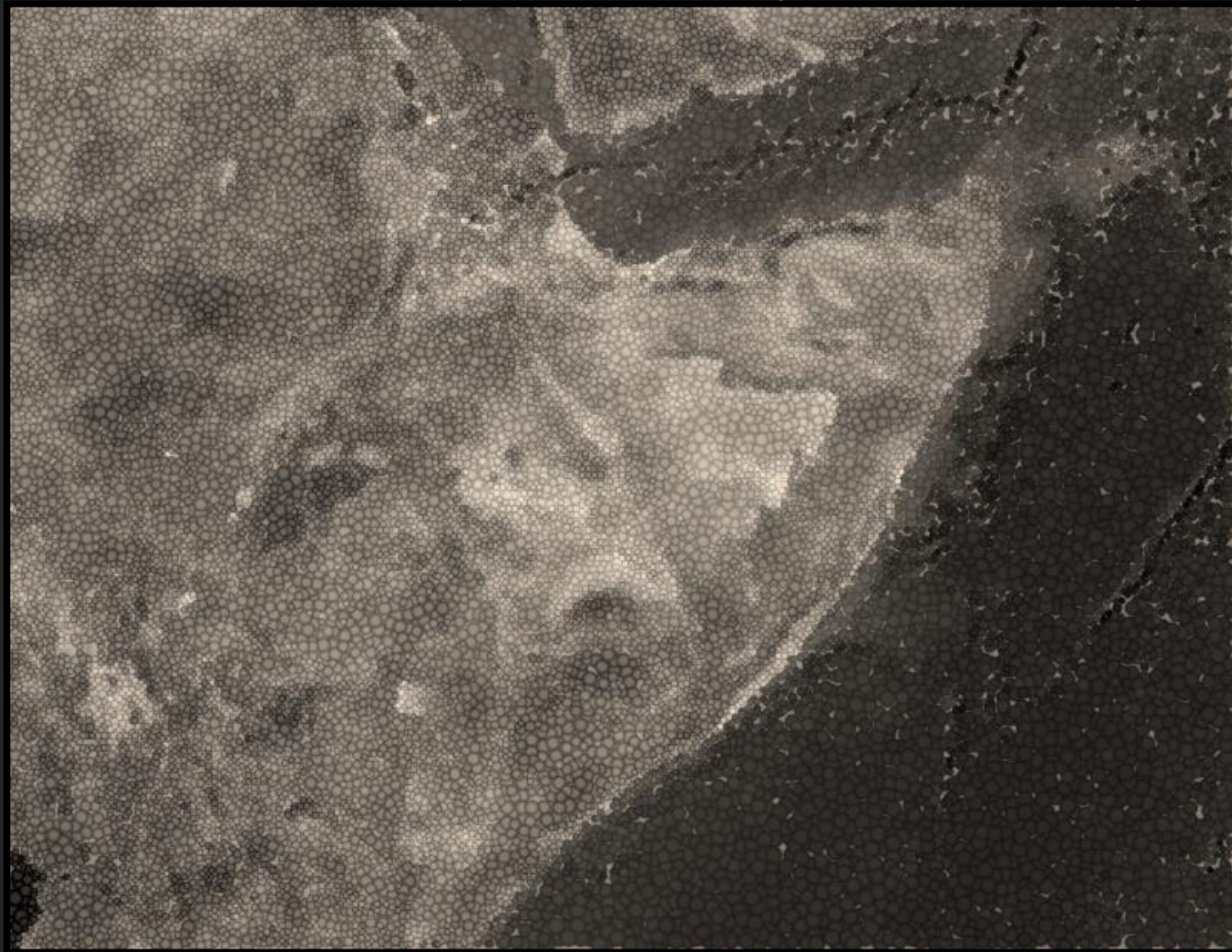


# A SPATIAL ANALYSIS OF MARKET SYSTEMS

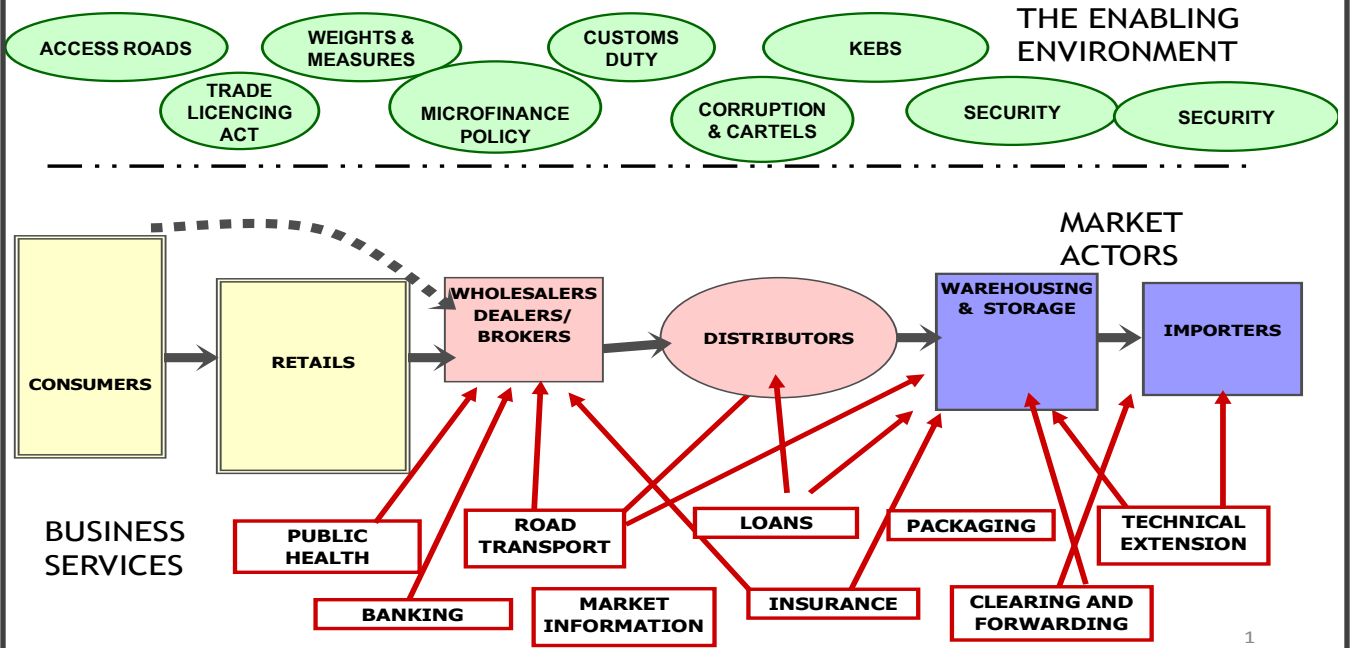
in south central Somalia, north-eastern Kenya and southern Ethiopia



