



YEMEN

GAPS AND NEEDS ANALYSIS (GNA)

ASSESSMENT AND RECOMMENDATIONS REPORT

NOVEMBER 2024



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EXECUTIVE SUMMARY

Contextual Information

Following nearly a decade of conflict, Yemen faces critical humanitarian needs. While humanitarian organizations have provided substantial support, the situation remains severe, with an estimated 18.2 million people requiring assistance in 2024. Despite the increase in humanitarian needs, funding for humanitarian efforts in Yemen has sharply declined since 2021. This has created significant challenges and led to only 11.2 million people being targeted in accordance with the [Yemen Humanitarian Plan 2024](#). With a necessary budget of USD 2.7 billion, of which only [46% has been secured as of October 23, 2024](#).

Since its official activation in 2010, the Yemen Logistics Cluster, led by the World Food Programme (WFP), has been committed to facilitating logistical support for humanitarian partners by addressing logistical gaps and challenges. This has included the lead and coordination of the logistics response, the analysis and compilation of key logistics information through information management activities and, when needed, the facilitation of access to common logistics services. In addition to this, the Yemen Logistics Cluster has also supported the humanitarian community in Yemen through capacity building and advocacy activities, when needed.

In September and October 2024, the Yemen Logistics Cluster, with the support of the Logistics Cluster Team in Rome, carried out a [Gaps and Needs Analysis \(GNA\)](#), [a standard tool for assessing and understanding humanitarian logistics gaps and needs in a field-based operation](#). Stakeholders and partners were briefed on the objectives and stages of this assessment in advance, followed with a structured survey that was circulated to all Logistics Cluster partners involved in the Yemen response. Responses were collected from 41 partners, complemented by bilateral interviews with 14 key partners to gather additional insights on the status of logistics coordination, information management, capacity building, logistics infrastructure and services and advocacy.

Identified Gaps

Coordination

A gap in coordination with the authorities and within the humanitarian community has been identified throughout the exercise.

Improved coordination is also needed in last-mile and hard-to-reach areas.

Information Management

One of the main gaps identified in information management is the availability of GIS mapping and information regarding access.

Information regarding local supplier capacity and market trends has been identified as the need for a platform for partners to exchange this information.

Capacity Building	There is a lack of access to technical training for humanitarian logistics personnel, due to a lack of offer as well as limited availability of funds to access trainings abroad. This situation is more acute in rural or small populated areas.
Logistics Infrastructure/ Services	<p>Sea Transport</p> <p>36% of partners reported challenges with sea transport to Yemeni ports, with an overall rating of 2.7/5 for sea transport infrastructure. Partners cited limited shipping options, significant delays in shipping lead times (which have extended to up to five months in 2024), and increased war risk premiums, which have added substantially to operational costs.</p> <p>Despite these challenges, commercial sea transport services remain available in the region, and the WFP Interagency Department provides sea transport to Yemeni ports on a cost-recovery basis through its Bilateral Services Provision Unit (On Demand Services).</p> <p>Storage Services</p> <p>26% of partners noted a lack of warehousing and backup storage facilities, particularly in the southern region (with reported needs over 4,000 m²) and the northern region (over 1,000 m² need reported). There is also, according to partners, limited warehouse capacity in remote areas due to ongoing underfunding situation.</p> <p>All partners utilizing the Logistics Cluster’s Mobile Storage Unit (MSU) loaning services confirmed their need to extend these agreements for the next year.</p>
Custom Procedures and regulations	<p>Respondents managing international procurement reported significant delays in customs clearances for critical humanitarian products, including pharmaceuticals and cold chain items, as well as operational assets such as telecommunication equipment and armored vehicles.</p> <p>Unclear governmental regulations for importing various types of aid pose challenges for partners, leading to delays and potential issues with the shelf life of essential supplies.</p> <p>The customs clearance process was rated at 2.8/5, underscoring a need for improved coordination mechanisms between local authorities and partners. Enhanced capacity-building initiatives coordinated with authorities in both the northern and southern regions would bolster the logistics expertise of humanitarian organizations operating in Yemen.</p>

