

# LASER PULSE

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Partners for University-Led Solutions Engine (PULSE)

BHA/TPQ/SPADe Somalia RFSA Activity Design Project  
Desk Review and Market Study

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## **ABOUT THE PROJECT**

This Desk Review and Market Study (DRMS) is one of the BHA/TPQ/SPADe Somalia RFSA Design project's deliverables. The research undertaken under this project will inform the design of future multi-year Resilience and Food Security Activities (RFSA) in Somalia. The project is supported via a buy-in from USAID's BHA/TPQ/SPADe into the Long-Term Assistance and Services for Research (LASER) Project currently in place between USAID/DDI/ITR/R and Purdue University under a cooperative agreement # 7200AA18CA00009. The BHA/TPQ/SPADe Somalia RFSA Activity Design project has been executed by Consilient Research under a sub-contract with Purdue University.

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## **ABOUT LASER PULSE**

LASER (Long-term Assistance and Services for Research) PULSE (Partners for University-Led Solutions Engine) is a \$70 million program funded through USAID's Innovation, Technology, and Research Hub, which delivers research-driven solutions to field-sourced development challenges in USAID partner countries.

A consortium led by Purdue University, with core partners Catholic Relief Services, Indiana University, Makerere University, and the University of Notre Dame, implements the LASER PULSE program through a growing network of 3,500+ researchers and development practitioners in 86 countries.

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**ACRONYMS**

AOI	Area of Interest
AWD	Acute watery diarrhea
BHA	Bureau of Humanitarian Affairs
BRAC	Bangladesh Rehabilitation Assistance Committee
BRCiS	Building Resilient Communities in Somalia
CBT	Cash-based transfers
CCCM	Camp Coordination and Camp Management Cluster
COOPI	Cooperazione Internazionale
DNS - FGS	Directorate of National Statistics, Federal Government of Somalia
DRMS	Desk Review and Market Study
FAO	United Nations Food and Agriculture Organization
FEWS NET	Famine Early Warning Systems Network
FGD	Focus group discussion
FGS	Federal Government of Somalia
FSNAU	Food Security and Nutrition Analysis Unit
GAM	Global Acute Malnutrition
HARBS	Humanitarian Assistance and Resilience Building in Somalia
HDDS	Household dietary diversity score
IDP	Internally displaced persons
IMF	International Monetary Fund
IOM	International Organization for Migration
IPC	Integrated Food Security Phase Classification
KII	Key informant interview
LASER PULSE	Long-term Assistance and Services for Research Partners for University-Led Solutions Engine
NDP	National Development Plan
NGO	Nongovernmental organizations
UK	United Kingdom
UN	United Nations
UNHCR	United Nations High Commissioner for Refugees
UNICEF	United Nations Children's Fund
US	United States
USAID	United States Agency for International Development
WASH	Water, sanitation, and hygiene
WFP	World Food Program

## EXECUTIVE SUMMARY

### PURPOSE

The Somalia Desk Review and Market Study (DRMS) is intended to provide the United States Agency for International Development/Bureau for Humanitarian Assistance (USAID/BHA) and potential implementing partners of USAID/BHA Resilience Food Security Activities (RFSAs) with a deep contextual understanding of the resilience, food, and nutrition security context and stakeholders in Somalia to inform key activity design considerations. The DRMS also explores how current market systems, conditions, and operating environments may influence implementation of the Graduation Approach to help extremely poor households escape from poverty traps to improve resilience and food security.

### METHODOLOGY

The DRMS utilized a mixed methods approach, including review and analysis of over 50 secondary data sources and collection and analysis of quantitative and qualitative data from the area of interest (AOI). Primary quantitative and qualitative data was collected in September and October 2023 within camps for internally displaced persons (IDPs) and host communities in six areas of interest in southern and central Somalia: Afgoye, Baidoa, Hudur, Jowhar, Kismayo, and Mogadishu. Seven commodities—cowpea, maize, rice, sesame, sorghum, livestock (including camels, goats, and sheep), and fisheries—are focused on within the DRMS.

### CONTEXT

**Demographic context:** Nearly 70 percent of the population of Somalia lives in monetary poverty and almost 90 percent in multidimensional poverty. While poverty is a widespread phenomenon, dimensions of marginalization, including displacement, gender, age, and clan affiliation, intersect to deepen poverty and influence the way individuals experience poverty.

**Displacement:** Somalia hosts 3.9 million IDPs who generally experience more significant economic challenges and live in less favorable conditions than non-displaced residents. IDPs are more likely than host communities to rely on informal labor as their primary livelihood and income source. Many IDPs lack access to land to grow crops or raise livestock, limiting their ability to engage in livestock or agricultural production and trade.

**Environmental context:** Somalia has a generally arid and semi-arid climate with scarce and erratic precipitation. Soil quality is poor in many areas and has deteriorated in the past decades because of prolonged intensive use and mismanagement. Floods during the rainy season frequently damage crops and infrastructure and lead to the proliferation of crop pests and insects, which harms crop outcomes, while droughts lead to widespread losses of assets, income, and livelihoods.

**Key stakeholders:** The World Food Program is the leading provider of food aid in Somalia, employing cash-based transfers and in-kind distribution. Other stakeholders, including the United States Agency for International Development (USAID) and other bilaterals, United Nations agencies, and international and Somali nongovernmental organizations (NGOs) are also involved in food aid support and programming related to nutrition, resilience, water, sanitation, hygiene, health, and displacement. Somalia

government ministries play an important role in promoting health and nutrition and adopting policies in the country, but have limited funding to implement independent interventions.

Social networks and clan affiliations often influence access to food aid. Barriers to access are particularly salient in IDP settlements occupied by minority clan groups, as these groups rarely have networks (or share a clan) with individuals who can influence the distribution of food aid. The terrorist group al-Shabaab also has a significant influence over the distribution of food aid and the functioning of food markets.

## KEY FINDINGS

### FOOD AVAILABILITY

**Domestic supply context:** Somalia faces a persistent shortage of locally produced food, meeting only 22 percent of per capita cereal needs. Even during optimal agricultural seasons local output covers only 40–50 percent of requirements. Irregular contributions of domestic cereals to the overall supply are attributed to consecutive seasons of rainfall failures, drought, and the presence of inefficient and deteriorating irrigation infrastructure. Escalating conflicts and civil instability further undermine local cereal production.

IDPs infrequently have access to assets, including food and livestock, required to engage in the production of food. Additional challenges to domestic production include unpredictable weather, water scarcity, pests and crop/livestock diseases, poor transportation networks which lead to elevated input costs, and lack of capital or credit to purchase seeds, fertilizers, and other inputs.

**Import dynamics:** Since the late 1980s, agricultural imports in Somalia have increased eighteen-fold as of the early 2020s. This surge is attributed to heightened domestic food demand fueled by rapid population growth, urbanization, and substantial remittance support, coupled with limited domestic crop production. The heightened reliance on imports renders Somalia susceptible to international shocks impacting import prices.

**Market characteristics:** Multiple local markets selling crops, livestock, and other items to community members exist within each location in the AOI. Within these markets, vendors of different crops and livestock are generally co-located; markets exclusively for livestock are also common. Within the AOI, IDPs were located an average of 2.4 kilometers from their closest markets and host community members 1.6 kilometers from their closest markets. The government issues licensing permits for market vendors but maintains a minimal role in market dynamics. While entry into markets is relatively accessible, IDPs and minority clan members typically encounter more challenges than host community members. Women are active in markets as small-scale traders but face challenges participating as wholesalers or in major food production or import corporations.

**Market integration and prices:** About 80 percent of south-central Somalia's agricultural land is controlled by al-Shabaab, hindering rural-urban market connections. Despite this, southern Somalia's markets demonstrate effective integration. Prices for locally grown crops are generally lower than imported commodities, including rice. Crop prices increase during the lean season, while livestock prices in most of the AOI fall during the lean season.

**Infrastructure and impact on markets:** Most roads in Somalia are in poor condition with some deteriorating to the point of impassibility in the rainy season. Illegal road taxation by both al-Shabaab and militia groups at various checkpoints, along with high government taxation along roads and at ports, pose significant challenges for producers and increase food costs for consumers. Seaports in Mogadishu and Kismayo are operational but lack maintenance. Access to storage is limited. Widespread access to telecommunications and mobile phones enables robust communication and mobile money transfers.

#### **FOOD AID**

Over the past 15 years, Somalia has largely transitioned from in-kind food assistance to cash transfers and vouchers, which has been viewed positively by researchers and recipients. Mobile money transfers have gained popularity as a prevalent form of cash transfers; however, individuals with limited access to mobile phones, who are illiterate, or who have disabilities may have difficulty receiving these transfers. Conversely, vouchers can face more vulnerability to diversion by “gatekeepers” or IDP camp authorities; as such, mobile cash transfers are often preferred by IDPs.

#### **FOOD ACCESS**

For most individuals, local markets are their primary source of food. Other means of food access include bartering, home-based production, and gifts/loans. Safety concerns, limited income, seasonal price fluctuations, age, gender, and clan affiliation influence access to markets. Limited access to income generation opportunities constrains access to food, especially for women and older individuals; safety considerations, especially on roads leading to markets, also limit women’s access to markets.

On average, only 4 percent of IDP households rely on home-based production to access food. IDPs often lack access to land for cultivating crops and face the constant threat of eviction. In larger cities like Mogadishu and Baidoa, the most vulnerable communities typically rely on humanitarian aid to access food.

Cereals are the most consumed food group, followed by sugar and oils/fats. IDP and host community households primarily favor imported foods such as rice, pasta, and flour, even though these are not locally produced. During periods of drought or when preferred foods are unavailable due to shortages, households shift their consumption towards locally grown staples like sorghum, cowpeas, and maize. Protein consumption is limited.

#### **FOOD UTILIZATION AND MALNUTRITION**

**Malnutrition and dietary diversity:** Malnutrition is widespread in Somalia, with most population groups facing either critical or serious acute malnutrition. Child malnutrition is widespread; an estimated 1.5 million children in Somalia were acutely malnourished between October and December 2023 and only 11 percent of children are fed according to recommended practices. Malnutrition indicators are consistently worse among IDPs than in host communities. Some of the primary drivers of acute malnutrition include low-quality diets, inadequate food consumption, and poor access to safe water and sanitation, which leads to health issues such as diarrhea that exacerbate malnutrition. Malnutrition is also a politicized experience, as power dynamics limit marginalized groups’ access to resources and food aid that bolster nutritional status.



**Water, sanitation, hygiene, and health:** Around 52 percent of Somalis have access to basic drinking water supply, with significant variations between rural areas (28 percent) and urban areas (83 percent). IDPs utilize unprotected and protected but non-permanent (e.g., tanker trucks or bottled water) water sources more frequently than host communities, putting them at greater risk of waterborne illness and increasing the cost of water. Due to limited access to clean water and sanitation, outbreaks of diseases, including acute watery diarrhea, cholera, and measles, are common occurrences. Access to healthcare is generally limited.

## CONCLUSION AND IMPLICATIONS

Somalia faces a persistent shortage of locally produced food, even during optimal agricultural seasons, resulting in high reliance on agricultural imports. Within the AOI, few households—especially IDP households—have access to assets, including livestock and land on which to farm. These dynamics increase vulnerability to food insecurity and food price fluctuations.

Infrastructure challenges pose a major constraint to both food availability and food access. Weak infrastructure increases the time and cost of transporting food between locations and increases the potential for food spoilage, especially given inadequate storage systems across the AOI. The prevalence of formal and informal taxation along roads, especially by al-Shabaab, further increases transport costs and thus the costs of food. Despite these challenges, southern Somalia’s markets demonstrate integration.

Limited food accessibility and challenges in accessing food lead to high levels of malnutrition, including in children, and low dietary quality. Malnourishment and limited access to water, sanitation, and hygiene, especially in IDP camps and rural areas, intersect to increase susceptibility to disease.

The Graduation Approach framework has clear relevance for impoverished households within the AOI. There is a widespread need for consumption support to improve access to diverse, quality, and sufficient foods. Particularly within IDP communities, which have limited access to assets including land and livestock, asset transfers may play an important role in enabling households to become self-sufficient. Interventions in healthcare, savings, and social integration may then supplement these benefits by addressing the impacts of malnutrition and poor health, improving access to food during lean seasons when income-generating opportunities may be reduced, and helping address dynamics of marginalization that affect food access.

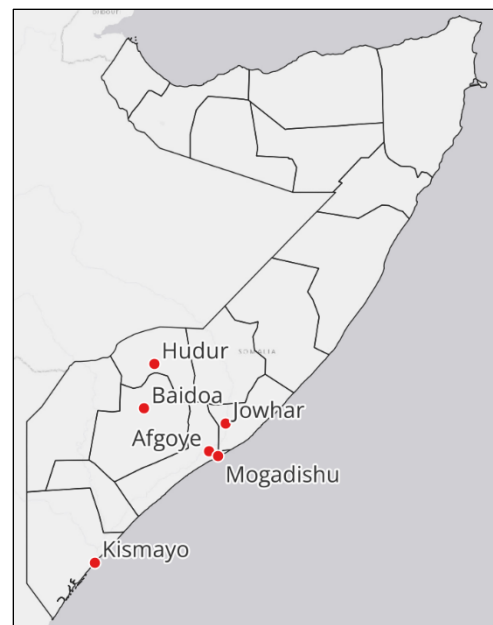
## INTRODUCTION

This report presents the findings of the Somalia Desk Review and Market Study (DRMS) carried out by Consilient Research from July 2023 to November 2023. The DRMS contributes evidence that will inform the United States Agency for International Development’s (USAID) decisions for strategic actions and policies for implementing USAID/Bureau for Humanitarian Assistance’s (BHA) programmatic portfolio. In particular, the research contributes evidence for USAID/BHA Resilience Food Security Activities (RFSA), which seek to improve and sustain the food and nutrition security of vulnerable populations through multi-year resilience, food, and nutrition security activities. These RFSA will also complement USAID/BHA’s intended use of the Graduation Approach<sup>1</sup> to help extremely poor households escape from poverty traps to improve resilience and food security.

Six areas of interest (AOI)—Afgoye, Baidoa, Hudur, Jowhar, Kismayo, and Mogadishu—and seven commodities—cowpea, maize, rice, sesame, sorghum, livestock (including camels, goats, and sheep), and fisheries—were prioritized for the DRMS. The specific research questions include five broad themes: (1) country context, including demographics, livelihoods, and environmental context; (2) key stakeholders in resilience, food, and nutrition security; (3) food availability, including market structure, conduct, and performance, infrastructure, and food aid modalities; (4) food access, including food basket profile, pathways to food access, and factors influencing access; and (5) food utilization and nutrition, including family planning and water, sanitation, and hygiene (WASH). The report is organized according to these themes.

The DRMS utilized a mixed methods approach including review and analysis of over 50 secondary data sources and collection and analysis of quantitative and qualitative data from the AOI. Primary quantitative data included a household survey of 1,611 respondents, market observations in 20 markets, and market vendor surveys with 358 vendors within the 20 markets in the AOI. Household surveys were conducted within internally displaced person (IDP) camps (70 percent of surveys) and surrounding host communities (30 percent). Market selection targeted markets used by IDPs as well as markets selling the full range of target commodities. Primary qualitative data included 78 key informant interviews and focus group discussions with stakeholders including district administrators, women and youth leaders, business owners, members of IDP and host communities, and members of labor and agricultural organizations.

*Figure 1: DRMS Areas of Interest*



<sup>1</sup> The Graduation Approach seeks to empower ultra-poor households and individuals to reach and maintain conditions of greater economic self-sufficiency and resiliency in a sustainable and time-bound manner. The Graduation Approach generally involves participatory targeting and support in the following areas: (1) consumption smoothing, (2) coaching, (3) savings, (4) core training and livelihood skills, (5) asset transfer, and (6) linkages or referrals to other services. See Annex 1 for more details.