The International Labour Organisation Somalia Programme

14<sup>th</sup> March 2012

# Imported goods market system: NORMAL PERIOD



# Imported goods market system: EMERGENCY PERIOD

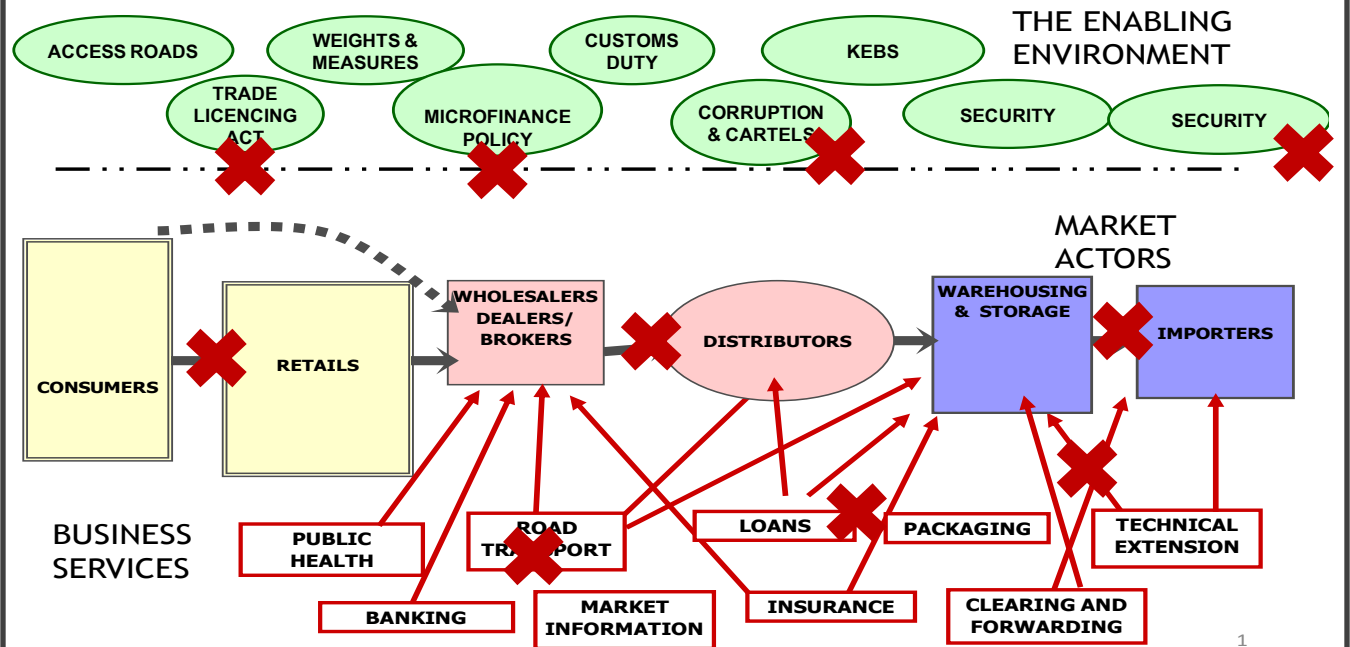
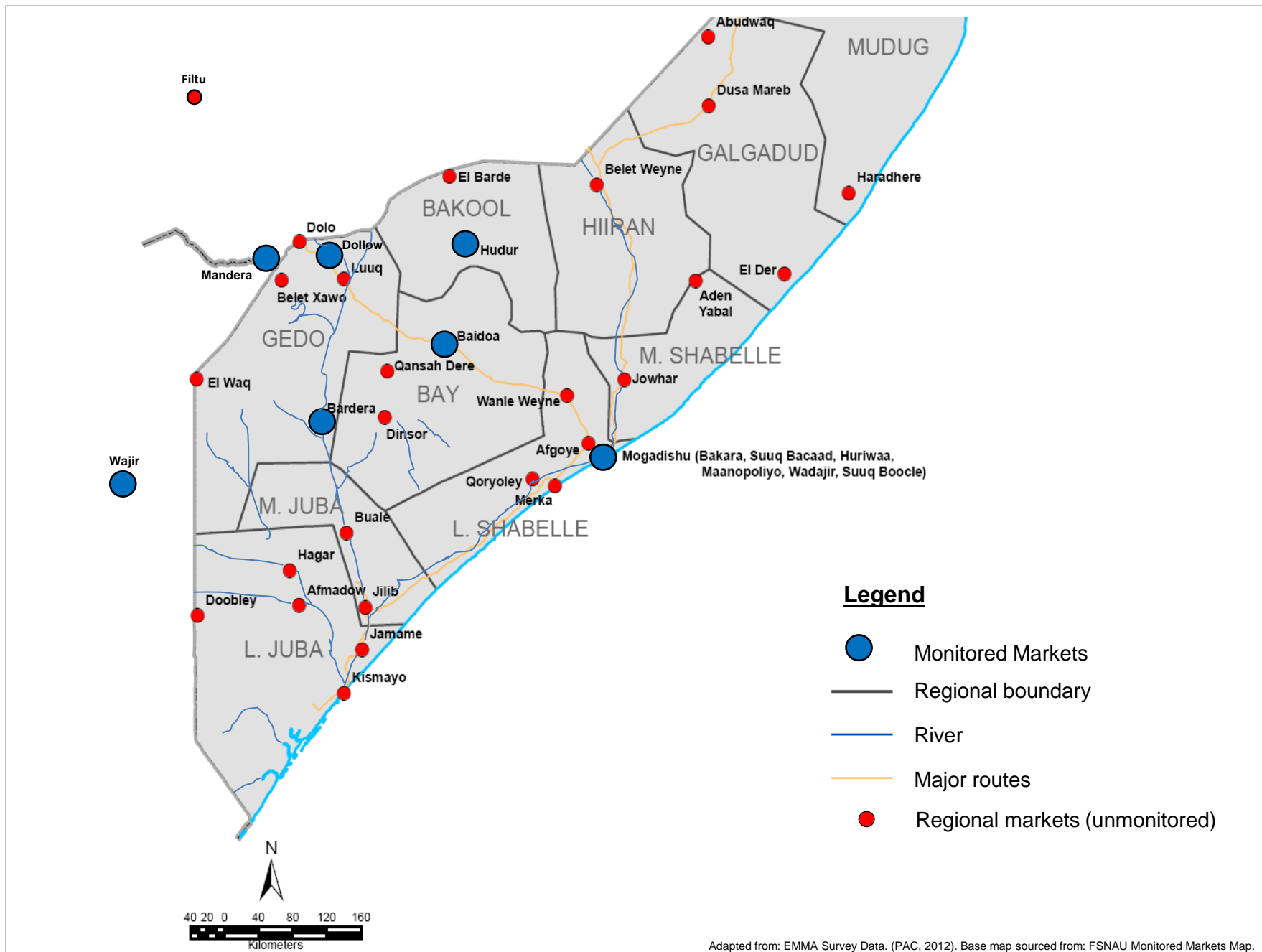


Figure 1

# Monitored Markets (EMMA)

(Sept 2011)



Adapted from: EMMA Survey Data. (PAC, 2012). Base map sourced from: FSNAU Monitored Markets Map.