Key Recommendations

Proposed Activities	<ul style="list-style-type: none"> • The Logistics Cluster to continue coordinating with local authorities to streamline customs procedures, clarify import regulations, and maintain communication among humanitarian stakeholders. Monthly teleconferences should continue, with in-person meetings resuming quarterly or semi-annually in both northern and southern regions. • Information shared by the Logistics Cluster—both in coordination meetings and through platforms such as the mailing list and website—supports strategic planning and aids understanding of Yemen’s complex operational environment. This has been informed by partners. Thus, it is recommended to maintain platforms for logistics information sharing and coordination.
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- To further improve operational effectiveness, it is recommended that the Cluster develop more intuitive GIS mapping platforms and introduce new information management products that provide up-to-date logistics capacity data and local supplier information. Information-sharing collaboration to strengthen partners' planning capacity and enhance situational awareness and planning.
- The Logistics Cluster should continue to support partner capacity-building efforts, prioritizing and delivering key training topics for the upcoming year.
- Based on discussions with partners currently using the MSU loaning service, it was confirmed that loaded assets support essential storage operations in remote areas. All partners using this service have requested an extension of their loan agreements for another year. Maintaining the Cluster's Mobile Storage Units (MSU) and Temperature-Controlled Units (TCU) loaning services is therefore recommended.

PERCEIVED NEEDS AND VERIFIED GAPS

Coordination

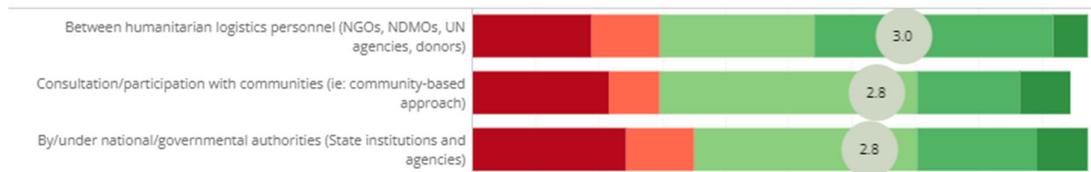
Perceived Needs	46% percent of partners identified a lack of coordination, particularly with local authorities and in community engagement. They also identified a need for improved coordination in last-mile and hard-to-reach areas.
Identified Gaps	Following analysis, there is a need for coordination mechanisms to continue between the humanitarian organizations and government authorities as well as within humanitarian partners.

Chart 1. GNA – Coordination Findings:

Rate the reliability / strength of existing coordination mechanisms in the current operating context

(1=lowest, 5=highest)

Number of partners by rating score (the average of the responses is displayed in the circle)



Information Management

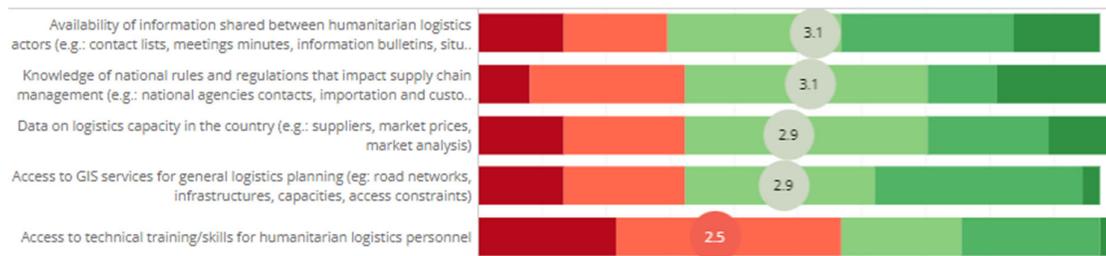
Perceived Needs	The GIS mapping capacity was rated at 2.9/5, and access to logistics capacity data averaged 2.9/5. Partners emphasized the need for additional products related to local supplier capacity and market trends.
Identified Gaps	Although the Logistics Cluster publishes access constraint maps monthly on its website and distributes information products via its mailing list, there are identified gaps in real-time information updates, particularly for access constraints and supplier data.