## CONTEXT

### DEMOGRAPHIC CONTEXT

**Demographics:** Somalia's total population as of 2021 was estimated at 17.1 million.<sup>2</sup> Approximately half of this population is women, with approximately 32 percent of households headed by women.<sup>3</sup> Societally, women face significant challenges from gender biases and disparities, with issues like patriarchal traditional and religious systems, exclusion from systems of justice and decision-making, and early marriage hindering women's access to education and participation in the job market.<sup>4</sup> Youth under the age of 30, who comprise around three-quarters of the population,<sup>5</sup> also face substantial challenges including one of the world's highest youth unemployment rates, estimated at 68 percent.<sup>6</sup>

Over the past 50 years, Somalia has increasingly urbanized, with migration from rural to urban areas occurring across all regions. This trend is influenced by factors such as conflict, increasingly extreme climatic conditions and weather events, and individuals' aspirations for an improved quality of life.<sup>7</sup> As of 2014, an estimated 51 percent of Somalia's population lived in urban areas. On average, these individuals have more opportunities for education and better access to services than individuals living in rural areas.<sup>8</sup>

**Displacement:** As of July 2023, the United Nations High Commissioner for Refugees (UNHCR) estimated that Somalia hosts 3.9 million IDPs,<sup>9</sup> of which around 1.5 million were displaced because of conflict and the remainder due to natural disasters.<sup>10</sup> Over 2,400 IDP settlements exist across the country, concentrated in urban and peri-urban regions. Within the AOI, estimates place around 500,000 IDPs in Mogadishu, 250,000 in Baidoa, 87,000 in Kismayo, 37,000 in Afgoye, 30,000 in Jowhar,<sup>11</sup> and 30,000 in Hudur.<sup>12</sup>

IDPs experience more significant economic challenges and live in less favorable conditions than non-displaced residents of Somalia.<sup>13</sup> Many IDPs have experienced multiple displacements due to the forcible acquisition of their land or eviction from their settlements, especially in urban areas, a pattern

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<sup>2</sup> As no population census has been conducted in Somalia since before state collapse in 1991, all demographic statistics are approximations. The United Nations Population Fund (UNFPA) estimates that as of 2014, around 2.7 million individuals lived in the AOI; however, this is likely to be a significant underestimate as of 2023 given demographic trends towards urbanization. The 2014 UNFPA survey is the most recent population survey conducted in Somalia as of November 2023.

<sup>3</sup> Directorate of National Statistics, Federal Government of Somalia (DNS - FGS). *The Somali Health and Demographic Survey 2020*. Mogadishu, Somalia: Federal Government of Somalia, 2020, 22.

<sup>4</sup> World Bank. *Federal Republic of Somalia Systematic Country Diagnostic*. Washington, D.C.: World Bank, 2018, 4.

<sup>5</sup> DNS – FGS, 2020, 21.

<sup>6</sup> World Bank and United Nations Food and Agriculture Organization. *Somalia Country Economic Memorandum Volume 1: Rebuilding Resilient and Sustainable Agriculture in Somalia*. Washington, D.C.: World Bank, 2018, 5.

<sup>7</sup> Kularatne, Chandana, Altan Butt, and Muriel Calo. "Food Insecurity in Somalia." In Yang, Fang, Chandana Kularatne, and Rhea Gupta (eds.), *Somalia: Selected Issues*. Washington, D.C.: International Monetary Fund, 2022, 10.

<sup>8</sup> DNS – FGS, 2020, 23-28.

<sup>9</sup> UNHCR. *Somalia Population Dashboard: 1-31 July 2023*. Geneva: UNHCR, 2023a.

<sup>10</sup> UNHCR. *Somalia Situation: Population of Concern to UNHCR as of 31 Aug 2023*. Geneva: UNHCR, 2023b.

<sup>11</sup> UNHCR. *CCCM Somalia Overview*. Geneva: UNHCR, 2022.

<sup>12</sup> Camp Coordination and Camp Management (CCCM) Cluster Somalia. "CCCM Cluster Somalia: List of IDP sites in Somalia." Mogadishu: CCCM Cluster, 2023.

<sup>13</sup> World Bank. *Somali Poverty and Vulnerability Assessment: Findings from Wave 2 of the Somali High Frequency Survey*. Washington, D.C.: World Bank, 2019, xv-xvii.

that exacerbates their loss of assets and livelihoods.<sup>14</sup> A recent influx of IDPs due to drought and famine has placed increasing pressure on food security in IDP settlements.<sup>15</sup>

**Clan:** Clan affiliations play a crucial role in determining individuals' access to resources, political power, legal protection, and security within Somalia; minority clans (generally, clans with a smaller local population or with fewer resources, including livestock and land) often face high levels of marginalization.<sup>16</sup> Clan structures enable the distribution of resources to households in need through mechanisms such as *zaqat* and *sadaqah*. Clan-related conflicts are the predominant source of violent disputes and insecurity in Somalia.<sup>17</sup>

**Poverty:** Somalia has one of the world's highest poverty rates; the IMF estimates that as of 2022, nearly 70 percent of Somalis lived in monetary poverty. Similarly, the World Bank estimates that almost 90 percent of Somali households are deprived in at least one of four dimensions: monetary, access to electricity, education, and water and sanitation.<sup>18</sup> While little subnational data on poverty is available, the World Bank estimates that monetary poverty is lower, on average, in urban areas (64 percent) compared to rural areas (72 percent) and IDP settlements (76 percent).<sup>19</sup> Estimates of monetary poverty for the AOI range from 84 percent in Baidoa and 73 percent in Mogadishu to 35 percent in Kismayo.<sup>20</sup>

While poverty is a widespread phenomenon in Somalia, various dimensions of marginalization intersect to deepen poverty and influence the way individuals experience poverty. The World Bank finds that poverty is deepest in rural areas and IDP settlements and that children and households that do not receive remittances are disproportionately poor.<sup>21</sup> The United Nations Accountability Project finds that members of marginalized groups, including minority clans, are more vulnerable to food insecurity, in part due to high poverty levels.<sup>22</sup> Widespread and multidimensional poverty shows the importance of the Graduation Approach's holistic interventions; however, it is also important to note that social capital and marginalization—issues that the Graduation Approach does not directly address—also have a large influence on poverty. As such, while the Graduation Approach may provide a useful means to address multiple, reinforcing drivers of poverty, further research is needed on some of the other types of drivers it might address.<sup>23</sup>

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<sup>14</sup> United Nations Development Program (UNDP). *Somalia Drought Impact and Needs Assessment: Volume I: Synthesis Report*. Mogadishu, Somalia: UNDP, 2018, 30.

<sup>15</sup> Kularatne, Butt, and Calo, 2022, 2.

<sup>16</sup> The specific clans defined as "minority" vary between locations; a clan which forms the majority in one location may be the minority in another location.

<sup>17</sup> World Bank, 2018, 10.

<sup>18</sup> World Bank, 2019, xvi. We note that Somalia is unranked on the Human Development Index due to a lack of comprehensive data on education.

<sup>19</sup> *Ibid*, xviii.

<sup>20</sup> *Ibid*, 45.

<sup>21</sup> *Ibid*, 45.

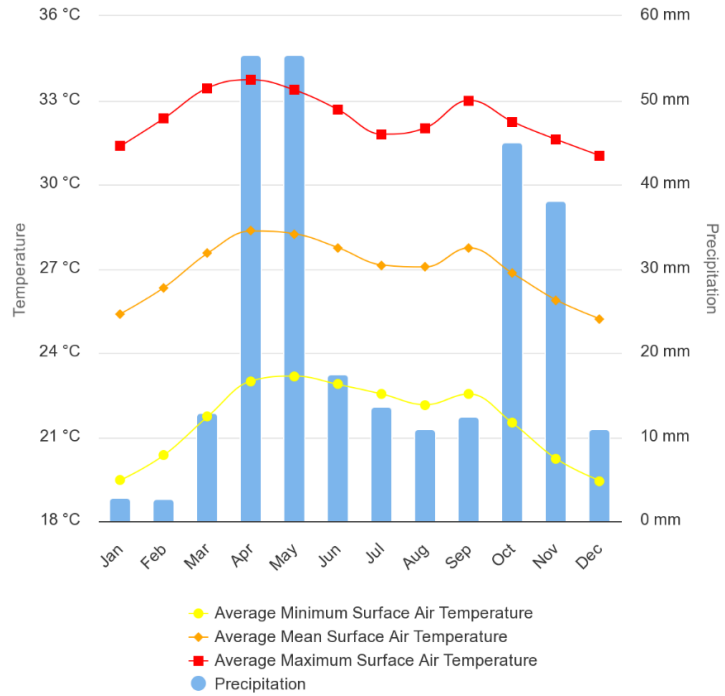
<sup>22</sup> United Nations Accountability Project – Somalia. "Neither Inevitable nor Accidental: The Impact of Marginalization in Somalia." In *War and Peace in Somalia: National Grievances, Local Conflict and al-Shabaab*, edited by Michael Keating and Matt Waldman, 275-284. New York: Oxford University Press, 2018.

<sup>23</sup> See Wicaksono and King, 2023 for more detail about relevant political economy issues affecting poverty that may influence use of the Graduation Approach.

**ENVIRONMENTAL CONTEXT**

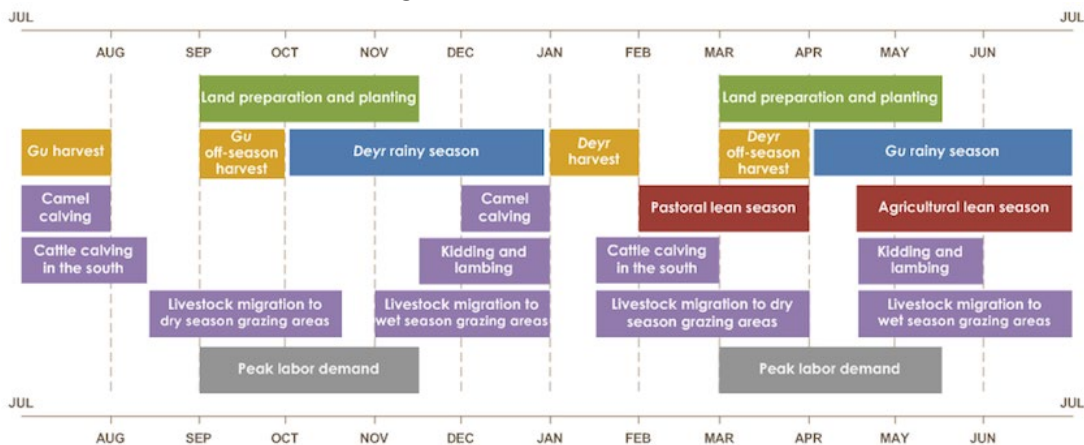
**Climate zone and rainfall:** Somalia is arid and semi-arid with two rainfall seasons, the *gu* (April to June) and *deyr* (October to December), and two dry seasons, the *hagaa* (July to September) and *jilaal* (January to March).

Agricultural and livestock production activities, including casual labor activities, occur periodically around these seasons (Figure 3). Precipitation is generally scarce and erratic, with an average annual rainfall of about 200 millimeters in most regions. The El Niño Southern Oscillation significantly impacts Somalia's climate, leading to increased rainfall and flooding during El Niño and droughts during La Niña years.<sup>24</sup> Flooding is particularly associated with El Niño events following La Niña years and is most severe in riverine flood basins, including the lower Juba and lower Shabelle areas.<sup>25</sup> Drought is a frequent occurrence, with recent severe droughts occurring during 2011, 2016/17, and 2022.



Source: World Bank, 2023, 7

Figure 3: Seasonal Calendar



Source: FEWS NET, 2023

<sup>24</sup> World Bank. *Somalia Climate Risk Review*. Washington, D.C.: World Bank, 2023, 8.

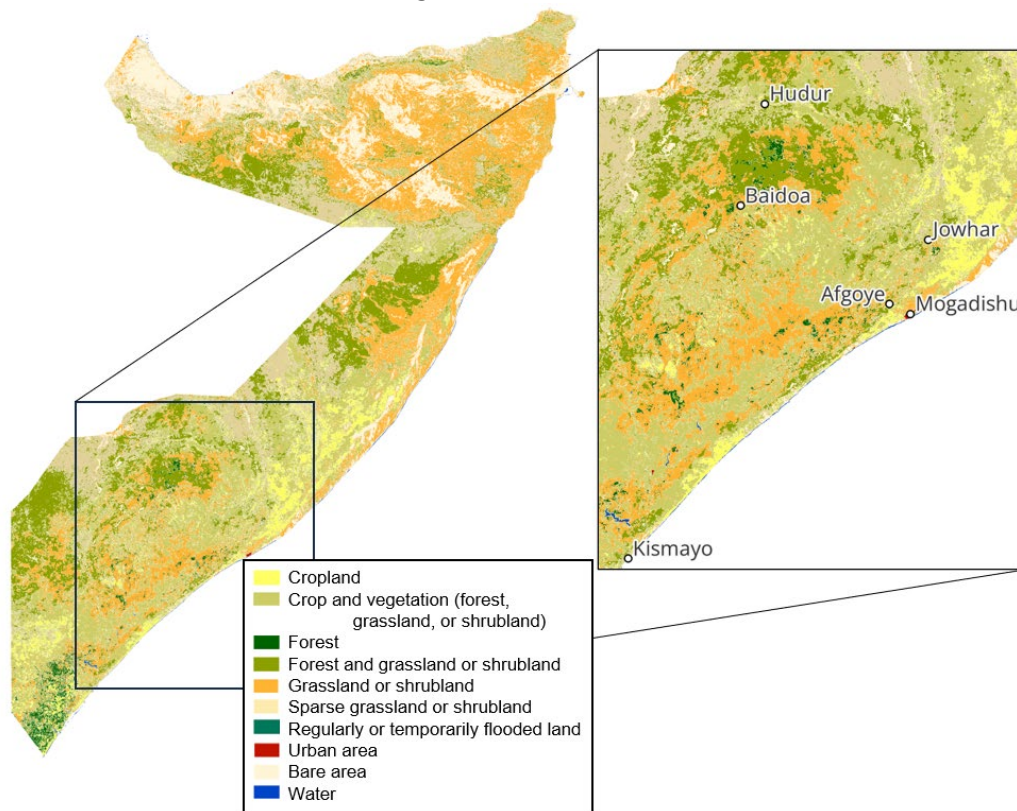
<sup>25</sup> Food Security and Nutrition Analysis Unit (FSNAU) and Famine Early Warning Systems Network (FEWS NET). *Somalia Livelihoods Profile*. Washington, D.C.: FSNAU and FEWS NET, 2016, 171.

**Soil conditions:** Southern Somalia, including the AOI, is characterized by extensive low-lying alluvial plains primarily associated with the Juba and Shabelle rivers. These plains feature clayey soils, some of which have poor drainage and high salt content, as well as shallow soils (especially near the Ethiopian border) and deeper loamy soils.<sup>26</sup>

In the past several decades, soil quality in Somalia has deteriorated because of prolonged intensive use and mismanagement, including the lack of appropriate land use governance. The most prevalent forms of land degradation are topsoil loss and declining soil moisture.<sup>27</sup>

**Land cover and use:** The predominant land cover types in Somalia are grassland/shrubland, mixed crop and vegetation, cropland, and sparse grassland/shrubland (Figure 4). Cropland mainly occurs near the Juba and Shabelle rivers. Unsustainable charcoal production in the 2000s led to massive deforestation, deterioration of grasslands, desertification, soil erosion, and a reduction of land use for agricultural and pastoral livestock production. Weak land governance systems (traditional and formal) have also led to negative land use changes since state collapse, including the spread of private enclosures, expansion of cultivated areas into grasslands, and overgrazing.<sup>28</sup>

Figure 4: Land Cover



<sup>26</sup> United Nations Food and Agriculture Organization (FAO). *Planting Material and Storage Inputs Assessment in Somalia*. Rome: FAO, 2023b.