Figure 2

# Markets Where Items Sold (core commodities)

(Sept 2011)

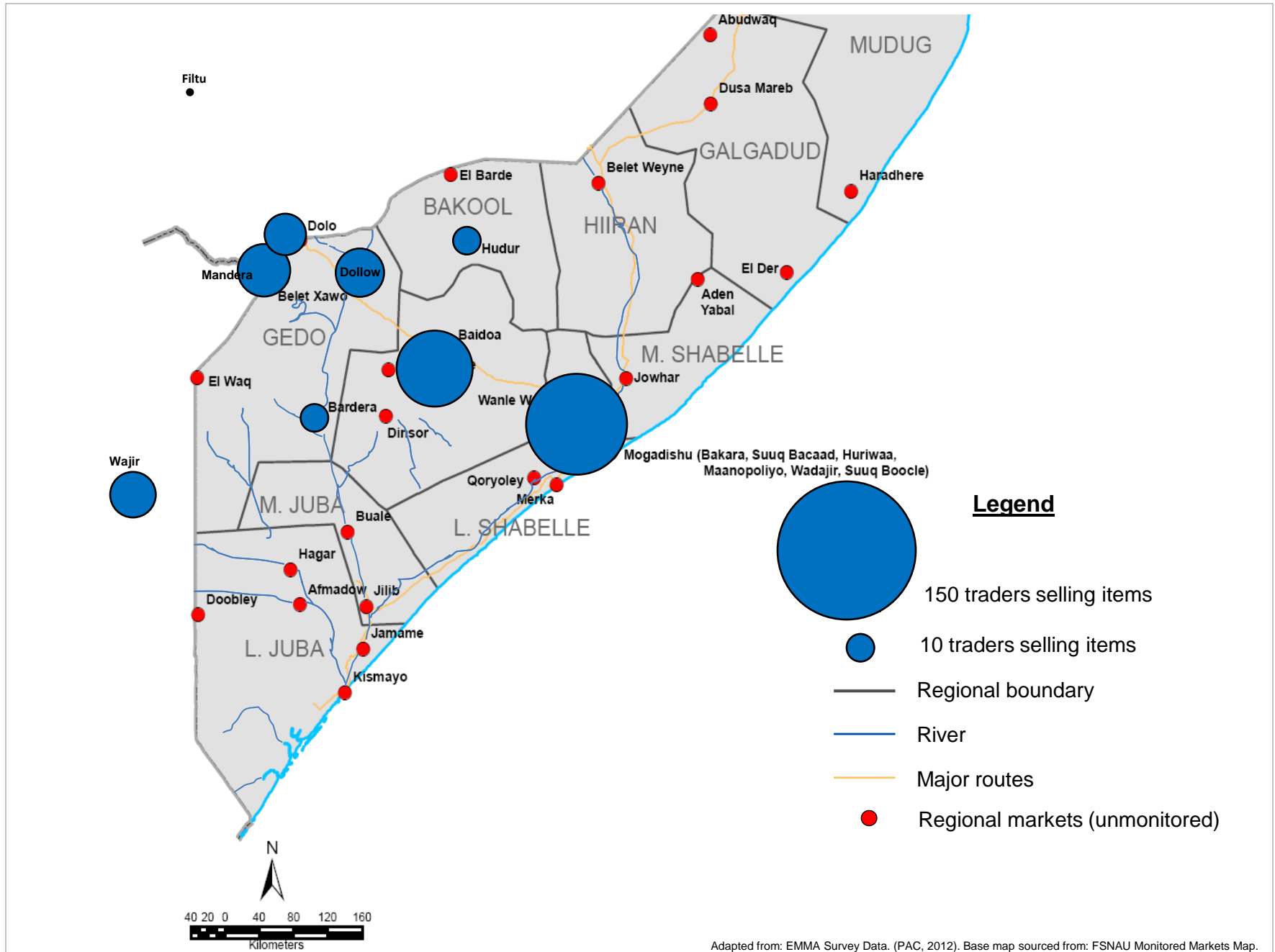
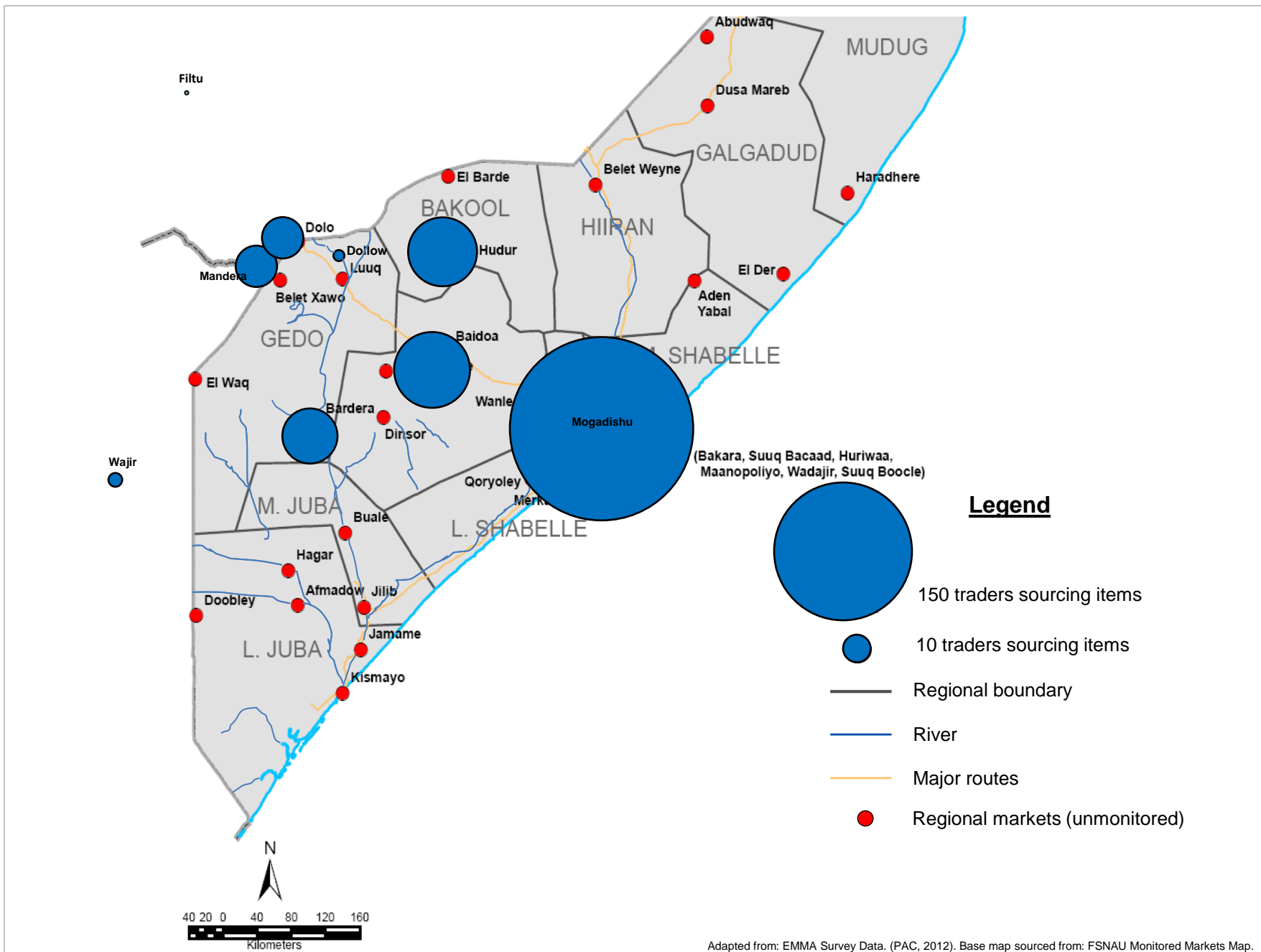