Chart 2. GNA – Information Management Findings:

Rate commonly available data and information about Logistics in the current operating context

(1=lowest, 5=highest)

Number of partners by rating score (the average of the responses is displayed in the circle)



Capacity Building / Training

Perceived Needs	76% of Partners are facing gaps in access to technical training/skills at an average of 2.5/5.
Identified Gaps	After verifying the capacity building needs, challenges have been identified in sourcing qualified logistics expertise, particularly in rural areas. Some organizations cannot feasibly conduct overseas trainings due to fund constraints. Following the analysis, temperature-controlled logistics management, customs regulations, fleet management, procurement management, GIS, and warehouse management are the key areas identified for skills development.

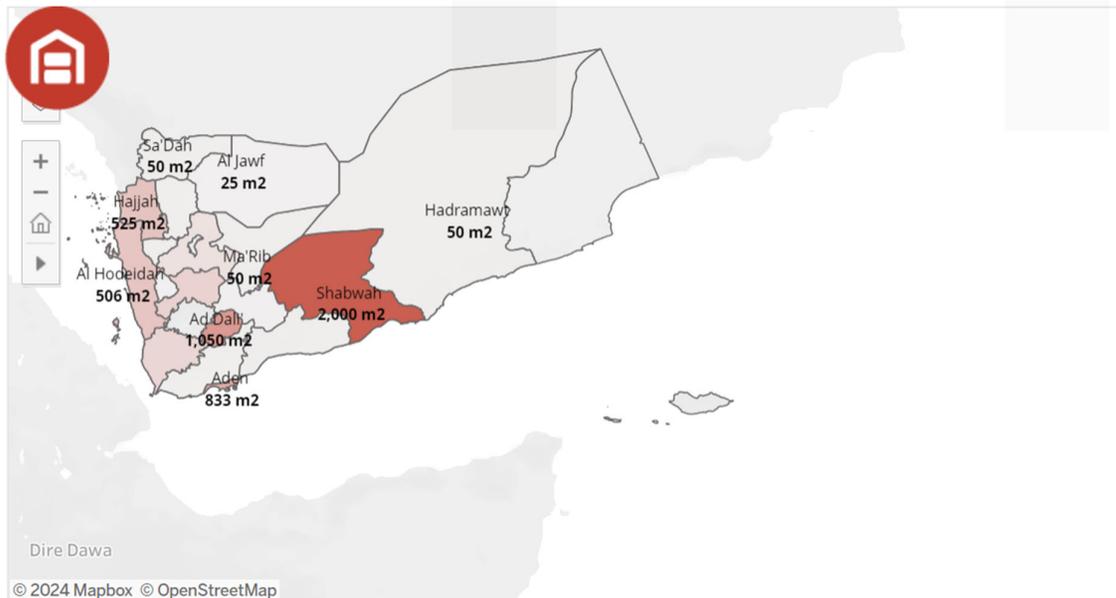
Logistics Infrastructure/ Services

Storage:

Perceived Needs	26% of respondents cited a lack of warehouse capacity and challenges in securing storage in remote areas, with reported needs over 4,000 m ² in the southern part of the country and over 1,100 m ² in the northern part.
Identified Gaps	Following assessments of the storage needs, all the storage service needs reported by partners are tied to funding limitations. The Logistics Cluster has been supporting partners' storage capacity by facilitating access to Mobile Storage Units (MSUs) and Temperature-Controlled Units (TCUs) at no cost to the users.