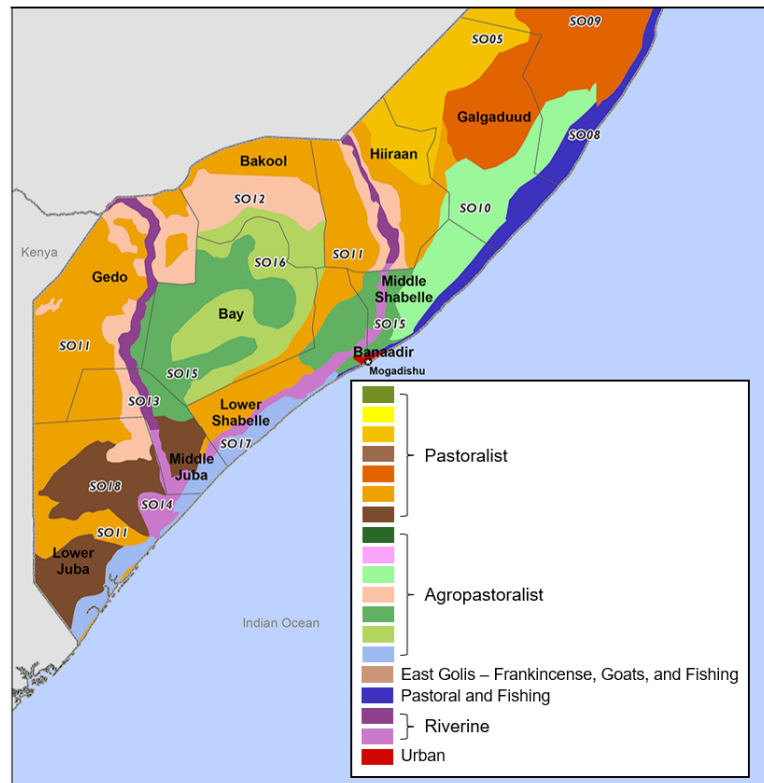
<sup>27</sup> FAO. *Status of the World's Soil Resources: Regional Assessment of Soil Changes in Africa South of the Sahara*. Rome: FAO, 2015, 248-9.

<sup>28</sup> World Bank and FAO, 2018, 50.

**LIVELIHOODS CONTEXT**

**Rural livelihoods:** There are four primary groups of rural livelihoods: pastoralist, agropastoralist, riverine agriculture, and coastal (see Figure 5).<sup>29</sup> Within pastoral zones, wealth is determined by livestock, particularly camels, with livestock sales contributing significantly to household incomes. Within agropastoral and agricultural zones, wealth is influenced by land, crops, and livestock. In agropastoral zones, labor, mainly agricultural, additionally provides about one-quarter of household income, while in riverine agricultural zones, income comes from both food crops and cash crop sales. In coastal zones, fishing additionally contributes to income. Within the AOI, Baidoa and Hudur districts fall within agropastoralist livelihood zones while Afgoye, Jowhar, and Kismayo districts fall within both riverine agriculture and agropastoralist zones. Mogadishu is classified as an urban livelihood zone.

Figure 5: Livelihood Zones



**Urban livelihoods:** Mogadishu and other urban centers like Baidoa and Kismayo, feature urban livelihoods. Within urban areas, livelihoods typically include self-employment, casual labor, and ownership of informal micro or small businesses; waged employment is uncommon. Individuals may also be engaged in livestock or agricultural trade, as urban areas serve as key market centers for individuals engaged in livestock or crop production. During times of drought or flooding, pastoralists and agropastoralists may migrate to urban areas to engage in casual labor.<sup>30</sup>

**IDPs:** Displaced persons are more likely than host communities to rely on informal labor, such as street vending, casual work, and small-scale services, as their primary livelihood and income source. Many IDPs lack access to land on which to grow crops or raise livestock, limiting their ability to engage in livestock or agricultural trade. As such, under the Graduation Approach, it may be ineffective to transfer assets, such as livestock or seeds, to IDPs, as the use of these assets requires access to land.

**Vulnerability and coping strategies:** Somalia’s seasonality and susceptibility to shocks, including drought and floods, significantly impact livelihoods. As a resilience strategy, pastoral communities tend to move

<sup>29</sup> FSNAU and FEWS NET, 2016, 9.

<sup>30</sup> Ibid, 46.

seasonally to access water and pasture and ensure healthier livestock and more milk. Agropastoral households migrate during dry periods to access pasture and water but return to their home community when rains arrive to cultivate crops. Purely agricultural zones align their activities with the rainy season.<sup>31</sup>

Floods during the rainy season frequently damage crops and infrastructure and lead to the proliferation of crop pests and insects, which harms crop outcomes.<sup>32</sup> Droughts, especially extended droughts, frequently lead to widespread losses of assets, income, and livelihoods;<sup>33</sup> in 2020, for example, an estimated 3.8 million livestock died, and cereal harvests were the second-lowest ever recorded in Somalia because of drought.<sup>34</sup> In pastoral zones, droughts also lead to deterioration of grazing lands, weakening of livestock, reduced milk production, and depressed livestock prices, while in agricultural zones, droughts lead to lower crop yields, reduced demand for agricultural labor, and declines in the surplus of crops available for consumption.<sup>35</sup> Accordingly, droughts lead to acute food insecurity and famine, both of which tend to disproportionately affect marginalized populations, especially minority clan groups and IDPs.<sup>36</sup> The vulnerability of these populations is driven by unequal power dynamics which reduce access to land, assets, and food aid;<sup>37</sup> limited social networks to facilitate asset-sharing;<sup>38</sup> and limited ability to raise funding through remittances.<sup>39</sup>

To deal with the impact of shocks, poor pastoral and agropastoral households commonly cope through strategies including migration with livestock or to find labor opportunities; increasing sales of milk, livestock, charcoal, or other assets; splitting of families to search for labor or migrate with livestock; and seeking of gifts or loans. Poor agricultural households commonly cope by increasing agricultural labor, migrating to urban centers, searching for temporary labor work (including sharecropping), and reducing the number of daily meals. During lean periods, when household income is low, staple food prices tend to rise, leading to an increased reliance on loans (including high-cost loans) as a coping strategy.<sup>40</sup> Remittances play a crucial role in coping with and reducing food insecurity,<sup>41</sup> although they usually flow back to higher-income households.<sup>42</sup> Under the Graduation Approach, while consumption support or cash transfers will aid households through shocks and during lean periods, increased savings and asset

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<sup>31</sup> Ibid, 14.

<sup>32</sup> Ibid, 20.

<sup>33</sup> World Bank and FAO, 2018, 104.

<sup>34</sup> United Nations Food and Agriculture Organization (FAO). *GIEWS - Global Information and Early Warning System: Country Briefs: Somalia*. Rome: FAO, 2023a.

<sup>35</sup> FSNAU and FEWS NET, 2016, 20 and 200-1.

<sup>36</sup> Majid, Nisar, and Stephen McDowell. "Hidden Dimensions of the Somalia Famine." *Global Food Security* 1, no. 1 (2012): 36–42.

Jaspars, Susanne. "Social Nutrition and Accountability for Mass Starvation." In *Accountability for Mass Starvation: Testing the Limits of the Law*, edited by Bridget Conley, 46-70. Oxford: Oxford University Press, 2022.

<sup>37</sup> Jaspars, 2022, 46-70.

<sup>38</sup> Development Initiatives. *Towards an Improved Understanding of Vulnerability and Resilience in Somalia*. Bristol, United Kingdom: Development Initiatives, 2019.

<sup>39</sup> Majid, Nisar, Khalif Abdirahman, and Shamsa Hassan. *Remittances and Vulnerability in Somalia – Assessing Sources, Uses and Delivery Mechanisms*. Nairobi, Kenya: Rift Valley Institute, 2018, 2.

<sup>40</sup> FSNAU and FEWS NET, 2016, 21-2.

<sup>41</sup> Majid, Abdirahman, and Hassan, 2018, 1.

<sup>42</sup> Kularatne, Butt, and Calo, 2022, 10.



ownership will also help strengthen the resilience of households and reduce their reliance on negative coping strategies such as loan-taking.

## KEY STAKEHOLDERS

To respond to widespread food and nutrition insecurity and limited resilience across Somalia, the Federal Government of Somalia (FGS) and other Somalia government actors, bilateral actors, United Nations agencies, and nongovernmental actors are actively involved in providing food aid and emergency response, support IDPs, build resilience, and improve nutrition and health outcomes, among other interventions. In this section, we discuss key stakeholders involved in these efforts.

### SOMALIA GOVERNMENT ACTORS

The Federal Ministry of Agriculture and Irrigation and Ministry of Livestock, Forestry, and Range and state Ministries of Agriculture and Livestock collaborate with international donor agencies, including the UN and bilateral agencies, to facilitate food security and food production programs. Federal and state Ministries of Health promote and provide health and nutrition services, focusing on women, children, and vulnerable groups. However, these ministries have limited ability to implement independent programming due to highly limited funding.<sup>43</sup>

The federal Ministry of Labor and Social Affairs is primarily responsible for social protection and inclusion programming. This ministry supports the Baxnaano program (“Shock Responsive Safety Net for Human Capital Project”)<sup>44</sup> which provides cash transfers to targeted poor and vulnerable households to meet consumption needs and protect against food insecurity and malnutrition. Within the AOI, Baxnaano is active in Hudur, where 91 percent of surveyed households were aware of the program and 42 percent had received transfers through the program. Improved access to food was a commonly reported benefit among households who received transfers.

The federal Ministry of Planning and National Development is responsible for coordinating between government institutions, development partners, the private sector, and civil society. However, this ministry—and most other government agencies—has relatively little power to effectively coordinate or influence aid or donors. Furthermore, UN agencies, along with the private sector and nongovernmental government organizations (NGOs), often serve as service providers instead of government ministries.<sup>45</sup>

Key policies include the Somali National Development Plan (NDP) 2020–2024, which underscores the government’s commitment to improving food security and nutrition by partnering with development agencies. The Somalia Nutrition Strategy (2020–2025), drafted by the Ministry of Health, aligns with the

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<sup>43</sup> In 2021, for example, the federal Ministry of Agriculture and Irrigation received US\$1.4 million from the federal budget while the Ministry of Livestock, Forestry, and Range received US\$850,000. For these two ministries combined, this equates to only US\$0.13 of funding per capita given a population of around 17.1 million. Funding for state ministries is generally even more limited; for example, in 2020, the Jubaland Ministry of Agriculture and Livestock received US\$1.2 million from the state budget and the South West State Ministry of Agriculture and Livestock only US\$200,000. Ministries of Health are relatively better funded but still lack funding in absolute terms; the federal Ministry of Health, for example, received US\$21.1 million from the state budget in 2021.

<sup>44</sup> This program is also funded and supported by WFP and the World Bank.

<sup>45</sup> Jaspars, Susanne, Guhad M. Adan, and Nisar Majid. *Food and Power in Somalia: Business as Usual? A Scoping Study on the Political Economy of Food Following Shifts in Food Assistance and in Governance*. London: The London School of Economics and Political Science, 2020, 40.

NDP and sets targets to reduce stunting and wasting and improve child consumption of a minimum acceptable diet. The Somalia Social Protection Policy, drafted by the Ministry of Labor and Social Affairs, provides guidelines to strengthen social protection, reduce poverty and vulnerability, and build resilience.

Notably, there is significant competition between different levels of government and line ministries within Somalia. As such, coordination across government bodies is generally weak; aid agencies may be required to coordinate separately with federal, state, and district government bodies. Additionally, government control is often limited to urban areas and their immediate environs.

## **BILATERAL ACTORS**

USAID is a leading provider of aid in Somalia. USAID/BHA provided more than US\$755 million to NGOs and United Nations (UN) agency partners (including the World Food Program (WFP)) delivered emergency aid and around US\$5.8 million for early recovery, risk reduction, and resilience programming in fiscal year 2023. This funding supports the delivery of emergency food assistance, healthcare, nutrition, and water improvement programs.<sup>46</sup> USAID/BHA also supports WFP and other relief organizations to reduce food insecurity through cash transfers and US-sourced in-kind food aid.

The United Kingdom (UK) allocated around US\$112.5 million in aid to Somalia in FY 2023, of which 58 percent was distributed to humanitarian aid. The UK is also a major donor to the Building Resilient Communities in Somalia (BRCiS) consortium,<sup>47</sup> which seeks to build resilience among the most vulnerable and marginalized populations in Somalia and works in Afgoye, Baidoa, Banadir (Mogadishu), Hudur, and Kismayo and other areas outside of the AOI. Under BRCiS, a key program supported by the UK is Humanitarian Assistance and Resilience Building in Somalia (HARBS) which provides emergency assistance and supports resilience and durable solutions for IDPs. Additionally, in 2023, the UK partnered with King Salman Relief (KSRelief–Saudi Arabia) to respond to food insecurity.<sup>48</sup>

Germany, the European Commission, Sweden, and Denmark also provide substantial aid contributions to Somalia, many of which are channeled through UN agencies.

## **UNITED NATIONS AGENCIES**

The WFP, the primary distributor of food aid in Somalia, employs both cash-based transfers (CBT) and in-kind distribution. In 2022, WFP significantly increased its utilization of CBT, with distribution totaling US\$470 million, making it the largest CBT program executed by WFP worldwide in that year.<sup>49</sup>

The UN Food and Agriculture Organization (FAO) supports 76 projects within Somalia including emergency response, resilience, and development programming. Its activities center around improving food and nutrition security, protecting livelihoods, and strengthening the resilience of individuals and agrifood systems. Where possible, FAO utilizes market-based approaches to deliver assistance. FAO also supports the Food Security and Nutrition Analysis Unit (FSNAU) to provide data and information on food

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<sup>46</sup> United States Agency for International Development Bureau of Humanitarian Affairs (USAID/BHA). *Somalia Assistance Overview*. Washington, D.C.: USAID/BHA, 2023.

<sup>47</sup> BRCiS also receives funding from the European Union, World Bank, United States, and Qatar.

<sup>48</sup> United Kingdom Foreign, Commonwealth, and Development Office (FCDO). *UK-Somalia Development Partnership Summary, July 2023*. London: FCDO, 2023.

<sup>49</sup> World Food Program. *Food Market, Supply Situation and Market Functionality in Southern Somalia*. Rome: WFP, 2022.

security and nutrition and co-leads the Food Security Cluster in Somalia with WFP to coordinate relevant activities across a variety of NGO and UN partners.

In addition to these two agencies, the United Nations Development Program supports programs to mitigate the impacts of climate change, build resilience, and improve health and access to water and sanitation, among other initiatives. The United Nations Children's Fund (UNICEF) supports nutrition programs (especially child nutrition), health (including maternal and child health), and water and sanitation, among other areas. The UNHCR is the main UN body tasked with documenting and supporting IDPs; UNHCR and the International Organization for Migration (IOM) also co-lead the Camp Coordination and Camp Management Cluster which supports people affected by natural disasters and IDPs to live in safe, dignified, and appropriate settings.

### **OTHER NONGOVERNMENTAL ACTORS**

A large number of international and Somali NGOs operate in Somalia to implement programs in food security, nutrition, health, water and sanitation, resilience, IDP support, and other areas. For example, BRCIS is implemented by Action Against Hunger, Candlelight, Cesvi, Concern Worldwide, Gargaar Relief Development Organization, KAALO Aid, Norwegian Refugee Council, International Rescue Committee, and Save the Children. Other key NGOs with programming in relevant areas include Catholic Relief Services, Danish Refugee Council, Islamic Relief Worldwide, Mercy Corps, Oxfam, Relief International, Welthungerhilfe, and World Vision Somalia.

The private sector is a notable actor in Somalia; after the state collapse in 1991, the private sector took a leading role in the provision of many services, including water and healthcare. While the private sector has filled a crucial gap in state capacity, private service provision means that poor individuals are often excluded from accessing services.