Figure 3

# Markets Where Items Sourced (core commodities)

(Sept 2011)



Adapted from: EMMA Survey Data. (PAC, 2012). Base map sourced from: FSNAU Monitored Markets Map.

Figure 2

Markets Where Items Sold (core commodities)

(Sept 2011)

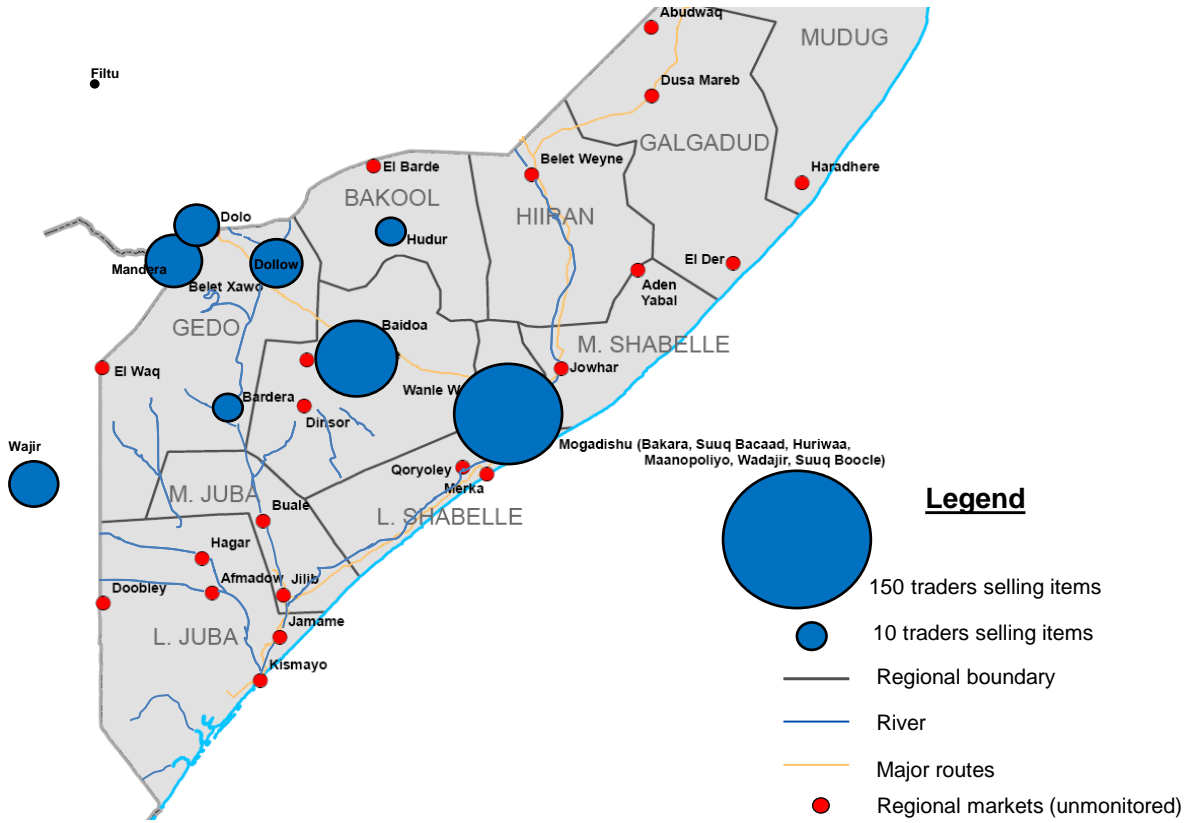


Figure 3

Markets Where Items Sourced (core commodities)