Chart 3. Storage Needs by Region:

Storage needs reported by region (in m²)



Customs Procedures and regulations

Perceived Needs	Improving collaboration between the government and humanitarian organizations, particularly on customs processes is highly needed. Enhanced engagement from both sectors is crucial to resolving logistics and supply chain issues is another perceived need as well. Partners emphasized the need for increased clarity around governmental regulations and the facilitation of pre-import and customs procedures highly required, particularly for medical supplies, cold chain items, and telecommunications equipment.
Identified Gaps	The lack of clear governmental regulations for aid imports has been identified as a major challenge, often causing delays, thus shortening the shelf life of humanitarian goods.

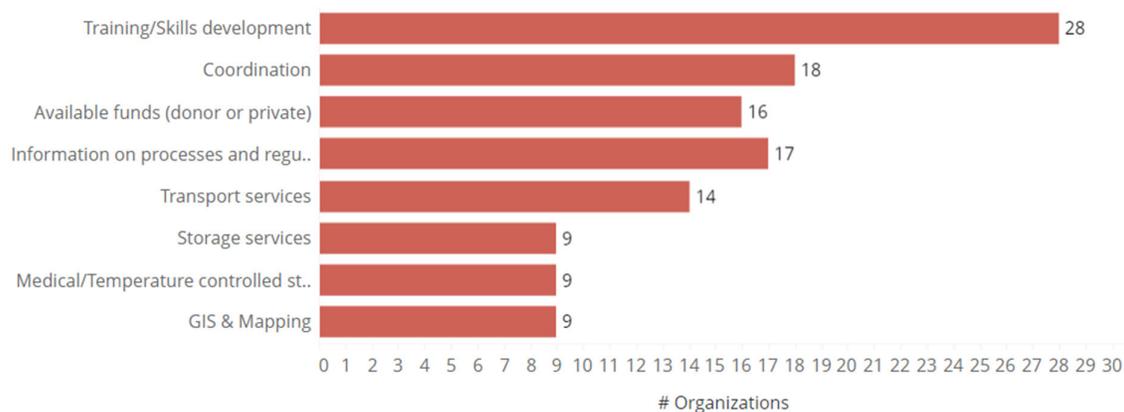
CONCLUSION AND RECOMMENDATIONS

Overall Conclusions and Observations

The Gaps and Needs Analysis 2024 exercise illustrates significant logistical relevant gaps and bottlenecks in the following sectors of the supply chains in country:

Needs	No. of partners	Percentage
Training/Skills development	29	69.1 %
Coordination	19	45.2 %
Information on processes and regulations	18	43 %
Available funds (donor or private)	16	38.1 %
Transport services	15	35.7 %
GIS & Mapping	9	21.4 %
Storage services	9	21.4 %
Medical/Temperature controlled storage and transport services	9	21.4 %

Number of partners that identified the different items as a gap



A lack of coordination, particularly with local authorities and among humanitarian organizations, has resulted in delays and inefficiencies, with partners rating coordination efforts at 2.8 out of 5. Recommendations include regular coordination meetings, both virtual and in-person, to improve transparency and unify operational strategies across regions.

Access to comprehensive, real-time information remains limited, with a GIS mapping capacity rated at 2.9 out of 5 and logistics data availability rated at 3.1 out of 5. Partners emphasized the need for robust, accessible platforms to enhance situational awareness and planning. Improved GIS mapping and data-sharing initiatives are essential for better resource allocation and coordination among stakeholders. The Logistics Cluster's development of new information management products, including updates on logistics capacities and local supplier availability, is a positive step toward closing these gaps.

Approximately 76% of partners highlighted gaps in technical skills for logistics personnel, especially in rural areas. Critical areas requiring training include temperature-sensitive logistics, customs processes, fleet management, and procurement. Expanding local training opportunities could alleviate challenges faced by

organizations unable to send staff abroad for skill development. These capacity-building efforts are critical to empowering local actors, thereby fostering more resilient logistical support.

Logistical infrastructure, particularly sea and storage facilities, remains strained. A 36% rating highlights the limited availability and reliability of sea transport to Yemeni ports, which is exacerbated by high operational costs and shipping delays of up to five months.