### **CLAN ACTORS AND AL-SHABAAB**

Social networks and clan affiliations often influence access to food aid. Barriers to access are particularly salient in IDP settlements occupied by minority clan groups, as these groups rarely have networks (or share a clan) with individuals who can influence the distribution of food aid. These individuals, or “gatekeepers,” include IDP camp managers and are a key node in the distribution of humanitarian aid through their connections with IDPs, government officials, and NGOs.<sup>50</sup> Because aid beneficiaries must always be selected and registered, and because NGOs and aid workers may have limited knowledge about potential beneficiaries, gatekeepers can bias selection processes towards members of their (often more powerful) clan or social network.<sup>51</sup>

The terrorist group al-Shabaab also has a significant influence over the distribution of food aid and the functioning of food markets. Through the operation of checkpoints on major roads between cities (see *Food Availability* section) and within Mogadishu, al-Shabaab effectively taxes all food transported from southern seaports and between geographic locations in the AOI. This may include direct taxation of in-

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<sup>50</sup> See, e.g., Bakonyi, Jutta. “The Political Economy of Displacement: Rent Seeking, Disposessions and Precarious Mobility in Somali Cities.” *Global Policy* 12, no. S2 (2021): 10–22.

Bryld, Erik, Christine Kamau, Søren Knudsen Møller, and Mohamed A. Mohamoud. *Engaging the Gatekeepers: Using Informal Governance Resources in Mogadishu*. Copenhagen: Tana Copenhagen, 2017.

<sup>51</sup> For extensive discussion, see Wicaksono, Nicolas, and Tom King. *Political Economy Analysis to Inform Resilience and Food Security Activities*. West Lafayette, IN: LASER PULSE, 2024.

kind food aid, but checkpoints also have an indirect effect on aid distributed through cash transfers, as al-Shabaab taxes are in part paid by an increase in food prices.<sup>52</sup> NGO and aid worker access to some areas is also limited due to active al-Shabaab presence; within the AOI, the risk is particularly acute for Hudur, which lies in a district that is actively contested by al-Shabaab.

## FOOD AVAILABILITY

This section provides an overview of the market structure, conduct, and performance of essential commodities in the AOI. Despite Somalia's ongoing challenges related to food crop shortages, prevalent food insecurity, and acute malnutrition in the AOI, the local market system remains dynamic. It comprises many small markets and larger trading centers that respond to market signals. Furthermore, there is a significant level of integration among the markets in southern Somalia, including with primary markets in Mogadishu. Price patterns in the sampled markets reflect market characteristics, including transportation costs, the number of market participants, and entry and exit, and are influenced by variations in security conditions surrounding each market.

## SUPPLY CONTEXT

Somalia has long grappled with a chronic food crop deficiency, with local production only satisfying 22 percent of per capita cereal needs. Even during the most favorable agricultural seasons, domestic output covers only about 40–50 percent of per capita cereal requirements.<sup>53</sup> Irregular contributions of domestic cereals to the overall supply are attributed to consecutive seasons of rainfall failures, drought, and inefficient and deteriorating irrigation infrastructure. Conflicts and civil instability further undermine local cereal production. This persistent gap is typically bridged through the commercial imports of rice and wheat and the provision of food aid.

## DOMESTIC PRODUCTION OF COMMODITIES

Production of target commodities varies across the cities within the AOI, as outlined in Table 1.<sup>54</sup>

*Table 1: Crop Production Status in Southern Somalia*

City	Primary Crops and Proteins
Afgoye	<b>Crops:</b> The most cultivated crops are maize and beans, followed by sorghum and cowpeas. Sesame cultivation is rare, with concerns about theft. Rice is not part of the local crop landscape. <b>Proteins:</b> The dominant livestock are goats and sheep.
Baidoa	<b>Crops:</b> Sorghum is the primary crop grown in Baidoa, followed by maize, sesame, and cowpeas. Rice is not cultivated locally. <b>Proteins:</b> The most prevalent livestock are camels, goats, and sheep.
Hudur	<b>Crops:</b> The primary crops cultivated include sorghum, followed by maize, beans, and cowpeas. Sesame is not a common crop due to its demand for water and fertile soil. Rice is not grown. <b>Proteins:</b> Predominant livestock are camels, goats, and sheep.

<sup>52</sup> In economic terms, the incidence of al-Shabaab taxes falls at least in part on consumers.

<sup>53</sup> World Bank and FAO, 2018, viii.

<sup>54</sup> There is insufficient data to definitively distinguish between the crops and livestock produced by IDPs compared to those cultivated by host communities in each city.

City	Primary Crops and Proteins
Jowhar	<b>Crops:</b> The key crops are maize and cowpeas; farmers also plant sesame and rice. Sorghum is grown less frequently due to the threat of bird predation along riverbanks and unsuitable soil conditions. <b>Proteins:</b> The dominant livestock are goats. Fishing becomes a vital source of food and income during river floods.
Kismayo	<b>Crops:</b> The most cultivated crops are maize and cowpea, followed by sesame and sorghum. Rice is not cultivated locally. <b>Proteins:</b> The dominant livestock are goats and cattle, with some camels raised. Many households also fish.
Mogadishu	<b>Crops:</b> Farmers focus on the cultivation of maize and cowpeas, alongside sesame and sorghum. Rice is not grown. <b>Proteins:</b> The dominant livestock are goats and cattle. Camels are typically sold by wealthier households.

**Production of crops:** Data were collected for this assessment in September–October 2023, during the land preparation and planting season. In the surveyed host community households, 25 percent identified crop cultivation as a primary income source, whereas among the interviewed IDPs, only 22 percent cited crop cultivation as a main income source for their households. The prevalence of crop cultivation as one of the primary income sources exhibited substantial regional disparities (Figure 6).

Figure 6: Percentage of Respondents Identifying Crop Cultivation as a Primary Income Source

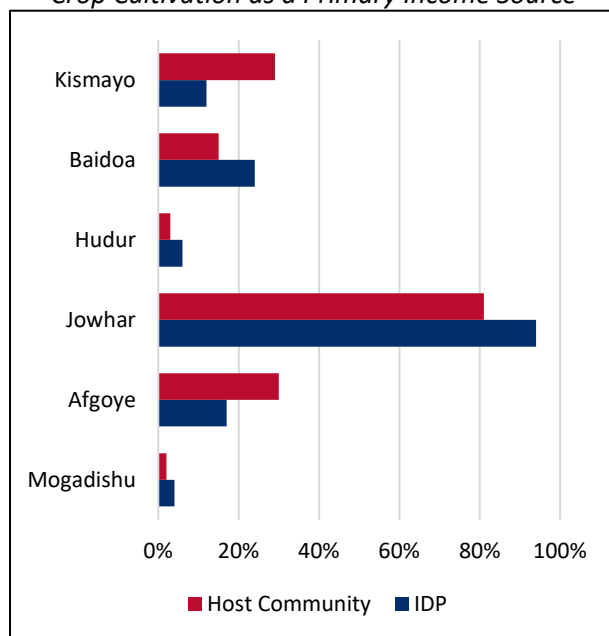
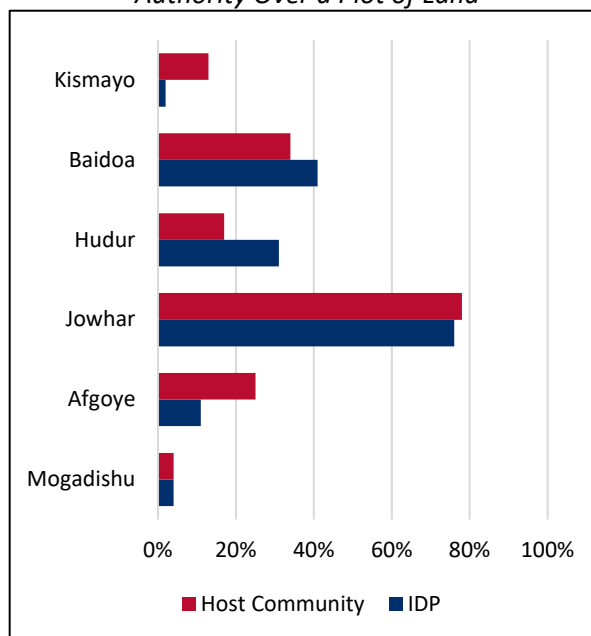


Figure 7: Percentage of Respondents Exerting Authority Over a Plot of Land



A quarter of interviewed households reported having control over a plot of land (27 percent of host community members and 24 percent of IDPs) allowing them to choose cultivation methods and make choices related to the harvest's storage, sale, or disposal. These percentages exhibited significant

variation across different cities, with limited representation in Mogadishu and significant representation in Jowhar (Figure 7). Among those with control over land, only 27 percent engaged in crop cultivation with the specific aim of generating income through sales or resale. Instead, many individuals in poverty utilize crop cultivation primarily to secure food, selling any surplus only if there is an excess after meeting family needs.

Among those who indicated they grew crops with the explicit aim of selling or reselling to generate income, the most commonly cultivated crops included maize, cowpeas, and sorghum. Notably, in Jowhar, 47 percent of such individuals mentioned rice cultivation as part of their income strategy.

When asked about the major issues encountered in crop production over the past year, 69 percent of respondents highlighted water scarcity as a prominent challenge. In addition, 58 percent mentioned concerns related to pests damaging their crops, while 27 percent cited problems associated with unpredictable weather conditions. Production challenges discussed by respondents or within the literature include:

- **Unstable weather:** This issue was predominantly reported by respondents in Afgoye and Jowhar, likely due to their proximity to the Shabelle River which experiences significant fluctuations, including droughts and floods.
- **Water scarcity:** This difficulty was cited by all respondents because of five consecutive failed rainy seasons in the region (before the 2023 *Gu* season).
- **Pest damage to crops:** A significant issue especially in Baidoa, Kismayo, and Afgoye, with fall armyworms and locusts among the most frequently cited pests.
- **Poor transportation:** Many farmers noted that rainfall results in muddy roads, leading to elevated transportation costs for agricultural inputs and products. Baidoa experiences this challenge more frequently, primarily due to the frequent blockages of roads connecting Baidoa to Mogadishu by al-Shabaab. Furthermore, there are over 10 checkpoints along the route from Mogadishu to Baidoa where either the government or al-Shabaab requires payments from vehicles, averaging US\$226<sup>55</sup> per checkpoint.<sup>56</sup>
- **Inability to access fertilizers:** This was a concern for 17 percent of respondents because of affordability issues, leading to a reliance on plowing to maintain soil fertility. In 2020, the Federal Ministry of Agriculture and Irrigation introduced a prohibition on the importation of fertilizers, citing concerns about their potential misuse by terrorist groups. This restriction on fertilizers led to an increase in prices, subsequently impacting the accessibility of fertilizers within the market, including at the level of agro-dealer shops.<sup>57</sup>
- **Lack of capital to purchase seeds:** This difficulty was reported by 6 percent of respondents, as most farmers rely on their seeds from previous harvests, which may be of lower quality. Typically, Somali farmers use farm-saved seeds, sustaining their seed stocks over time by

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<sup>55</sup> For a vehicle with a carrying capacity of 75 tons. This represents the standard carrying capacity for vehicles transporting goods along the specified route.

<sup>56</sup> Schouten, Peer. *Paying the Price: The Political Economy of Checkpoints in Somalia*. Nairobi, Kenya: Rift Valley Institute, 2022, 32.

<sup>57</sup> United Nations Food and Agriculture Organization (FAO). *Planting Material and Storage Inputs Assessment in Somalia*. Rome: FAO, 2023b, 89.

replenishing them with new seeds after each harvesting season.<sup>58</sup> This may cause lower-quality crops.

- **Access to credit:** This poses a formidable constraint for farmers due to stringent requirements to qualify for credit, including the need for collateral and guarantees from prominent business figures. This leaves many farmers without the necessary funds to invest in their farms. Farmers are often hesitant to borrow because of the uncertainties associated with agricultural activities.
- **Modern equipment:** Farmers also express concerns about farming equipment and irrigation tools. They highlight the cost-prohibitive nature of tractors and the potential for technological advancements to boost productivity. One farmer from Baidoa noted, “Most of the farmers use hand equipment as tractors are very expensive. Technologies would have improved farmers' productivity. With efficient equipment like cultivating machines, wells for irrigation, and high-quality seeds, we could farm better.”

**Production of livestock:** In the host community households surveyed, livestock rearing was identified as a primary income source by 8 percent, whereas among the interviewed IDPs, 7 percent cited livestock rearing as a main income source for their households. The prevalence of livestock rearing as a primary income source exhibited substantial regional disparities (Figure 8).

Figure 8: Percentage of Respondents Identifying Livestock Rearing as One of Their Primary Income Sources

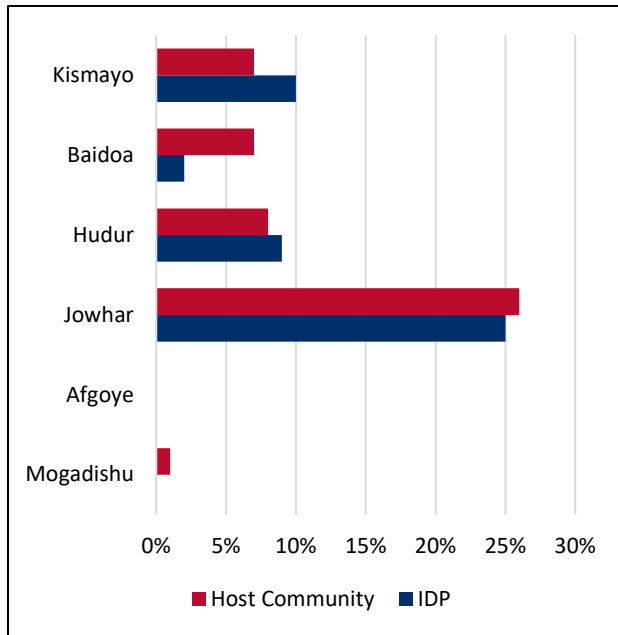
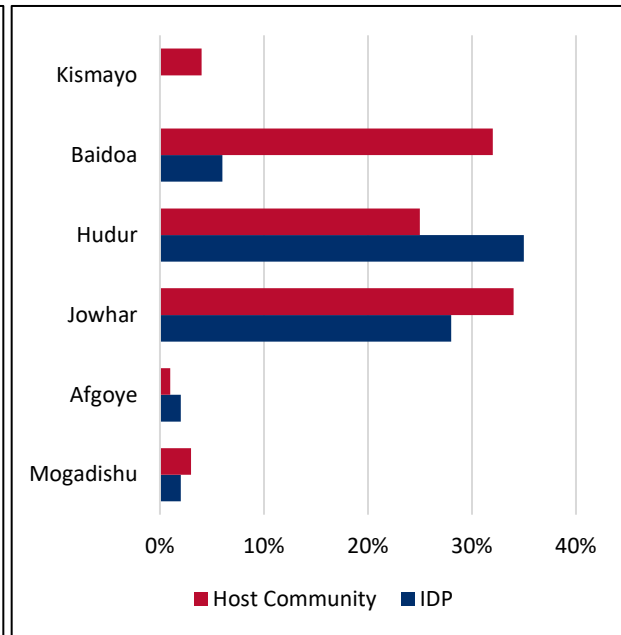


Figure 9: Percentage of Respondents with Decision-Making Authority over Livestock or Aquaculture Products



Only 12 percent of the households interviewed reported ownership of animals and/or aquaculture products. These percentages exhibited significant variation across different cities, with limited representation in Kismayo, Mogadishu, and Afgoye (Figure 9). Among those with the autonomy to decide about livestock management, only approximately 30 percent engaged in livestock rearing, with

<sup>58</sup> Ibid, 14.

the specific aim of generating income through sales or resale. Among those who indicated that they were rearing animals with the explicit aim of selling or reselling to generate income, the most commonly cultivated animals included goats, sheep, chickens, and cattle. Only 13 percent of respondents mentioned they were keeping camels for income generation.

When asked about the major issues encountered in livestock rearing over the past year, 75 percent of respondents highlighted livestock diseases as a prominent challenge. In addition, 65 percent mentioned concerns related to the lack of pasture, while 26 percent cited problems associated with the scarcity of water resources.

