016

The number of ships anchored at Yemeni ports in November, 2016 rose to 65 compared to 51 in October.





status of the vessels at ports per month during 2016.





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