The GNA, combined with previous road transport assessment conducted by the Logistics Cluster did not outline critical gaps in this area. Overland transport costs and availability from international routes has not been affected despite the ongoing crisis in the region. Inland transportation remains as well accessible, with the only being the dual customs procedures.

While partners have reported warehousing facility's needs, funding has been identified as the main constraint, rather than the availability of storage infrastructure. Maintaining and expanding Logistics Cluster's asset loaning services, including Mobile Storage Units (MSU) and Temperature Control Unit (TCU), is necessary to support partners experiencing storage shortages.

Uncertainty and duplication of customs and importation regulations, together with high war-risk premiums delay the import of essential humanitarian goods. Strengthening advocacy efforts to streamline customs procedures and increase collaboration with local authorities is critical for addressing these regulatory bottlenecks. By fostering governmental and humanitarian collaboration, these logistical obstacles can be reduced, paving the way for a more agile response framework.

Proposed Activities

- The Logistics Cluster will continue to hold online coordination meetings on a monthly basis and will organize dedicated in-person meetings in both Sana'a and Aden, gathering all stakeholders on semi-annual basis.
- The Logistics Cluster will maintain the Mobile Storage Units (MSU) and Temperature-Controlled Units (TCU) loaning services.
- Continue sharing information on access in Yemen using mapping tools and enhance this activity by launching and activating the Yemen page on the [LogIE \(Logistics Information Exchange\) GIS Maps platform](#), disseminating it through the Yemen Logistics Cluster webpage, training partners in its use, and maintaining regular updates. This will enhance information-sharing and strengthen partners' planning capacity.
- Development of an additional information management product focused on local supplier capacity to be shared with partners on a quarterly basis.¹
- The Logistics Cluster will continue working with local authorities to clarify customs procedures and import regulations and facilitate communication with the humanitarian community.
- The Logistics Cluster will provide a platform for the organization of training activities leveraging the logistics skills of humanitarian organizations in the country.

¹ The inclusion of company information in the supplier list will not imply a business relationship between the supplier and WFP / the Logistics Cluster and will be used solely for information purposes. WFP / the Logistics Cluster will maintain complete impartiality in this exercise, as it is not in a position to endorse, or comment on any company's suitability as a reputable service provider.

Final Recommendations

In light of the gaps and bottlenecks identified during the Gaps and Needs Analysis, it is evident that logistics gaps persist in the country. The support provided by the Yemen Logistics Cluster remains crucial for enabling the humanitarian response and requires expansion in the previously mentioned areas. It is recommended to maintain the Yemen Logistics Cluster activated.

Should the Logistics Cluster remain active

Yes

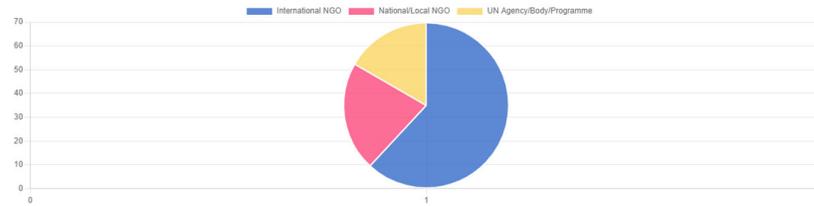
A joint review by the Inter-Cluster Coordination Group (ICCG), Humanitarian Coordinator (HC), and Humanitarian Country Team (HCT) will commence in six months to determine the next steps and consider a potential transition strategy to a Logistics Sector or Logistics Working Group, if appropriate.