- **Livestock diseases:** Veterinary services are scarce, and the cost of veterinary drugs is prohibitive. Farmers often struggle to evaluate the quality of the drugs they purchase, leading to concerns about livestock health. Widespread dumping of expired, subpar, and counterfeit pharmaceuticals is a prevalent occurrence. The majority of livestock owners opt for drug suppliers with the most economical prices, bypassing veterinarians, community-based animal health workers, and agricultural veterinary stores.<sup>59</sup> Within the AOI, camel owners in Mogadishu and Baidoa reported a significant health issue known as ‘bap’<sup>60</sup> resulting in fatalities. Respondents in Afgoye and Jowhar cited the significant impact of goat and camel pox in the past year.
- **Lack of pasture:** Prolonged drought conditions have accelerated rangeland depletion, resulting in reduced access to and increased conflicts over grazing land. Livestock owners are frequently compelled to engage in migrations with their animals to locate more suitable grazing areas. This often leads to competition for the limited green pastures and cultivable lands with individuals involved in cultivation, resulting in frequent tensions and conflicts.<sup>61</sup>
- **Scarcity of water resources:** Extended drought has severely limited available water resources for livestock. A shortage of non-surface water sources exacerbates the problem. Most farmers expressed concerns about the scarcity of water for their livestock. The adverse impact of factors such as drought and reduced river levels leads to losses in livestock, compelling some communities to migrate to other regions with their remaining livestock while others seek refuge in urban areas with their relatives.

**Fisheries:** Many rural residents, including pastoralists, rely on fishing as a seasonal, part-time activity to supplement their household’s diets and income. Fishing activity ceases along most of Somalia’s Indian Ocean coastline during the months of the strong southwest monsoon winds (June-Aug), prompting coastal communities to shift back to pastoralism.<sup>62</sup>

Southern Somalia hosts two major fishing ports: one in Mogadishu and the other in Kismayo. Given the substantial population of Mogadishu, fish caught in the city is predominantly distributed and sold locally. In Kismayo, efforts to train a workforce, primarily originating from agricultural and pastoral areas and including IDPs, in fishing practices have encountered limited success. Security challenges that impede

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<sup>59</sup> World Bank and FAO, 2018, 56.

<sup>60</sup> Brucellosis.

<sup>61</sup> United Nations Women and Horn of Africa Consultants Firm. *Gender, Climate and Conflict Analysis in Somalia and Assessment of Opportunities for Climate Agriculture and Livelihood Opportunities for Crisis-affected and At-risk Women in Somalia*. Mogadishu, Somalia: UN Women, 2022, 3.

<sup>62</sup> World Bank, 2018, 113.



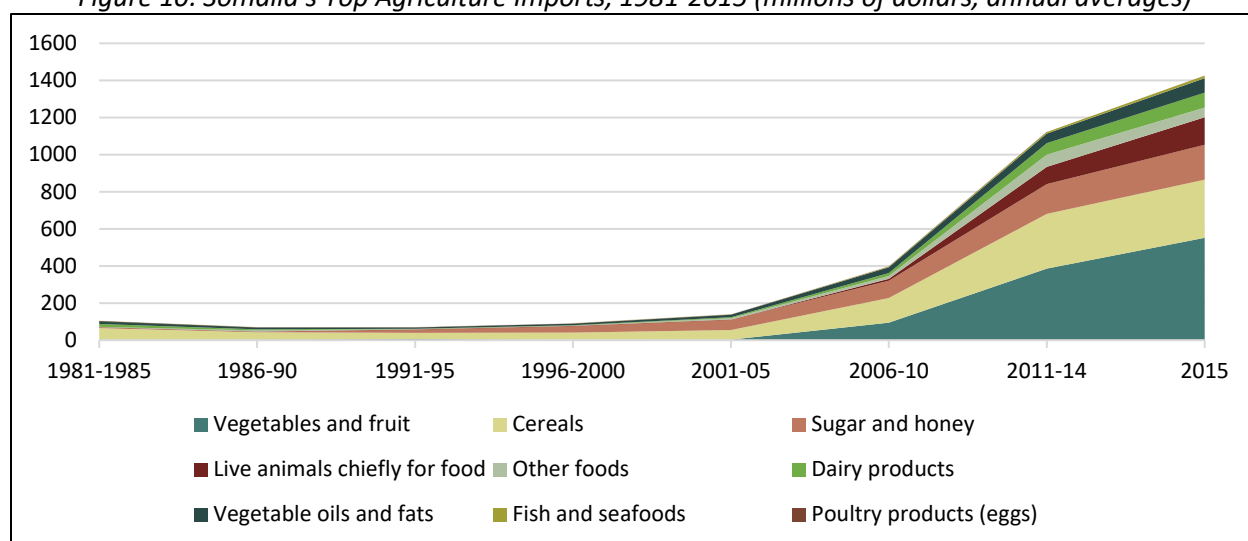
access to fish markets in Kenya for exports contribute to the overall reduction in fishing activities. Several prominent obstacles exacerbate the situation, including the absence or poor functionality of cold-chain facilities, insufficient fish landing infrastructure at major ports, limited processing enterprises, and deficient transportation links between major urban centers and isolated fishing communities along the coastline. Many of these coastal communities continue to rely on trade with Yemeni vessels for their economic sustenance.<sup>63</sup>

Out of the household survey participants, only 4 percent reported involvement in fish production in the past year, with all these respondents hailing from Jowhar. Recent river flooding in Jowhar has driven a notable increase in fish consumption, as the community seizes fishing opportunities during flood periods resulting in a surplus of affordable protein from fish.

**IMPORT DYNAMICS**

Since the late 1980s, agricultural imports in Somalia have experienced a significant surge, marking an eighteen-fold increase as of the early 2020s.<sup>64</sup> This surge is attributed to heightened domestic food demand fueled by rapid population growth, urbanization, and substantial remittance support, coupled with the collapse of domestic crop production.<sup>65</sup> The heightened reliance on imports renders Somalia susceptible to international shocks impacting import prices. A recent example is the Ukrainian conflict, which substantially disrupted the supply of imported grains in Somalia as over 90 percent of grains were sourced from Ukraine and Russia.

*Figure 10: Somalia’s Top Agriculture Imports, 1981-2015 (millions of dollars, annual averages)*



Source: World Bank, 2023

Figure 10 outlines some primary agricultural imports in Somalia, encompassing vegetables, fruits, cereals, sugar, and live animals, primarily for food consumption. The nation has experienced substantial growth in cereal imports, witnessing an eightfold increase since the late 1990s. Overall, the value of food imports soared fourteen times to US\$1.17 billion in 2020, a substantial increase from the late

<sup>63</sup> Ibid, xiii.

<sup>64</sup> African Union. *Dakar 2 Somalia. Country Food and Agriculture Delivery Compact*. Dakar: African Union, 2023, 1.

<sup>65</sup> World Bank, 2018, 28.

1980s yearly average of approximately US\$82 million. Despite this significant expansion, it is noteworthy that cereal imports, predominantly comprising rice and wheat flour, still account for approximately 60–70 percent of Somalia’s overall food needs.<sup>66</sup> This underscores the persistent reliance on imported cereals to meet a substantial portion of the country’s dietary requirements.

Imported goods predominantly flow through Mogadishu which also functions as a gateway for exports; Bossaso and Berbera are also key ports. A considerable proportion of importers primarily focus on trading staples like sugar and rice. Some diversify their operations by engaging in both wholesale and retail activities to enhance turnover. An evaluation by WFP indicates a notable concentration of sellers at the import level in the supply chain. Data reveals that the five largest importers collectively control over 45 percent of the market share across the ports Bossaso, Mogadishu, and Berbera.

Transactional arrangements in this domain fall into three categories: (1) importers source commodities from international markets and distribute them through an established network of wholesalers and retailers in Somalia and neighboring countries; (2) importers secure supplies and selectively distribute them to designated Somali wholesalers based on pre-existing agreements; and (3) importers directly sell their goods to other traders within Somalia, operating as either wholesalers or retailers, following a first-come-first-served basis.<sup>67</sup> These import market dynamics are stable; existing importers have well-established networks and relationships with international suppliers, wholesalers, and retailers, making it challenging for new entrants to break into the market. The dominance of a few large importers creates barriers to entry for potential competitors. Similarly, the transactional arrangements listed above meet the needs of both importers and the supply chain, providing little incentive for significant changes.

## MARKET CHARACTERISTICS

**Market oversight:** The government primarily issues licensing permits but refrains from significant intervention in market dynamics. Local district authorities shoulder the responsibility of market oversight, with a strong emphasis on providing licensing and permits. When asked about the influence of market authorities on price determination, over 85 percent of respondents confirmed the limited role of the government in this aspect.

**Market organization:** Market organization exhibits a spatial arrangement wherein vendors of agricultural crops are co-located, distinct from vendors specializing in livestock who are also grouped together. It is not uncommon for livestock sellers to have dedicated markets exclusively for their trade. In these specialized markets, livestock are the sole commodity transacted, fostering a distinct separation between the trading of agricultural produce and livestock. This spatial segregation within markets aims to streamline transactions and enhance efficiency by clustering similar types of commodities, facilitating a more organized and coherent trading environment.

**Entry and exit:** Respondents consistently asserted the absence of formal barriers to entry/exit, extending inclusivity even to marginalized groups. Government officials asserted business permits are available to all individuals capable of purchasing them, with no discriminatory practices based on clan or gender. A female business owner in Mogadishu highlighted the accessibility of the market for marginalized groups, stating, “Most retailers in the market are IDPs, allowing easy market access. Even

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<sup>66</sup> African Union, 2023, 1.

<sup>67</sup> WFP. *Food Market and Supply Situation in Southern Somalia*. Rome: WFP, 2011, 9.

poor individuals with limited resources can participate by selling small quantities of vegetables.”<sup>68</sup> However, despite these assertions, underlying challenges persist. For instance, IDPs often reside at a greater distance from the market compared to members of the host community. According to the household survey, IDPs, on average, had to travel 2.4 km to reach the market, while host community members covered just 1.6 km. Given the greater distance, IDPs are likely to incur higher transportation costs. Additionally, individuals from minority clans and IDPs typically possess fewer economic resources than their host community and majority clan counterparts, making it comparatively more challenging for them to establish market-based businesses. Although women actively participate in small-scale trading, ownership of wholesale businesses or major corporations remains rare among them, and few Somali companies have women represented on their boards.<sup>69</sup>

**Vendor types:** According to the respondents, the most active market participants are wholesale buyers and suppliers, retailers, and independent farmers.

*Table 2: Vendor Types by AOI*

City	Vendor Types
Afgoye	Wholesalers, equipped with multiple vehicles for product delivery, are prominent in the market and retailers conduct sales throughout the week. They operate independently or collaborate with larger stores to obtain products for resale and profit generation.
Baidoa	Some traders in markets operate as wholesalers, working consistently every day of the week. Retailers in the market are similarly active, engaging in trade daily. The prevailing market participants in the Bay and Bakool regions consist mainly of small-scale traders and microenterprises. Women, especially in milk and grain retail, take on a predominant role in petty trade. <sup>70</sup>
Hudur	Markets feature a mix of small-scale businesses and major suppliers. Retailers are also a prominent presence, consistently involved in market activities.
Jowhar	Markets include both retailers selling crops locally and wholesalers transporting various food crops and fruits to markets in Mogadishu, Jalalaqsi, and Galkayo. Sellers are present every day but Saturdays are significant as the day when rural producers bring their goods to the market.
Kismayo	Markets are vibrant with active retail sellers, including grocery shops. Wholesalers are also prevalent. The market functions as a hub where farmers sell crops, wholesalers make purchases, and retailers sell goods to consumers. Wholesalers and retailers operate six days a week, resting on Fridays.
Mogadishu	In smaller markets, there is a notable absence of wholesalers. Retailers are engaged in the market, mostly conducting trade on nonconsecutive days, with some opting to trade every day.

Within the livestock subsector, most activities related to camels, as well as the principal livestock trade for export, are undertaken by men and boys. Conversely, women primarily assume the responsibilities

<sup>68</sup> KII with a business owner, Mogadishu

<sup>69</sup> International Labour Organization (ILO). *Sectoral Assessment of Women’s Entrepreneurship Development in the Agriculture and Renewable Energy Sectors in Somalia*. Geneva, Switzerland: International Labour Organization, 2020, 18.

<sup>70</sup> Springer, Joanna, Tracy Slaybaugh-Mitchell, Guhad Adan, and Alison Bean de Hernandez. “Comparative Resilience of Somali Grain and Livestock Market Systems.” *Enterprise Development and Microfinance* 33, no. 1 (2022): 12-27.

of raising and tending to sheep and goats. Women's involvement in livestock trading and marketing is localized, predominantly focused on shoats, and often operates at a subsistence level. The sale and processing of various livestock products, encompassing meat, camel milk, ghee, soaps, and jewelry crafted from bones, are typically overseen by women.<sup>71</sup> Notably, while camel milk production is predominantly within the domain of men, cow milk production and marketing are largely dominated by women.

In the crop subsector, responsibilities related to crop cultivation are shared between Somali men and women, particularly in subsistence farming, where women contribute over 60 percent of the labor.<sup>72</sup> While women are generally not as extensively involved in land cultivation and planting, their participation is more pronounced in activities like weeding, harvesting, caring for harvested crops, and engaging in small-scale trading. Notably, in the sesame value chain, women take a prominent role in the transformation process, encompassing activities such as cleaning, salting, and drying. Additionally, women traditionally hold a predominant presence in small-scale sesame trading and participate in oil-processing cooperatives.<sup>73</sup>

**Constraints on increasing market capacity:** Vendors face multiple challenges in trying to meet growing demand and cater to an expanding customer base. Predominant issues include limited access to capital and credit (reported by 50 percent of surveyed market vendors), inadequate storage facilities (31 percent), transportation challenges (21 percent), competition from large players (21 percent), insufficient production resources such as land and labor which limit the supply of commodities and increase reliance on a small number of suppliers (23 percent), and high input costs (21 percent). These challenges exhibit variations across different cities, with Mogadishu, Jowhar, and Kismayo highlighting access to capital as a primary concern, Afgoye grappling with market instability, Baidoa facing a shortage of storage facilities, and Hudur contending with insufficient production resources.

Storage capacity remains a recurring challenge for vendors, with nearly half reporting their existing storage space falls short each year. Given the typically high costs associated with conventional storage facilities, vendors adopt a pragmatic approach by opting for collaborative storage arrangements. This strategy allows them to optimize resources, mitigate financial burdens, and address the perennial issue of inadequate storage space in a more cost-efficient manner.

Transportation hurdles complicate the movement of products for most vendors, who rely on foot, bicycles, motorcycles, or animal-drawn carts. Challenges associated with transportation are compounded by factors such as unaffordable transportation costs (41 percent), lack of reliable roads and pathways (40 percent), and security concerns (34 percent).

Price fluctuations were also cited as a challenge for crop and livestock vendors. Respondents expressed the challenge of having to sell their produce at lower-than-anticipated prices due to market volatility. For instance, one respondent shared a scenario where the expected selling price for 1kg of maize was 6,000 shillings the previous day, but upon bringing the maize to market, they discovered the price had

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<sup>71</sup> World Bank and FAO, 2018, 31.

<sup>72</sup> Ibid, 31-2.

<sup>73</sup> Ministry of Planning, Investment and Economic Development. Somalia National Development Plan. 2020 to 2024. Mogadishu, Somalia: Ministry of Planning, Investment and Economic Development, 2020, 200.

dropped to 5,500 shillings. The dilemma faced by farmers is compounded by the impracticality of waiting for more favorable prices because of a lack of access to storage.