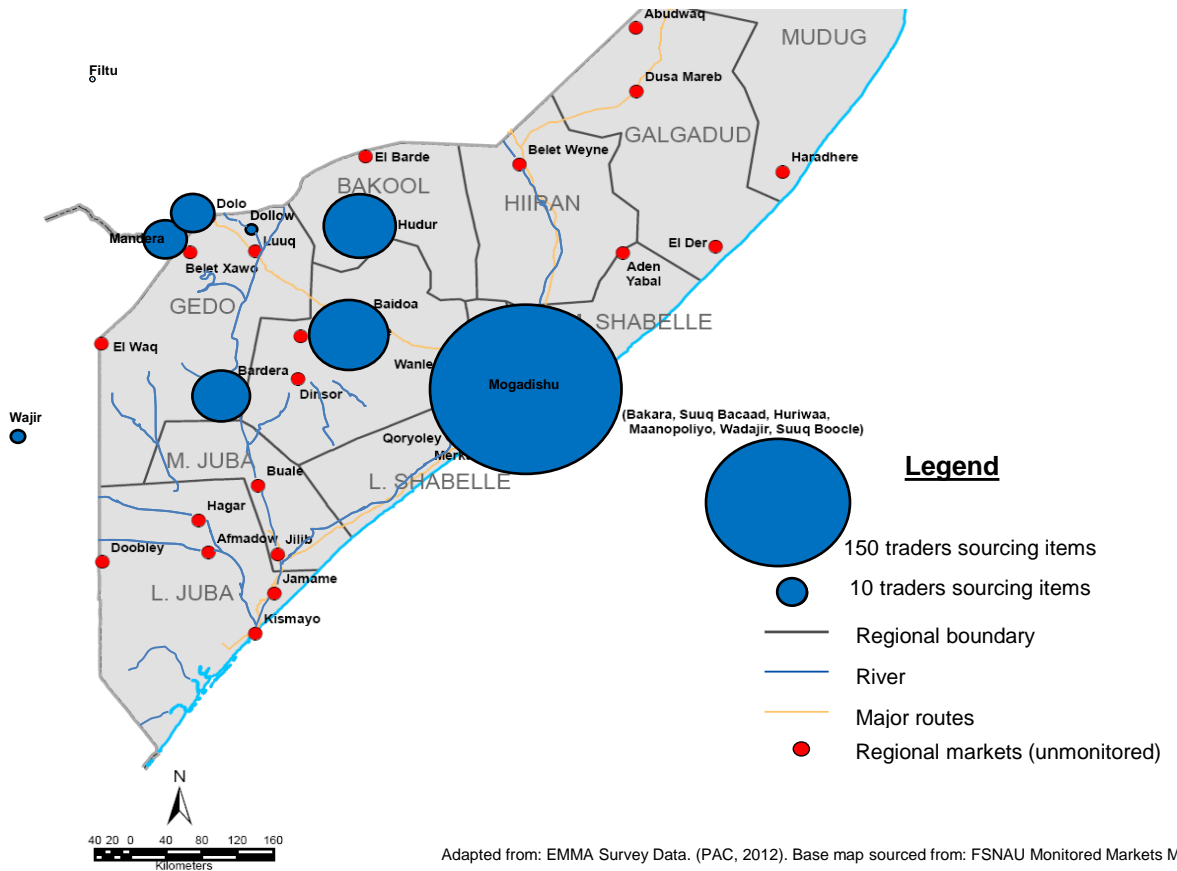
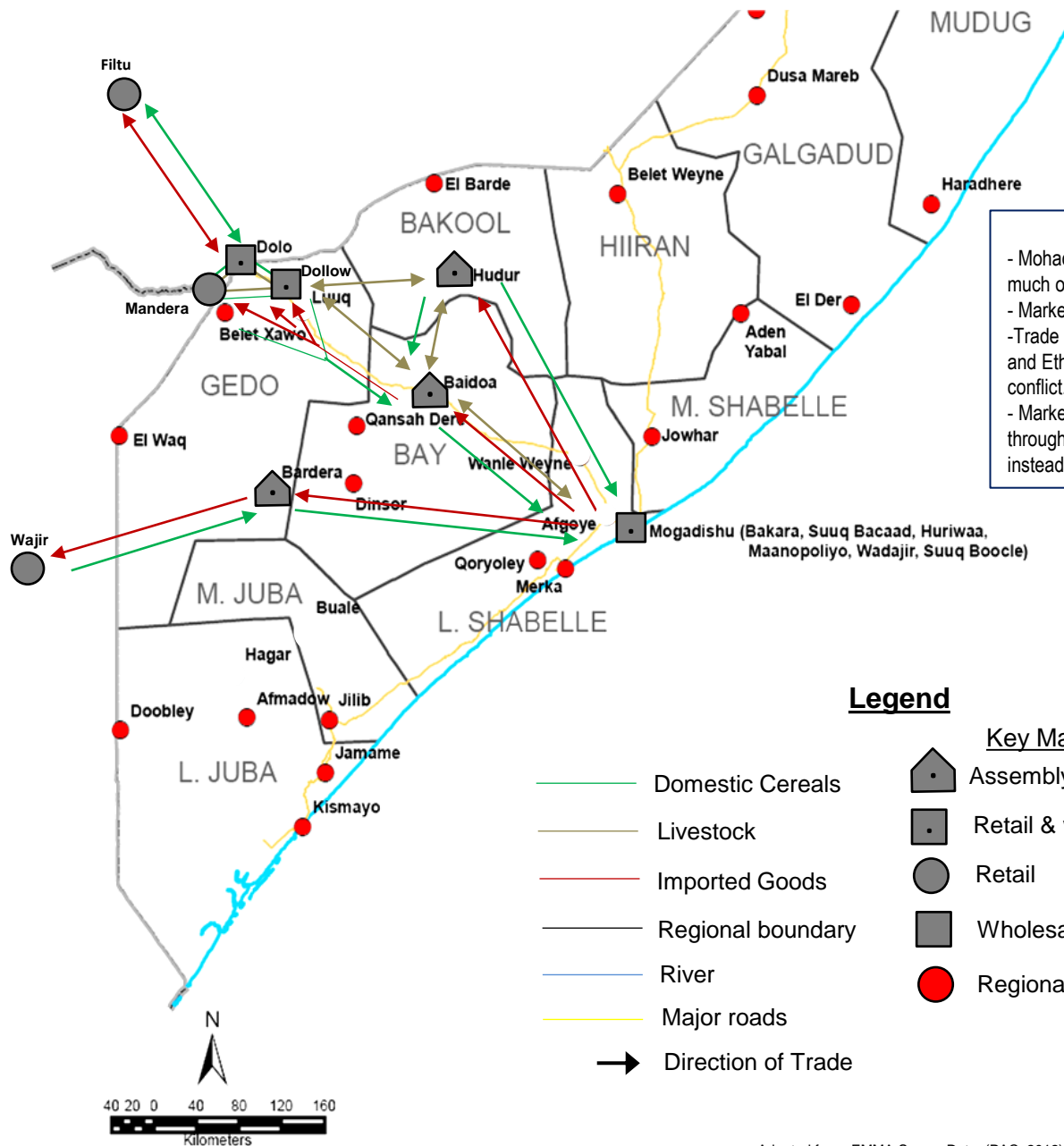


Figure 4

# Main Trade Flows

(Sept 2011)



Trends

- Mohadishu supplies imported commodities for much of the trade basin.
- Markets are stronger than we think.
- Trade between markets in Gedo and the Kenyan and Ethiopian borders function amidst drought and conflict.
- Markets in Bay and Bakool receive a minor through-flow of goods from the border and are instead subservient to Mogadishu imports.