ANNEXES

ANNEX 1. CLASSIFICATION, PROJECTS, AND LOGISTIC CAPACITY OF ORGANIZATIONS THAT PARTICIPATED IN THE GAPS AND NEEDS ANALYSIS EXERCISE 2024

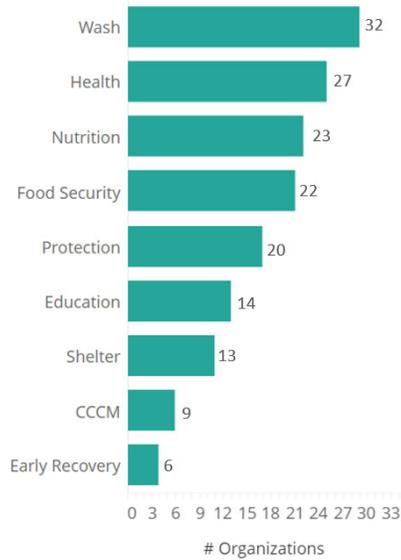
1. Humanitarian Org. Classification

Value	Frequency	Percentage
International NGO	26	61.9
National/Local NGO	9	21.43
UN Agency/Body/Programme	7	16.67



2. Sectoral interventions

Number of organizations working in each of the humanitarian sectors



3. Logistics Capacity

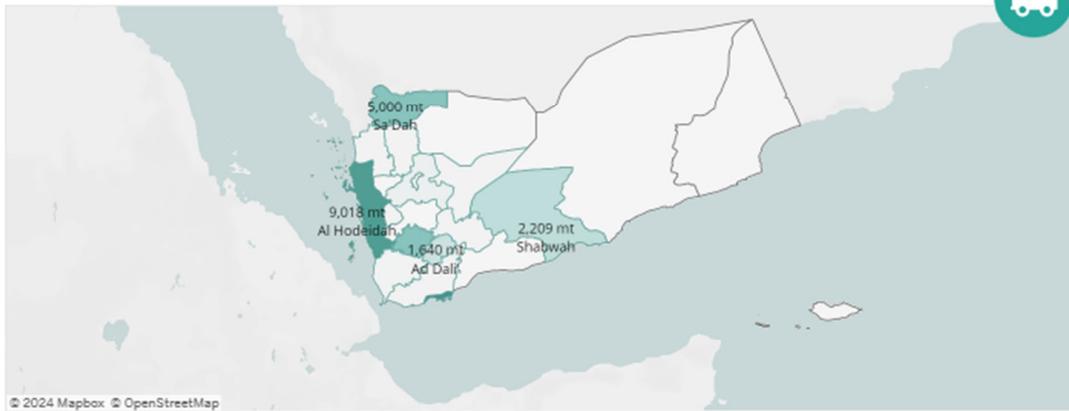
Storage capacity by region

Total capacity reported by partners by region (in m²)