**Market resilience:** The grain market system, where women have a prominent role, is more resilient than the livestock market system. Grain businesses show greater adaptive capacity in recovering from shocks, but producers are price takers. To enhance resilience, addressing unequal power dynamics, and institutional obstacles to women's economic empowerment, and promoting inclusive cooperation are crucial. Emphasis should be placed on market functions for smallholder producers, including storage capacity, access to finance, and inputs, particularly to support climate-smart practices.<sup>74</sup>

### MARKET INTEGRATION

Approximately 80 percent of the region's agricultural land is under the control of al-Shabaab, creating obstacles for rural-urban market connections. Despite this challenge and the absence of comprehensive formal economic institutions across the entire region, Southern Somalia's markets exhibit relative integration and equilibrium across distances and internal borders. Market relationships, as evidenced by correlation coefficients between prices (see Table 3), demonstrate effective integration among domestic staple food commodity markets in Southern Somalia.<sup>75</sup> The correlation coefficients illustrate how prices of maize and rice across different locations within Southern Somalia move in relation to each other. Higher correlation coefficients suggest a stronger connection between market prices. In this context, the relatively high correlation coefficients observed in Baidoa, Mogadishu, and Kismayo indicate a more robust integration of these markets. These areas seem to share common economic trends and respond similarly to market forces. Conversely, the lower correlation coefficients involving Hudur suggest a comparatively weaker integration with other markets in the region. The challenges faced by Hudur (which is often under siege) likely contribute to disruptions in market connectivity.<sup>76</sup>

Table 3: Coefficients of Correlation of Maize and Rice Prices

	Maize Prices				Rice Prices			
	Mogadishu	Baidoa	Hudur	Kismayo	Mogadishu	Baidoa	Hudur	Kismayo
Mogadishu	1.00				1.00			
Baidoa	0.81**	1.00			0.87**	1.00		
Hudur	0.64**	0.66**	1.00		0.33**	0.47**	1.00	
Kismayo	0.78**	0.78**	0.70**	1.00	0.88**	0.89**	0.44**	1.00

\*\* Correlation is significant at the 0.01 level

Source: WFP, 2022, 6

Although periods of armed conflict disrupt commerce it does not entirely hinder the price transmission of commodities, including imported rice and locally produced maize and sorghum. Remarkably high market integration, as shown by substantial price transmission between cities for the same commodity, suggests alternative mechanisms enabling traders in different cities to conduct transactions, establish and enforce contracts, share information, and resolve disputes. This phenomenon may be attributed to the emergence of informal institutions, thriving in the aftermath of the collapse of centralized political authority, fostering trust, information exchange, and contract enforcement among Somalis. These

<sup>74</sup> Springer et al., 2022, 26.

<sup>75</sup> WFP, 2022, 6.

<sup>76</sup> Data is not available for Afgoye and Jowhar.

informal networks facilitate business activities across barriers that impede the flow of information, goods, and people between markets.<sup>77</sup>

### MARKET PRICES

Understanding price variability is key to providing insight into price dynamics within the AOI. Price fluctuations can stem from factors including natural elements like weather variability or economic factors such as market structure (i.e., transport expenses, the number of market participants, and the length of different marketing channels). In the case of Somalia, in addition to these factors, price variability, and, in a broader sense, market operations are significantly influenced by an exceedingly unstable security environment. Markets within the AOI are scattered across vast distances, spanning areas characterized by differing levels of physical security, economic performance, natural resource availability, climatic severity, and drought risk. Each of these elements exerts varying degrees of influence on price variability.

Table 4 presents crop prices in harvest and lean seasons, all of which are converted into the US dollar for enhanced comparability. The substantial price differential between rice and sorghum/maize can be attributed to the former being primarily imported, whereas sorghum and maize are predominantly locally produced. Rice prices are consistently high across Somalia. Interestingly, the lowest prices are observed in Baidoa. This phenomenon might be elucidated by the shift in port preferences since 2018. Before this, Mogadishu held the favored status; however, with the regime change in Ethiopia, Bossaso and Berbera have gained popularity. The new leadership in the Somali regions of Ethiopia has eased trade restrictions, opening up a nearly checkpoint-free route through Ethiopia, resulting in significant reductions in transportation costs. This has rendered it more cost-effective for traders in Baidoa to source goods from these more distant ports than to procure items in Mogadishu.<sup>78</sup>

*Table 4: Average Crop Prices in AOI, September–October 2023*

Location	Harvest Season					Lean Season				
	Sorghum price/kg	Sesame price/kg	Cowpea price/kg	Maize price/kg	Rice price/kg	Sorghum price/kg	Sesame price/kg	Cowpea price/kg	Maize price/kg	Rice price/kg
Mogadishu	\$0.50	\$1.63	\$1.17	\$0.63	\$1.13	\$0.67	\$1.88	\$1.46	\$0.90	\$1.34
Afgoye	\$0.63	\$2.38	\$1.13	\$0.50	\$1.04	\$0.75	\$2.50	\$1.42	\$0.72	\$1.13
Jowhar	\$0.21	\$1.08	\$0.71	\$0.27	\$1.17	\$0.42	\$2.08	\$1.08	\$0.63	\$1.46
Hudur	\$0.63	\$1.46	\$1.25	\$0.96	\$1.04	\$0.50	\$1.04	\$1.04	\$0.75	\$0.83
Baidoa	\$0.33	\$1.04	\$0.63	\$0.42	\$0.67	\$0.63	\$1.25	\$1.17	\$0.67	\$0.75
Kismayo	\$1.00	\$0.92	\$1.13	\$0.63	\$0.92	\$0.71	\$0.83	\$1.13	\$0.50	\$0.98

*Note: The colors of individual cells in the table represent the price within the cell relative to other prices within the table, where dark red is the highest price and dark green is the lowest price.*

Sesame prices are notably influenced by the international market, and local sesame production is highly responsive to market price fluctuations. Sesame seeds represent a significant export in Somalia, and the

<sup>77</sup> Hastings, Justin V., Sarah G. Phillips, David Ubilava, and Andrey Vasnev. "Price Transmission in Conflict-Affected States: Evidence from Cereal Markets of Somalia." *Journal of African Economies* 31, no. 3 (2022): 272-91.

<sup>78</sup> Ali, Abdurahman. *Brokering Trade Routes: The Political Economy of Checkpoints along Somalia's Baidoa Corridor*. Nairobi, Kenya: Rift Valley Institute, 2021, 36.

recent drought-related impact on local seed supply has contributed to increased prices. In comparison to sorghum and maize, cowpea is cultivated less frequently, resulting in higher prices for cowpeas in contrast to the prices of sorghum and maize.

Crop prices tend to be elevated during lean seasons compared to harvest seasons across all cities, except for Hudur and Kismayo (see Table 4). In the case of Hudur, its status as a town under “siege” surrounded by armed forces, as well as the heightened vulnerability of residents during lean seasons, likely contributed to the inability to afford crops at higher prices. Conversely, Kismayo experiences lower prices during the lean season, possibly attributable to enhanced humanitarian access and food distribution initiatives typically occurring during this period.

Table 5 provides statistics on livestock prices, with all values converted to US dollars. In livestock markets, the value of animals typically corresponds to their physical condition, sex, age, and size. However, the unpredictable security situation, particularly evident in cities like Hudur, introduces fluctuations in market prices. Due to restricted market access for livestock owners, who cannot reach markets beyond the town, they are compelled to sell their livestock at reduced prices within the town, driven by the relatively limited purchasing power of the local population.

When examining the variations in livestock prices between lean and harvest seasons, a distinct pattern emerges. Livestock prices increase during the lean season in only two cities, Mogadishu and Baidoa. Conversely, in Afgoye, Jowhar, Hudur, and Kismayo, livestock prices are lower during the harvest season compared to the lean season. This divergence in pricing dynamics could be attributed to the potentially more inelastic demand for livestock in larger cities like Mogadishu and Baidoa, where consumers likely possess greater purchasing power than their counterparts in relatively smaller cities.

*Table 5: Average Livestock Prices in AOI, September–October 2023*

Location	Harvest Season				Lean Season			
	Camel price/adult female	Goat price/adult female	Sheep price/adult female	Fish price/kg	Camel price/adult female	Goat price/adult female	Sheep price/adult female	Fish price/kg
Mogadishu	\$1625.00	\$96.00	\$125.00	\$3.13	\$1704.00	\$143.75	\$175.00	\$4.60
Afgoye	\$1229.00	\$94.50	\$109.13	-	\$854.00	\$60.75	\$79.31	-
Jowhar	\$1083.00	\$52.08	\$66.67	\$0.42	\$1042.00	\$41.68	\$54.17	\$1.08
Hudur	\$604.00	\$41.68	\$41.67	\$5.52	\$500.00	\$37.50	\$33.33	-
Baidoa	\$666.00	\$62.50	\$75.00	-	\$1042.00	\$83.33	\$106.25	-
Kismayo	\$542.00	\$68.75	\$89.58	\$5.63	\$479.00	\$54.17	\$66.67	\$2.81

*Note: The colors of individual cells in the table represent the price within the cell relative to other prices within the table, where dark red is the highest price and dark green is the lowest price.*

**Price setting and price discovery:** When inquired about their pricing strategies, 55 percent of respondents indicated their reliance on local market prices as the primary determinant. Meanwhile, 16 percent disclosed that they gather pricing information from fellow traders, and 12 percent reported engaging in negotiations with buyers to establish their selling prices.

**Reactivity to market signals and shocks:** Regarding the factors contributing to price increases, respondents highlighted various elements; 64 percent stated that price increases could occur due to heightened demand from buyers, while 50 percent identified decreased supply resulting from unexpected shocks and seasonal trends as a driving force. Additionally, 26 percent pointed to market speculation, and 23 percent cited elevated transportation costs as factors necessitating price hikes. Responses varied across the AOI. For instance, in Mogadishu and Afgoye, 24 percent and 27 percent of vendors, respectively, cited rising input costs as a leading cause of price increments. Conversely, nearly half of the respondents in Baidoa emphasized transportation costs as a primary driver for price increases.

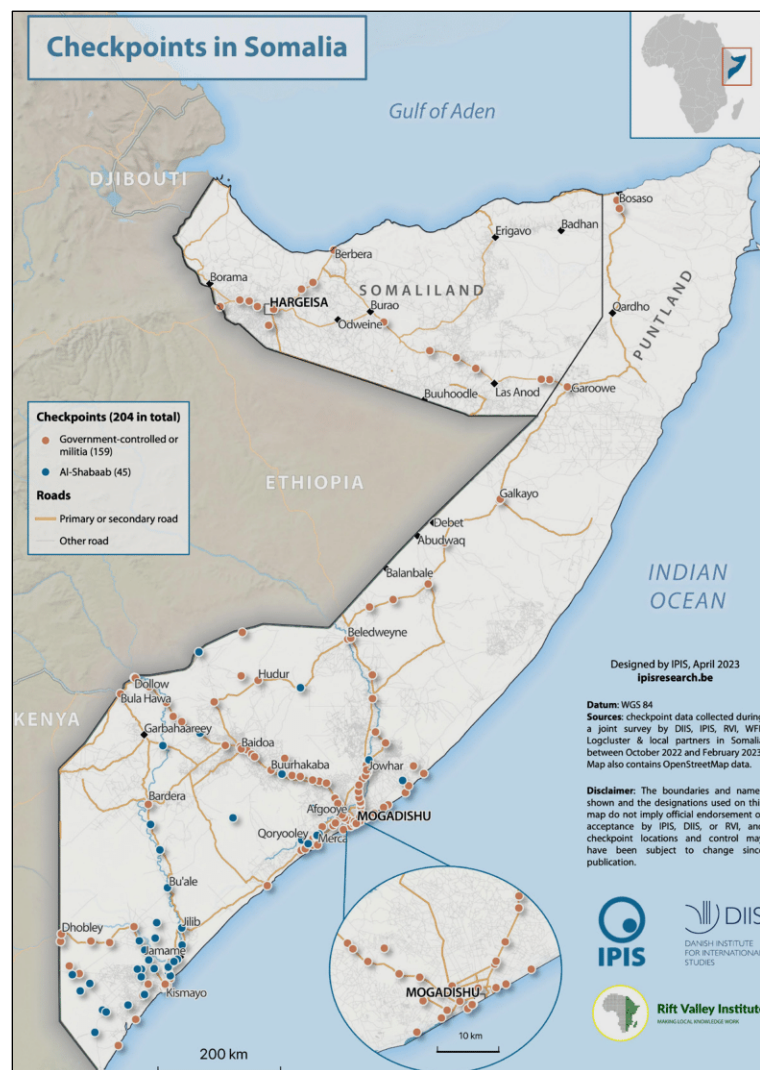
When asked about their response if suppliers raised the prices of their produce, 52 percent of respondents indicated a straightforward approach of directly reflecting the increased purchase cost in their new pricing. Meanwhile, 18 percent expressed their intention to monitor closely local market trends, and 11 percent outlined a strategy involving factoring in transportation and handling expenses, coupled with negotiations with buyers to offset these additional costs.

**INFRASTRUCTURE AND IMPACT ON MARKETS**

**Roads and transportation infrastructure:**

Many roads in Somalia are in poor condition; some paved roads constructed before state collapse in 1991 were already in poor condition, undergoing reconstruction, or in need of substantial repairs before state collapse. The Mogadishu–Baidoa–Dollow road, which connects to the main road in Mandera and Elwak, Kenya, is comprised of worn-out asphalt and was constructed during the Italian colonial era. Most other paved roads in southern Somalia, including those linking Mogadishu to Middle Shabelle (Jowhar), Hiran (Beletweyn), and Mudug (Galkayo), have severely deteriorated due to a lack of maintenance. Additionally, the vertisol

Figure 11: Main Roads and Checkpoints in Somalia



Source: Schouten, 2023



soil in these regions leads to cracks in paved roads.<sup>79</sup>

In the southern regions, major and minor gravel roads, including farm access roads, have deteriorated to the point of being impassable during the rainy season. Even in dry periods, travel on these roads can take long periods, leading to spoilage of produce en route to major markets. In 2016, it was estimated that only 31 percent of the rural population in Somalia resides within 2km of a paved road.<sup>80</sup>

Furthermore, illegal road taxation by both al-Shabaab and militia groups in government uniforms at various checkpoints, along with high government taxation along roads and at ports, pose significant challenges for producers. “We pay two taxes: the government's official tax and the illegal tax that government soldiers collect from the drivers of transportation vehicles to reach the market.”<sup>81</sup>

**Seaports:** Somalia’s four major seaports (Mogadishu, Berbera, Kismayo, and Bossaso) are operational, albeit with some deterioration in the operations of Mogadishu and Kismayo ports due to a lack of maintenance. The ports have limited capacity and basic facilities. Most livestock exports go through the northern ports of Bossaso and Berbera, while agricultural produce is primarily exported through the port of Mogadishu.

**Fisheries infrastructure:** There is intermittent ice production in Mogadishu, facilitating the distribution of fresh fish to wider markets. In Kismayo, there is some ice production, but cold-chain infrastructure has heavily deteriorated. Somalia's artisanal fishing fleet predominantly consists of small boats, primarily constructed locally using older designs and typically launched from the beach. In the mid-2000s, the fleet's extent was approximated, revealing the presence of approximately 650 motorized fiberglass vessels measuring 6 to 9 meters, 380 traditional sailboats, and 800 *houris* or canoes measuring 5 meters in length. This estimation suggests that, in the present day, there might be an aggregate of around 2,000 vessels of diverse types operating within the artisanal fishing sector.<sup>82</sup>

**Telecommunications:** The widespread availability of mobile phone services in Somalia enables pastoral, agro-pastoral, agriculture, and fishing communities far from major urban centers to maintain contact with dispersed family members and access information, including market prices. Modern telecommunications empower these communities to communicate directly with major markets, aiding their decisions about selling products and purchasing inputs and supplies.

**Storage:** The storage of crops is primarily managed through community warehouses or home storage. Traditional methods, such as using *Bakaar* or containers, are prevalent for storing crops. Livestock, on the other hand, typically returns to grazing lands immediately after market hours. During market periods, livestock is housed under market shades for containment.

## FOOD AID MODALITIES

Over the past 15 years, Somalia has transitioned from in-kind food assistance to cash transfers and vouchers, which has been viewed positively by researchers and beneficiaries. Research has found that this shift provides beneficiaries with more choices, enhances food access and dietary diversity, and

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<sup>79</sup> World Bank and FAO, 2018, 24.