## Legend

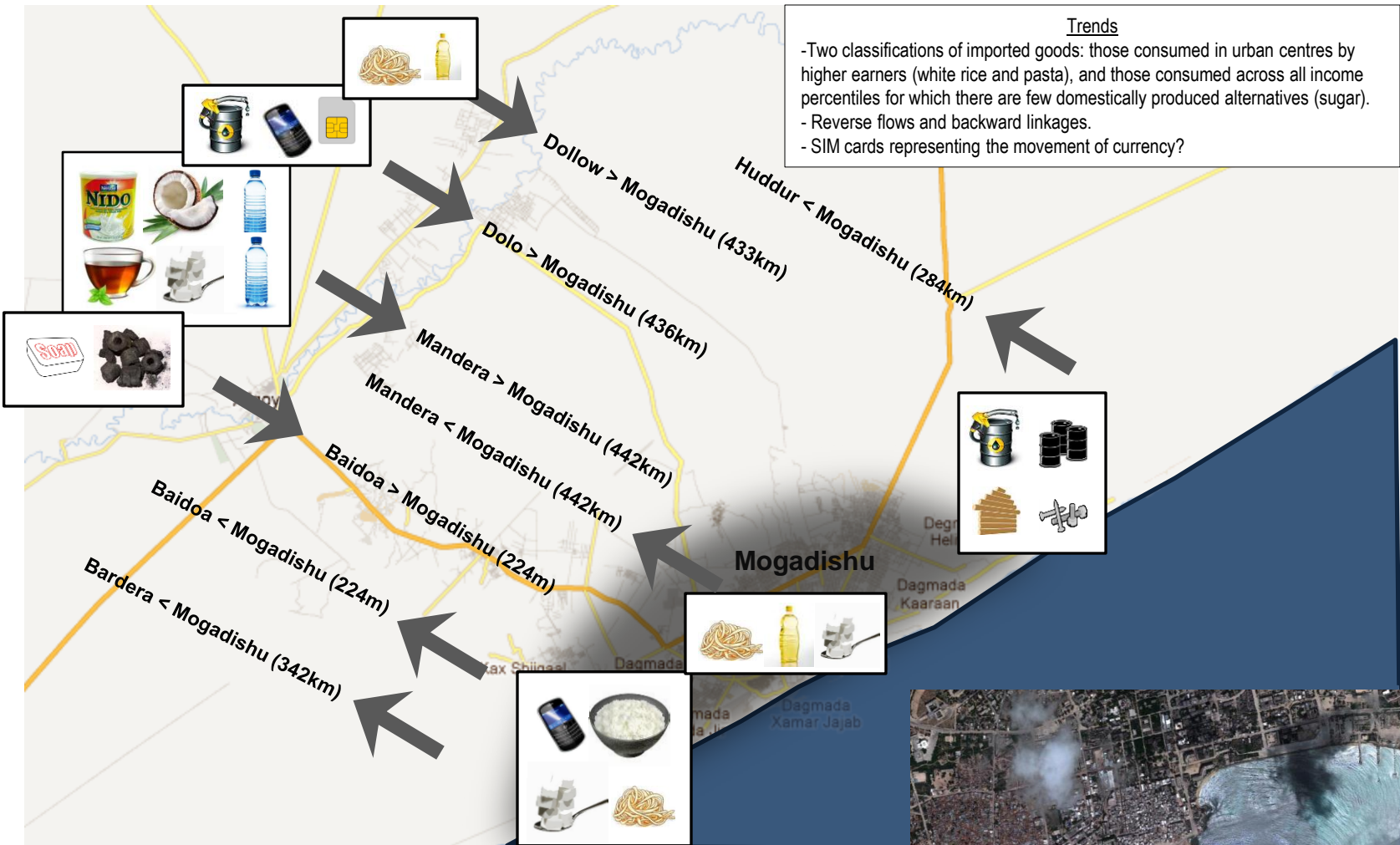
- |  |                    |  |                                |
|--|--------------------|--|--------------------------------|
|  | Domestic Cereals   |  | Assembly, wholesale and retail |
|  | Livestock          |  | Retail & wholesale             |
|  | Imported Goods     |  | Retail                         |
|  | Regional boundary  |  | Wholesale                      |
|  | River              |  | Regional markets (unmonitored) |
|  | Major roads        |  |                                |
|  | Direction of Trade |  |                                |

Adapted from: EMMA Survey Data. (PAC, 2012). Base map sourced from: FSNAU Monitored Markets Map.

Figure 5

# Flow of Imported Items to/from Mogadishu

(Sept 2011)



- |  |            |  |        |  |               |  |             |
|--|------------|--|--------|--|---------------|--|-------------|
|  | Soap       |  | Petrol |  | Bottled Water |  | Charcoal    |
|  | Sugar      |  | Timber |  | Cooking oil   |  | SIM Cards   |
|  | White rice |  | Nails  |  | Milk Powder   |  | Air time    |
|  | Pasta      |  | Oil    |  | Tea Leaves    |  | Coconut Oil |



Adapted from: EMMA Survey Data. (PAC, 2012).



Figure 6

# Urban Areas Receiving IDPs

(01 Dec 2011 – 17 Feb 2012)