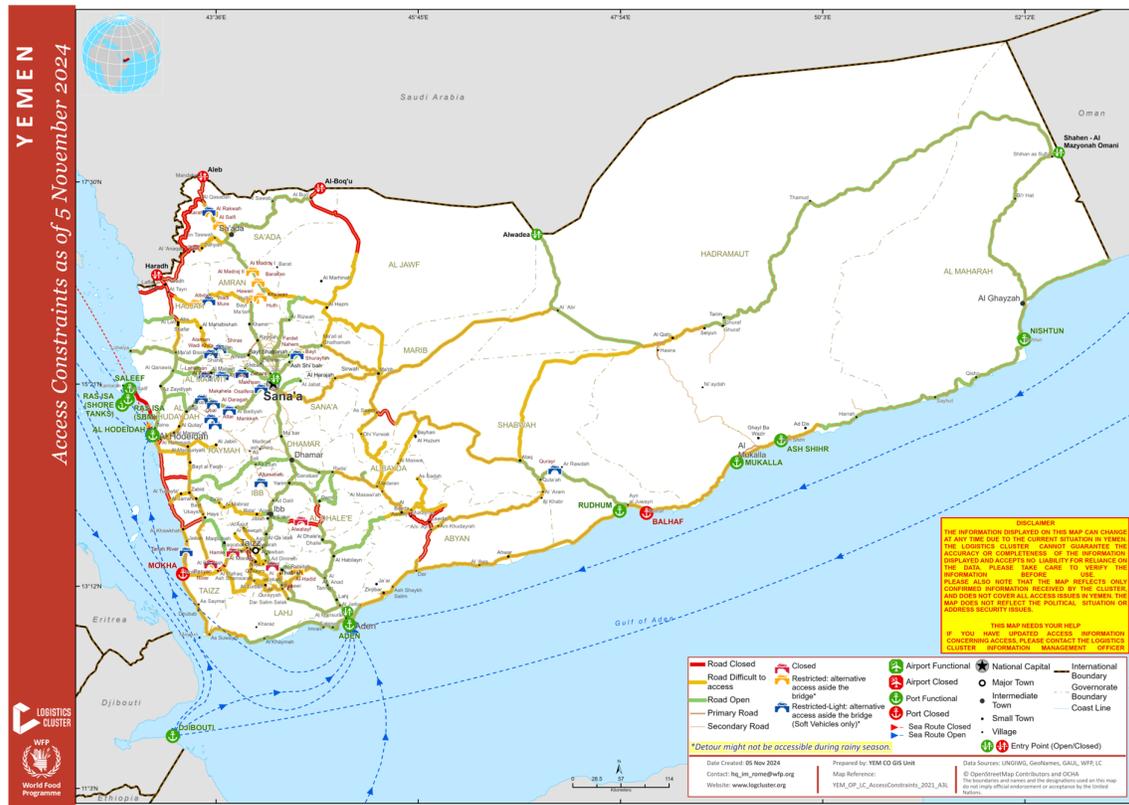


Transport capacity by region

Total capacity reported by partners by region (in mT)



ANNEX 2. YEMEN LOGISTICS CLUSTER ACCESS CONSTRAINS MAP: NOVEMBER 5, 2024



ANNEX 3. LIST OF HUMANITARIAN ORGANIZATIONS THAT PARTICIPATED IN THE YEMEN GAPS AND NEEDS ANALYSIS 2024

No.	Org. Name
1	ACTED
2	Action Contre La Faim (ACF)
3	Action For Humanity Int.
4	ADRA
5	Benevolence Coalition for Humanitarian Relief (BCHR)
6	Building Foundation for Development (BFD)
7	Care
8	Danish Red Cross
9	Danish Refugee Council (DRC)
10	FHI360
11	Field Medical Foundation
12	Food and Agriculture Organization (FAO)
13	German Red Cross
14	Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ)
15	International Committee of the Red Cross (ICRC)
16	International Medical Corps (IMC)
17	International Organization for Migration (IOM)
18	International Rescue Committee (IRC)
19	Islamic Relief
20	Medair
21	Médecins du Monde France (MdM)
22	Médecins Sans Frontières Holland (MSF)
23	Médecins Sans Frontières Spain (MSF)
24	MedGlobal
25	NAHR
26	Nidaa Foundation for Development and Advancement
27	Norwegian People's Aid
28	People in Need (PiN)
29	Première Urgence Internationale (PUI)
30	Samaritan's Purse
31	Save the Children International (SCI)
32	Secours Islamique France (SIF)
33	Society for Humanitarian Solidarity (SHS)
34	Sustainable Development Foundation
35	United Nations Children's Fund (UNICEF)
36	United Nations High Commissioner for Refugees (UNHCR)
37	United Nations Population Fund (UNFPA)
38	United Nations Office for Project Services (UNOPS)
39	World Food Programme (WFP)
40	Yemen Karam Organization (YEKO)
41	ZOA

REFERENCES & RELEVANT DOCUMENTS/APPLICATIONS:

- [Yemen Logistics Cluster Website](#)
- [Yemen Humanitarian Plan 2024](#)
- [YHRP 2024 - Funding Status, 23 October 2024 \[EN/AR\] | ReliefWeb](#)
- [UN Office for the Coordination of Humanitarian Affairs](#)
- [Yemen - Access Constraints Map, 5 November 2024](#)