<sup>80</sup> Kularatne, Butt, and Calo, 2022, 16.

<sup>81</sup> FGD with agricultural organization members, Jowhar

<sup>82</sup> World Bank and FAO, 2018, 114

stimulates local markets and trade.<sup>83</sup> The Graduation Approach is likely to complement these food aid modalities by providing not just consumption support and cash transfers, but a holistic set of interventions to reduce reliance on food aid.

In Somalia, mobile money transfers have gained popularity as a prevalent form of cash transfer. Payments are directly delivered to mobile phones, most often through the Hormuud network, offering flexibility in utilization. Recipients can transfer the digital cash to various merchant shops, exchanging it for essential household goods like food, water, and non-food items, or convert it into hard currency.<sup>84</sup> Despite widespread adoption, some district administrators have reservations about mobile money transfers, and they prefer food vouchers. They express concerns about community members, particularly those who are illiterate or visually impaired, facing difficulties with mobile money services. Food vouchers are considered a more accessible and secure option, enabling individuals to acquire their preferred food items from local stores.

On the contrary, some IDPs have concerns about food vouchers and direct food distribution. They fear that gatekeepers or camp authorities may demand a share of the aid. Instead, they prefer receiving mobile cash transfers, which they perceive as a more equitable option that offers flexibility for settling debts and discreetly acquiring other necessary items.

Regarding food aid modalities, many IDPs express a desire for food assistance during the lean season and cash support during other periods, allowing them to invest in farming activities. The preferred food items mentioned by respondents are rice, pasta, cooking oil, flour, sugar, and milk.

Some district administrators expressed reservations about the distribution of in-kind food aid, particularly during harvest seasons, fearing potential adverse effects on prices for locally grown produce.<sup>85</sup> Instead, they emphasize the importance of continued cash support for the community's essential needs, such as seeds, food, and materials. "I suggest that humanitarian support should be stopped during the harvesting seasons to encourage local farmers' production and profitability. However, cash support remains crucial for the community, as it enables them to purchase necessities such as seeds, food, and materials. There is also a downside where some farmers have ceased agricultural activities because they believe they can receive humanitarian assistance in town."<sup>86</sup> This issue is also discussed by many respondents in focus group discussions. "Of course, the only negative impact food has on the local farmers is that food aid is usually provided right during the harvest, and it gives headaches to the farmers because the food crops they produced will be sold at a very low price."<sup>87</sup>

When vendors were asked about the positive effects of food aid on their communities, 39 percent mentioned enhanced livelihoods for beneficiaries, 23 percent noted improved market demand, and 21 percent highlighted a boosted local economy. Responses varied by city. For instance, 13 percent of respondents in Mogadishu and 24 percent in Jowhar mentioned improved price stability, while over half of the respondents in Afgoye reported no aid effects, as they have not been receiving aid at all. In

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<sup>83</sup> Jaspars et al., 2020, 10.

<sup>84</sup> Somali Cash Consortium. *Launch of €6.5m Mobile Money Cash Transfer Program*. Mogadishu: Somali Cash Consortium, 2021.

<sup>85</sup> See also Jaspars et al., 2020.

<sup>86</sup> KII with district administrator, Baidoa

<sup>87</sup> FGD with host community members, Jowhar

Hudur, 39 percent mentioned an expanded customer base, while in Baidoa and Kismayo, 25 percent and 7 percent of respondents, respectively, mentioned enhanced social interactions.

When asked about the negative effects of food aid commodity distribution, 41 percent mentioned decreased market demand, 30 percent referred to reduced market sales, and 28 percent cited price volatility. In different cities, vendors also raised distinct concerns. For example, in Baidoa and Hudur, vendors emphasized lower profits, with 47 percent and 67 percent mentioning this issue, respectively. In Jowhar, one-fifth of vendors stated that food aid distribution leads to disincentives for local production, while in Mogadishu, 22 percent of vendors mentioned decreased livelihoods due to food aid distribution. Overall, traders generally favor cash transfers over in-kind food aid distribution, with 43 percent of traders noting that in-kind food aid distribution negatively affects their business.

## FOOD ACCESS

This section provides an overview of the typical food basket of individuals in Southern Somalia, discusses avenues to obtaining food, and delves into the determinants affecting market access and food acquisition.

### FOOD BASKET PROFILE

Maize, sorghum, cowpea, and rice are all key staples in Southern Somalia. However, while maize and sorghum are more popular in agricultural areas, rice is heavily dominant in urban areas. Cowpea is essential in all households.<sup>88</sup> In terms of livestock, camel meat, and goat meat are favored protein sources, although their relatively higher prices compared to other foods render them inaccessible for many impoverished households.

Respondents interviewed during the household survey reported on the food<sup>89</sup> their households consumed during the last seven days before the survey.<sup>90</sup> Among households in the sampled cities, the most common food group were cereals like sorghum, maize, rice, or wheat (97.9 percent), followed by sugar (89.3 percent) oils, fats, and related food items (84.7 percent). City-specific distributions are detailed in Table 6. Respondents from Jowhar exhibited a higher likelihood of consuming roots and tubers compared to respondents from other cities. Vegetables held significance in the diets of households in Baidoa, Jowhar, and Hudur. Meat consumption was more pronounced in households from Jowhar and Hudur, with the former also demonstrating a higher likelihood of consuming fish and other seafood than respondents in other cities, associated with flooding of the Shabelle River.<sup>91</sup> Legumes, nuts, and seeds were more prevalent in the diets of households in Mogadishu, Jowhar, and Hudur.

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<sup>88</sup> FEWS NET. *Somalia Price Bulletin*. Washington, D.C.: FEWS NET, 2023, 1.

<sup>89</sup> The twelve food groups include cereals and other foods made from grains such as any bread, rice, noodles, biscuits, or other foods made from millet, sorghum, maize, rice, or wheat; roots and tubers (e.g., potatoes, yams, manioc, cassava); vegetables; fruits; flesh foods (e.g., meat such as beef, pork, goat, chicken, duck, wild animals, seafood, grubs, snails, and insects) and organ meat (e.g., liver, kidney, heart, and other organ meats from domesticated animals and wild animals); eggs; fish and other seafood; legumes, nuts and beans; milk and milk products (i.e. milk or food prepared with milk); foods made or cooked with oils, fats and butter; sugar or honey; spices, condiments and beverages.

<sup>90</sup> The data does not account for the intra-household variation in dietary diversity.

<sup>91</sup> Interviewed respondents consistently stated that when the Shabelle river floods, people in Jowhar shift their food consumption to heavily rely on fish, in part also because crops are damaged or washed away by flood waters.

Households primarily favor imported foods such as rice, pasta, and flour, even though these are not locally produced. During periods of drought or when preferred foods are unavailable due to shortages, households shift their consumption towards locally grown staples like sorghum, cowpeas, and maize. An emphasis on stability and availability characterizes the preference for imported foods: “The most preferred foods are rice, flour, and pasta because these are always available in the local market, and their price is mostly stable. These foods are always available in the local markets, but in case they are not available, we buy locally grown foods such as maize, sorghum, and cowpea.”<sup>92</sup>

*Table 6: Food Groups Consumed by Households in the Past Week*

	Mogadishu	Afgoye	Jowhar	Hudur	Baidoa	Kismayo
Cereals	94.9%	97.8%	99.1%	100.0%	99.6%	97.5%
Sweets (sugar, honey)	80.7%	97.4%	92.7%	90.2%	97.4%	84.1%
Oils and fats	85.6%	95.2%	73.0%	91.1%	98.3%	70.3%
Spices, condiments, beverages	94.4%	88.3%	91.0%	87.7%	96.5%	47.4%
Legumes, nuts, and seeds	85.9%	60.0%	93.1%	94.5%	80.9%	61.2%
Vegetables	76.2%	67.4%	83.3%	79.5%	83.9%	54.7%
Meat	69.8%	53.5%	93.6%	94.0%	56.5%	59.0%
Tubers and roots	62.9%	69.6%	79.8%	85.9%	60.4%	50.2%
Milk or milk products	58.3%	66.5%	67.0%	32.3%	57.4%	19.6%
Fruits	41.8%	32.6%	57.9%	49.8%	35.2%	18.0%
Eggs	36.3%	9.6%	49.8%	42.1%	16.5%	14.1%
Fish or other seafood	28.5%	6.5%	94.4%	8.5%	9.6%	16.2%

When asked about changes in food group purchasing habits during the lean season, respondents from all cities indicated a reduction in the purchase of every food group during this period, citing common food shortages between autumn and spring, signaling the end of the rainy season. “Food shortages are common between autumn and spring; this time signifies that the rainy season (Oct-Dec) has ended.”<sup>93</sup> Asset transfers and support for savings through the Graduation Approach may help households smooth consumption during lean seasons.

Table 7 illustrates the monthly average (median) quantities of target crops and livestock/fish purchased by respondents across both the lean and harvest seasons. It is evident that households consistently exhibit a strong preference for rice over domestically produced maize, sorghum, and cowpea. The monthly purchased quantities of meat are modest, with camel meat purchases slightly outweighing goat and sheep meat. Notably, households in Afgoye, on average, do not purchase any meat; combined with the results from Table 6 above, which show that around half of households in Afgoye consumed meat in the week preceding data collection, this finding suggests that even those households that consume meat are consuming relatively small amounts.<sup>94</sup> This is attributed to the high cost of meat, which many households find unaffordable. “Most of the time, farmers don’t get meat to eat; here, 1 kilogram of

<sup>92</sup> FGD with host community members, Jowhar

<sup>93</sup> FGD with IDPs, Kismayo

<sup>94</sup> Further validating this finding, within the household survey, among the 53.5 percent of respondents who reported meat consumption within their households in the preceding 7 days, 34 percent indicated that they only consumed it once or twice during that period.

meat costs around \$5, so it is not common for people to eat meat. Instead, people prefer eating beans over meat.”<sup>95</sup>

*Table 7: Monthly Average Crop and Protein Purchase Quantity, Lean and Harvest Seasons*

Location	Crops					Proteins		
	Sorghum (kg)	Sesame (kg)	Cowpea (kg)	Maize (kg)	Rice (kg)	Camel (kg)	Goat/ Sheep (kg)	Fish (kg)
Mogadishu	1.0	0.0	4.0	3.0	12.0	2.0	0.0	0.0
Afgoye	6.0	0.0	3.0	6.0	12.0	0.0	0.0	0.0
Jowhar	2.0	1.0	7.0	10.0	11.0	3.0	2.0	4.0
Hudur	15.0	0.0	5.0	4.0	20.0	1.5	1.0	0.0
Baidoa	23.5	0.0	10.0	15.0	25.0	3.0	0.0	0.0
Kismayo	7.5	0.0	5.0	10.0	25.0	2.0	0.0	0.0

### PATHWAYS TO FOOD ACCESS

The predominant method of acquiring food for respondents in the study areas, including both IDPs and host communities, is purchase in local markets (82 percent)<sup>96</sup>. Other prevalent methods include bartering and trade (11 percent), home-based production (5 percent), and receiving gifts or loans from family, clan members, neighbors, or community members (7 percent). According to a focus group discussion with IDPs in Baidoa, “Communities often play a significant role in coping with food scarcity: cooperation and collective decision-making are vital during such rough times. Traditional leaders, drawing on their experience, can collect resources over time to support the most vulnerable members of the community, but they can't sustain this support for an extended period. We also cooperate with each other and barter some foods, such as livestock, for other food items.” While community collaboration is undeniably significant, Wicaksono and King find that social capital within IDP communities is often lower compared to host communities.<sup>97</sup> This discrepancy is attributed to the geographical displacement of many IDPs residing in camps, distanced from their home communities and clans, and may limit IDPs’ ability to collaborate with communities for support during difficult times.

On average, only 4 percent of IDP households rely on home-based production to access food groups. IDPs often lack access to land for cultivating crops and face the constant threat of eviction. In larger cities like Mogadishu and Baidoa, the most vulnerable communities typically rely on humanitarian aid. “Some of the community members, their major source of income is from humanitarian agencies, and they depend on humanitarian aid since they don't have another alternative source of income.”<sup>98</sup> One of the IDP members from Mogadishu further explained, “We eat whatever is available, and we buy it from

<sup>95</sup> FGD with members of agricultural organizations, Afgoye

<sup>96</sup> For IDPs, particularly those situated within the AOI, local markets tend to be smaller and more rural, characterized by a less diverse range of goods. Conversely, members of the host communities residing closer to the central areas of district towns often have access to larger markets, where agricultural produce and livestock from rural regions are aggregated.

<sup>97</sup> Wicaksono and King, 2024

<sup>98</sup> FGD with IDPs, Baidoa

the market. We are poor people, so we don't have a specific food preference; we eat whatever we can get."<sup>99</sup>

Additionally, IDPs often undertake small tasks, such as laundry or plowing, in exchange for food or money. As articulated in another focus group discussion with IDPs in Kismayo, "We knock on the doors of families that make more food and ask for food to eat. We also get food from families after doing their laundry. Sometimes, they offer us money, and other times, they give us cooked food. We sometimes have to travel to remote locations and get lost while looking for food. When I see clean food being offered to cattle, I ask if I can take it and feed my children."

Compared to host communities, IDPs are more inclined to receive food as a gift or request food loans from neighbors, family members, or clan members. For example, when asked how they accessed cereals and other grain-based foods, 11 percent of IDPs stated it was a gift/loan from family, clan members, neighbors, or community members, while only 4 percent of host community members claimed the same. The most mentioned food groups that IDPs have either received as a gift or a loan from family, clan members, neighbors, or community members include cereals and other foods made from grains; legumes, nuts, and seeds; and sugar.

## FACTORS INFLUENCING ACCESS TO MARKETS AND FOOD

Various factors influence households' ability to access food in the study areas:<sup>100</sup>

- **Market safety concerns:** In the household survey, 29 percent of respondents identified safety as a significant issue. The perceived safety of markets varies across locations, and the unpredictable nature of terrorist attacks poses a major constraint on households' access to markets. According to one respondent, "Yes, I witness a major constraint that households face in trying to access the market. These include security issues because, as you know, terrorist attacks are unpredictable."<sup>101</sup>
- **Unsafe roads to the market:** For 11 percent of respondents, the safety of the route to the market was a notable concern. Female respondents, in particular, highlighted the increased risk of robbery or assault during the journey to the market, especially in districts with security challenges. One participant expressed, "Yes, we face challenges like thefts and rapists harassing girls on the way to the market. We frequently encounter rape and petty theft. These issues occur due to the insecurity in the district, as the environment isn't safe."<sup>102</sup>
- **Isolation during the rainy season:** Respondents commonly noted that roads to markets are unpaved and become muddy during rainy seasons. This poses a significant challenge for rural residents, particularly those in remote areas, making access to markets difficult.
- **Limited income and income-generating opportunities:** Many respondents lamented the lack of high-wage job opportunities for IDPs in cities. Even when IDPs secure employment, it is often low-paid and short-term, restricting their access to food because of a lack of income to spend on

<sup>99</sup> FGD with IDPs, Mogadishu

<sup>100</sup> Other factors include diminished social capital and disrupted social networks resulting from displacement, restricted access to land for IDPs, the precarious nature of land tenure, and the vulnerability associated with aid. For extensive discussion, see Wicaksono and King, 2023.