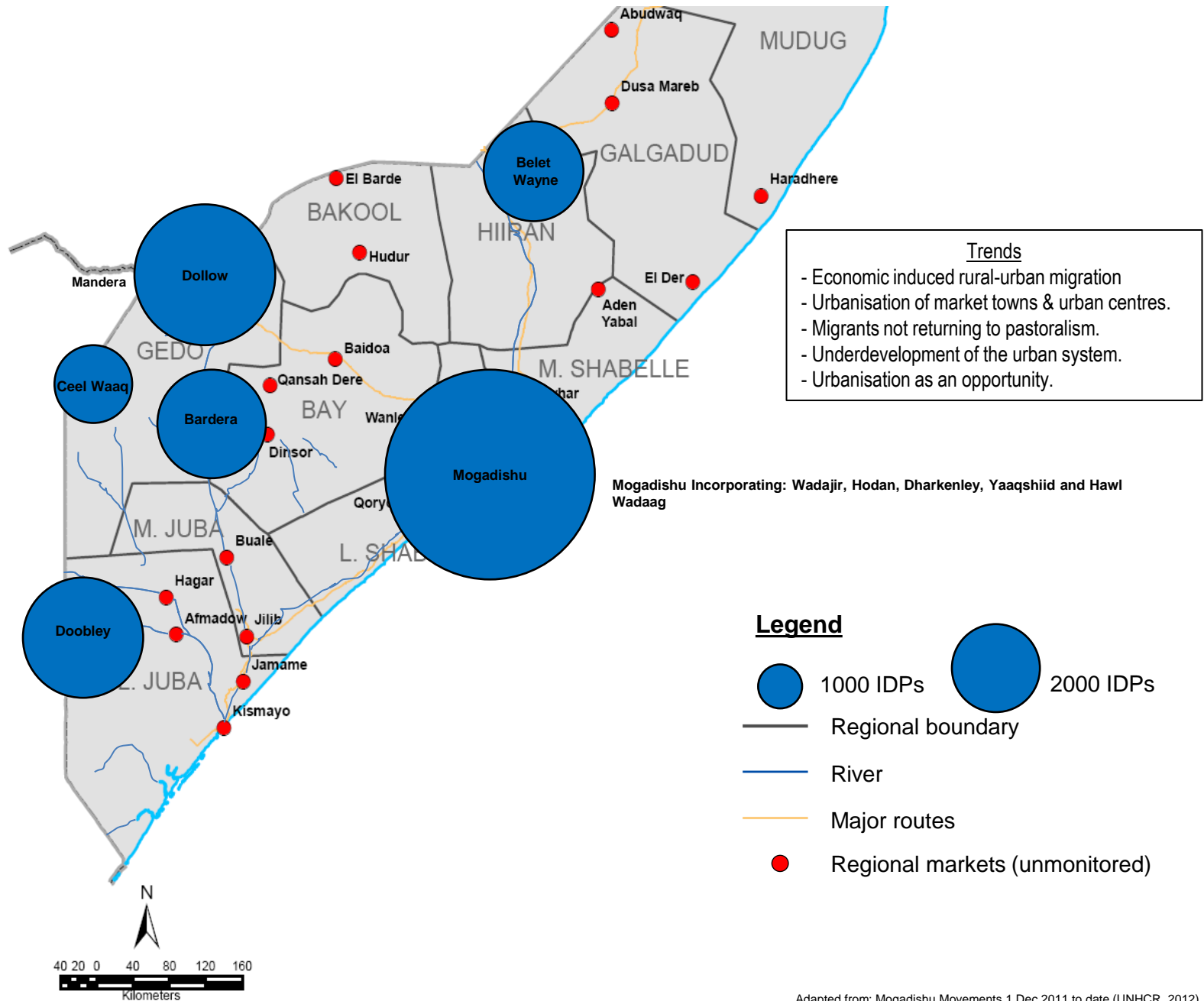


Figure 7

# Points of Origin

(01 Dec 2011 – 17 Feb 2012)

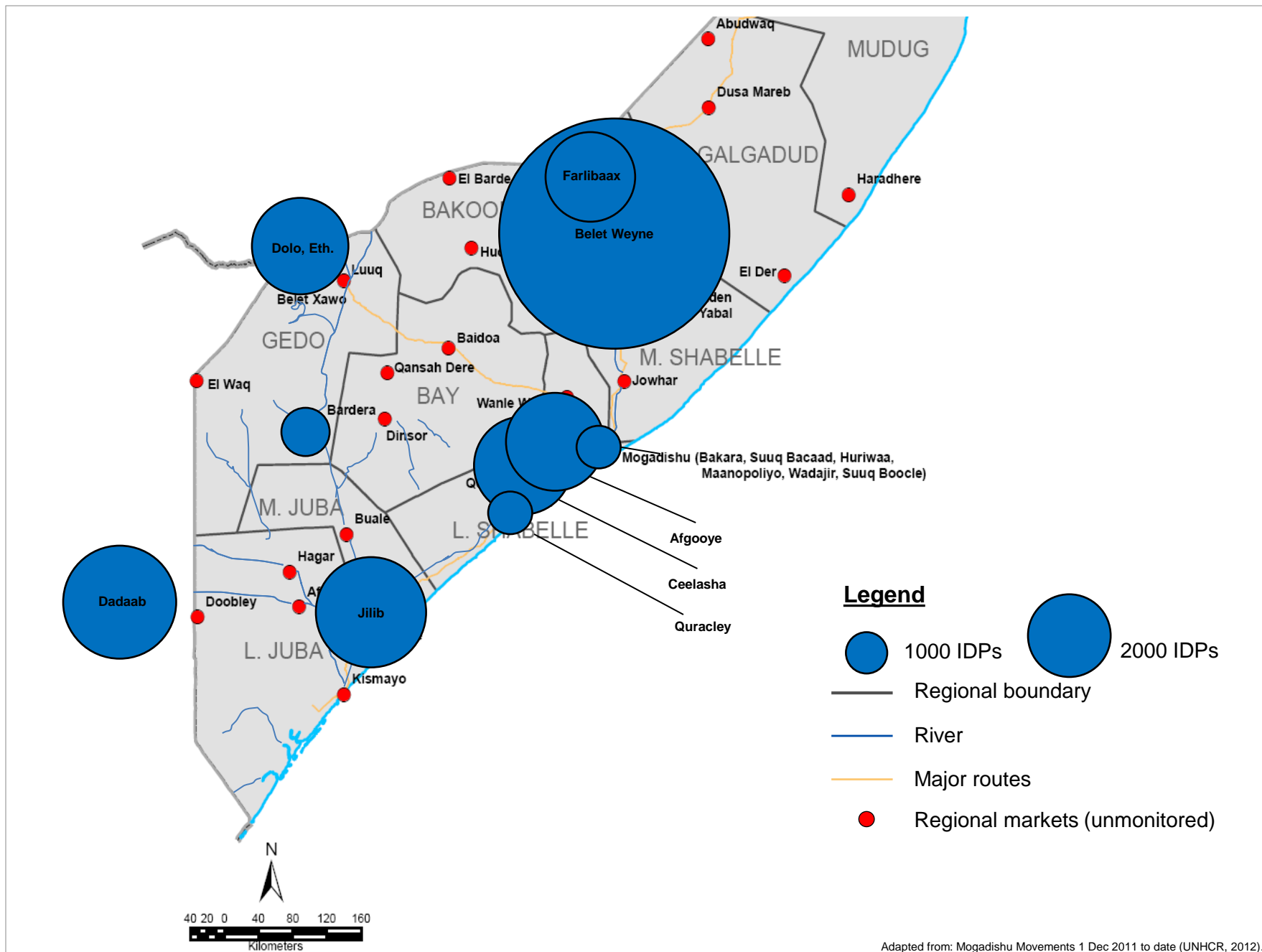


Figure 6

### Urban Areas Receiving IDPs

(01 Dec 2011 – 17 Feb 2012)

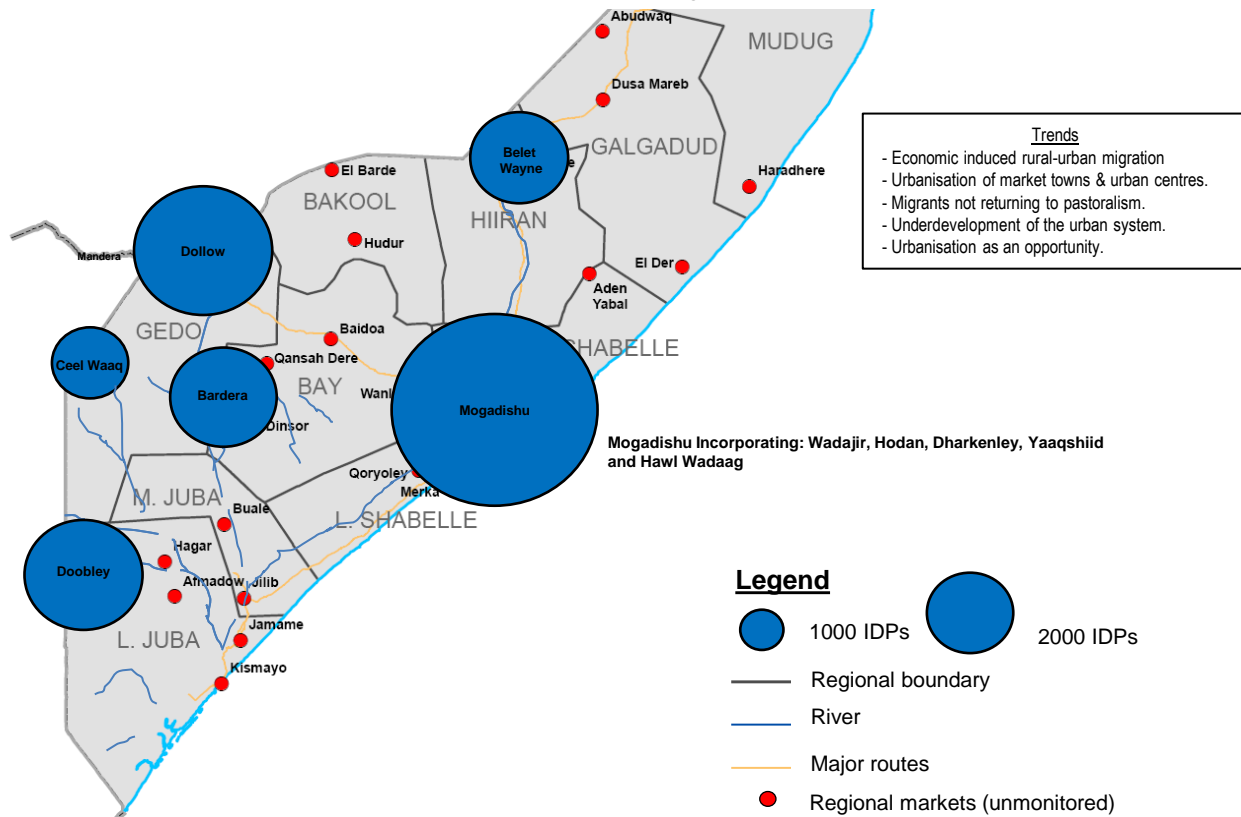
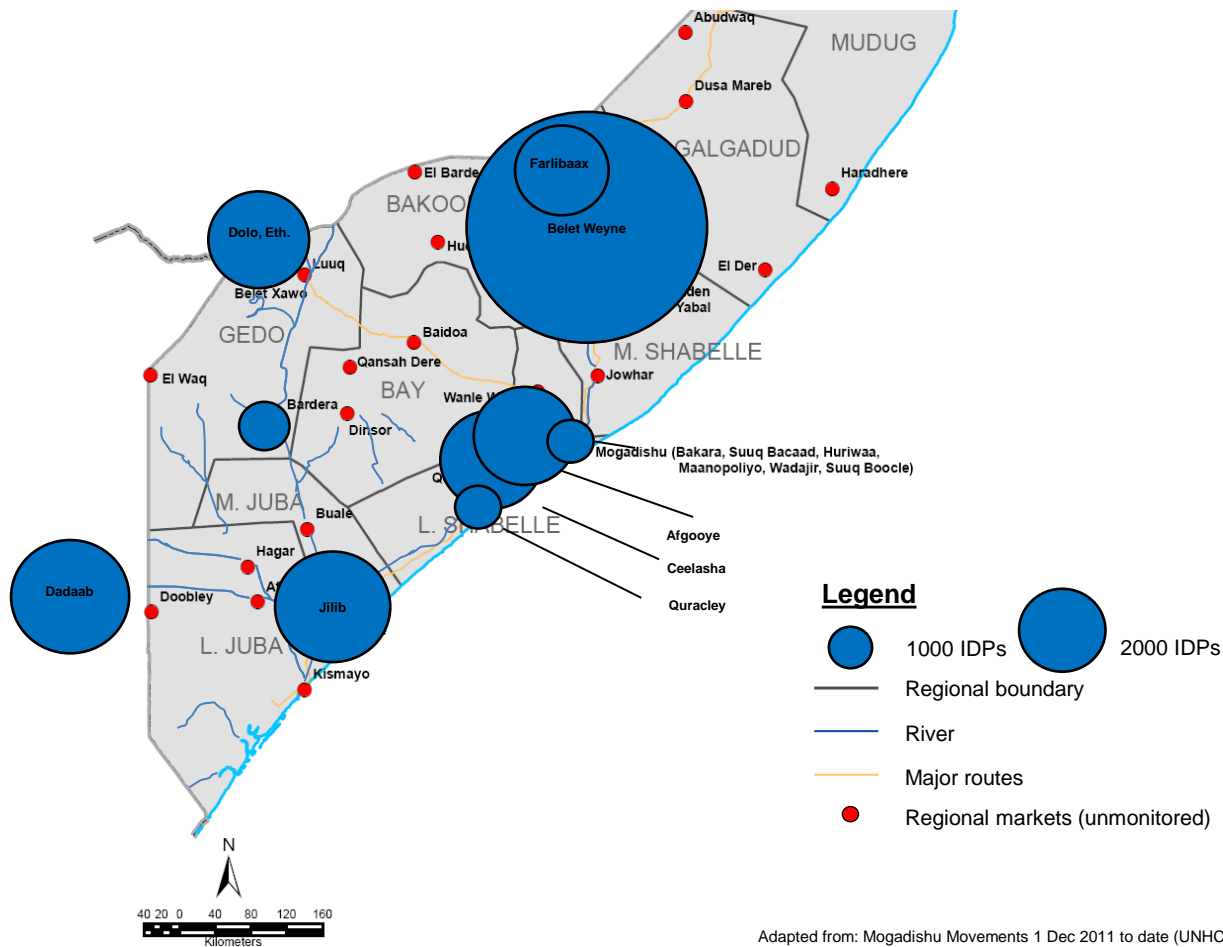


Figure 7

### Points of Origin



# Problems & Opportunities

Credit



Transport



Energy



Work ethic



We need to understand markets so we invest where it makes sense to do so.

How do we make international trade benefit Somalis?

How do we best empower people through employment creation?

How do we work collectively to address problems and exploit opportunities ?