<sup>101</sup> FGD with IDPs, Hudur

<sup>102</sup> FGD with IDPs, Mogadishu

food. One participant explained, “There are some challenges like a lack of job opportunities and limited labor work, such as washing clothes, given the availability of washing machines in the community. Also, the use of wheelbarrows has diminished due to Bajaj motorcycles. So, we don't do much. We don't have money to purchase food.”<sup>103</sup>

- **Seasonal price fluctuations that impact consumers' purchasing power:** Respondents raised concerns about seasonal price fluctuations affecting consumers' purchasing power, particularly during lean seasons. Prices tend to rise during these periods when consumers have limited financial resources, exacerbating struggles to afford food. Furthermore, a significant contributor to the deterioration of acute food insecurity in many regions of Somalia has been the substantial increase in food prices since mid-2021. Food prices persistently exceed the five-year average in many markets, leading to ongoing challenges in securing adequate food access for most impoverished households.<sup>104</sup>
- **Displacement and marginalization:** Informal, clan-based social capital—the resources and networks available through relationships with different groups and social organizations—is critical for accessing food, land, income, and humanitarian aid. IDPs and other disadvantaged groups often have very weak social capital and are excluded from influential social networks, directly limiting their ability to access food.<sup>105</sup>

Access to food also differs across various age groups. Older individuals who are less involved in work often encounter challenges in obtaining food. Conversely, younger individuals typically have more opportunities for manual labor, enhancing their food accessibility by providing them with income to purchase food. According to a youth leader in Baidoa, “The youth access food more easily than the elderly, as the youth are mostly employed and earn income.”

However, insights derived from KIIs with youth leaders underscore the prevalent challenges of high unemployment rates and limited economic opportunities among the youth. The primary engagement for youth revolves around manual labor occupations, predominantly in farming and construction activities. Youth participants expressed a dearth of dedicated initiatives, mentorship programs, or supportive networks designed specifically to identify and pursue viable income-generating activities.

In addressing these concerns, youth leaders proposed an augmentation of initiatives aimed at enhancing the skill sets of the youth. Recommendations included the provision of financial support for youth-driven business ideas and the establishment of youth centers. A youth leader from Baidoa emphasized the significance of organizations like Cooperazione Internazionale (COOPI) and the International Organization for Migration, which impart practical skills such as carpentry, tailoring, and mobile phone repair to enable youth self-sufficiency. The leader urged NGOs to further promote skills development and income-generating activities, citing instances where lack of capital impedes the translation of youth business ideas into productive endeavors. “The community and youth harbor business ideas such as livestock ownership or farming; however, a lack of capital impedes the realization of these ideas into productive ventures. Furthermore, there is a shortage of youth centers where they can enhance their

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<sup>103</sup> FGD with IDPs, Mogadishu

<sup>104</sup> Food Security and Nutrition Analysis Unit. *Somalia Food Security and Nutrition Outcomes and Projections (March-June 2023)*. Mogadishu, Somalia: FSNAU, 2023, 2.

<sup>105</sup> Other factors include restricted access to land for IDPs, the precarious nature of land tenure, and the vulnerability associated with aid. For extensive discussion, see Wicaksono and King, 2023.

skills, learn report writing and CV preparation, and broaden their knowledge and proficiency in computer studies.”<sup>106</sup>

Gender plays a pivotal role in disparities related to food access. Men tend to secure employment in physically demanding roles, whereas women, often responsible for managing household responsibilities, encounter challenges in obtaining jobs to purchase food. Women face formidable structural obstacles and discriminatory practices hindering the expansion of their entrepreneurial endeavors. The Gender Inequality Index for Somalia is 0.776, the fourth most unequal place globally concerning gender disparities.<sup>107</sup> The labor landscape is characterized by limited opportunities and a substantial gender gap.<sup>108</sup> Traditional legal frameworks, employed instead of a formal state judiciary, exhibit pronounced discriminatory tendencies against women.<sup>109</sup> Additionally, women contend with a lack of control over assets and bank accounts, impeding their ability to access loans and credit facilities.<sup>110</sup> Female employment opportunities are also limited. Women often undertake low-wage jobs such as laundering, managing small-scale retail shops, and participating in light farming activities, including weeding, harvesting, and tending to harvested crops. A woman leader in Jowhar highlighted, “The main challenge women are facing is a lack of income sources. Women also encounter difficulties in accessing startup capital to open small shops to generate income for acquiring food. Women do not take up hard labor jobs such as digging irrigation canals because they lack the required physical strength. In that case, women are excluded from those jobs. Women are only given light daily farming activities such as weeding or harvesting fruits and grains in the farms.” Targeting women for asset transfers or provision of seed capital with the Graduation Approach may help provide them with the startup capital needed to establish a business or other income generation activity, thus providing a pathway for more consistent income generation and food access. We note, however, that these interventions will not address the structural obstacles faced by women, which may limit women’s potential for economic empowerment even where the Graduation Approach is implemented.

However, it appears that social norms are evolving, and more women are now working and becoming breadwinners for their families. A woman leader in Mogadishu mentioned, “Nowadays, women have the responsibilities of their homes and provide for their families since men are unemployed. Before, women used to care for the kids and stay at home, but nowadays, they also provide for their families.” Another woman leader in Jowhar said, “In fact, women face challenges in taking on roles and responsibilities in the household, as well as engaging in daily jobs to generate income to buy food for the household. However, we, as women, do not have any other option but to take up both of those roles at the same time. You might even see a pregnant woman working on a farm just to earn a small amount of money to buy food for the family because her husband doesn't have a job or any other source of income.” However, women who do secure employment often face a high risk of harassment and mistreatment.

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<sup>106</sup> KII with a youth leader, Baidoa

<sup>107</sup> Ali, Hussein Yusuf. A Call for Inclusive Entrepreneurship in Somalia: Opportunities and Barriers for Female Entrepreneurs in Accessing Micro-Finance. Garowe, Somalia: Somali Institute for Development Research and Analysis (SIDRA), 2019, 8.

<sup>108</sup> World Bank and FAO, 2018, 32.

<sup>109</sup> ILO. *Institutional and Policy Assessment of Factors Affecting Women Entrepreneurs in Micro and Small enterprises in Hargeisa and Mogadishu*. Geneva, Switzerland: ILO, 2013.

<sup>110</sup> Ali, 2019, 7.



“Women in this community face a lot of problems. Sometimes, when women engage in manual labor, people tend to harass them, accuse them of stealing, beat them, rape them, and mistreat them.”<sup>111</sup>

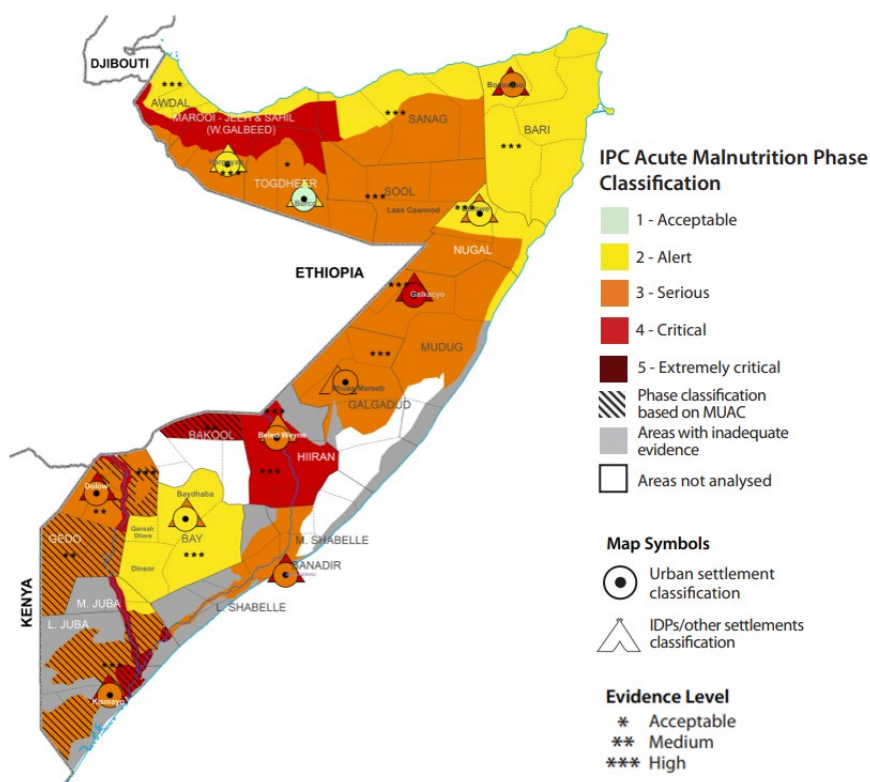
Minority clans also confront obstacles when seeking food access. They often grapple with negative social norms that result in the segregation of minority groups based on their social status. “We encounter challenges such as resource denial because we are looked down upon for belonging to a minority clan. In most cases, we do not get paid for our labor as [employers] demonstrate the influence of belonging to major clans.”<sup>112</sup>

## FOOD UTILIZATION, NUTRITION, AND WASH

### MALNUTRITION

Analysis by the Integrated Food Security Phase Classification (IPC) finds that the majority of population groups in Somalia are facing either critical or serious acute malnutrition situations, despite a productive early 2023 rainy season (*gu*).<sup>113</sup> Within the AOI, acute malnutrition status was classified as serious within Baidoa (including for IDPs), Kismayo, and Mogadishu and critical among Mogadishu IDPs and Kismayo IDPs (Figure 12). The prevalence of Global Acute Malnutrition (GAM) in these areas ranges from a low of 9.3 percent in Baidoa urban areas to a high of 18.4 percent among Mogadishu IDPs (Table 8).<sup>114</sup> For the AOI, the FAO and

Figure 12: IPC Acute Malnutrition Status



<sup>111</sup> KII with a woman leader, Mogadishu

<sup>112</sup> FGD with IDPs, Mogadishu

<sup>113</sup> IPC. *Somalia: IPC Acute Food Insecurity and Acute Malnutrition Analysis (August - December 2023)*. Nairobi: IPC, 2023. The IPC defines five severity phases for acute malnutrition: (1) acceptable, (2) alert, (3) serious, (4) critical, and (5) extremely critical. Serious is described as 10-14.9 percent of children are acutely malnourished. Critical is described as 15-29.9 percent of children are acutely malnourished, mortality and morbidity levels are elevated or increasing, and individual food consumption is likely to be compromised. For more information, see the IPC Technical Manual: <https://www.ipcinfo.org/ipcinfo-website/ipc-overview-and-classification-system/ipc-acute-malnutrition-classification/en/>.

<sup>114</sup> Ibid.

FSNAU additionally estimate GAM prevalence at 15.3 percent for the Kismayo district, 16.6 percent for Hudur district, 18 percent for Afgoye district, 18.3 percent for Jowhar district, 19.1 percent for Baidoa district, and 19.6 percent for Banadir district (Mogadishu), with all six districts having a critical acute malnutrition status.<sup>115</sup> Di Marcantonio, Custodio, and Abukar note that malnutrition indicators, including GAM and stunting, are consistently worse among IDPs compared to host communities.<sup>116</sup>

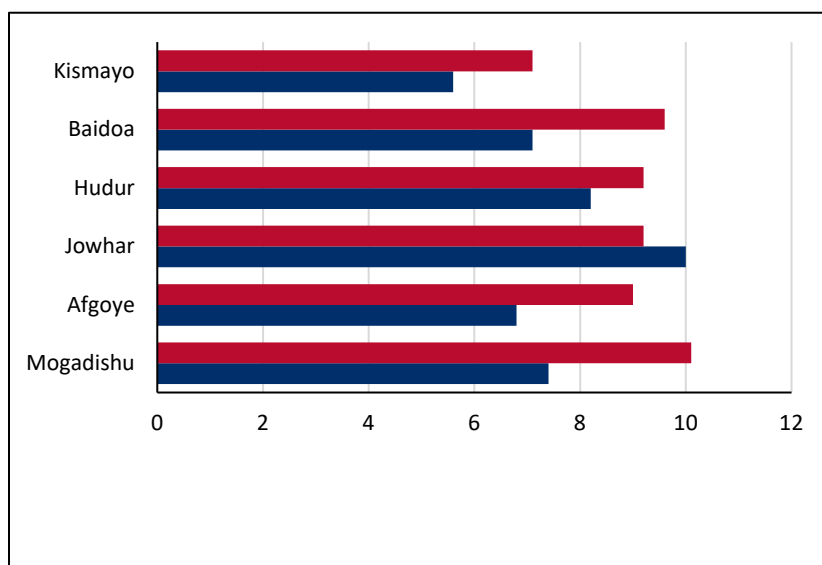
Table 8: Prevalence of GAM in AOI

Population Group	GAM Prevalence, 2023 <i>Gu</i>	GAM Prevalence, 2022 <i>Gu</i>
Baidoa urban	9.3%	11.3%
Kismayo urban	10.3%	18.2%
Mogadishu urban	14.8%	14.4%
Baidoa IDPs	10.8%	28.6%
Kismayo IDPs	17.0%	14.0%
Mogadishu IDPs	18.4%	26.6%

Source: IPC, 2023

Some of the key drivers of acute malnutrition include low-quality diets, inadequate food consumption, and poor access to safe water and sanitation, which leads to health issues such as diarrhea that exacerbate malnutrition. Low coverage of vitamin supplementation and vaccinations—especially of measles, a disease with adverse nutritional effects—also leads to malnutrition.<sup>117</sup> Jaspars also notes that malnutrition is a politicized experience, as power dynamics limit marginalized groups’ access to resources and food aid that bolster nutritional status.<sup>118</sup>

Figure 13: Mean HDDS by AOI and IDP Status



**DIETARY DIVERSITY**

The average Household Dietary Diversity Score (HDDS) for all respondents stood at 7.9 out of 12 food groups but variations in this figure were observed across different locations and between IDPs and members of the host community (Figure 13). IDPs had, on average, lower HDDS than host communities, except for Jowhar, where IDP dietary diversity was slightly higher than

<sup>115</sup> United Nations Food and Agriculture Organization (FAO) and Food Security and Nutrition Analysis Unit (FSNAU) – Somalia. “Somalia 2023 Post Gu Acute Malnutrition Median Prevalence by District (Estimated).” Mogadishu: FAO and FSNAU, 2023.

<sup>116</sup> Di Marcantonio, Federica, Estefania Custodio, and Yusuf Abukar. “Child Dietary Diversity and Associated Factors Among Children in Somalian [sic] IDP Camps.” *Food and Nutrition Bulletin* 41, no. 1 (2020): 61-76.

<sup>117</sup> IPC, 2023.

<sup>118</sup> Jaspars, 2022, 46.

host communities. For IDPs, dietary diversity was lowest in Kismayo, at 5.6 food groups consumed, followed by Afgoye (6.8), Baidoa (7.1), Mogadishu (7.4), Hudur (8.2), and Jowhar (10.0).

Almost 88 percent of respondents reported consuming at least one protein-rich food in the past week, including 84.6 percent of IDPs and 94.2 percent of host community members. Respondents reported consuming an average of 6.2 protein sources per week (5.2 IDPs, 8.6 host community members), meaning that on average, protein is not consumed every day.

There is a discernible difference in the types of foods consumed corresponding to the rise in HDDS, as indicated in Table 9. Households with the lowest dietary diversity primarily rely on cereals and sugar, while those with medium dietary diversity also incorporate oils and fats, as well as spices, condiments, and beverages. In contrast, households with the highest dietary diversity consume notably more protein- and vitamin-rich food sources, encompassing a variety of items such as legumes, nuts, and seeds, tubers and roots, vegetables, meat, and milk and milk products.

*Table 9: Food Groups Consumed by ≥50% of Households by Dietary Diversity in Southern Somalia*

Lowest dietary diversity (≤ 3 food groups)	Medium dietary diversity (4 and 5 food groups)	High dietary diversity (≥ 6 food groups)
Cereals	Cereals	Cereals
Sweets (sugar, honey)	Sweets (sugar, honey)	Sweets (sugar, honey)
	Oils and fats	Oils and fats
	Spices, condiments, and beverages	Spices, condiments, and beverages
		Legumes, nuts, and seeds
		Tubers and roots
		Vegetables
		Meat
		Milk and milk products

## CHILD MALNUTRITION AND DIETARY DIVERSITY

IPC estimates that 1.5 million children in Somalia were acutely malnourished between October and December 2023, including 330,000 facing severe acute malnutrition.<sup>119</sup> In a study of IDP children, Di Marcantonio, Custodio, and Abukar found that 18 percent were acutely malnourished and 29 percent stunted, with significantly higher GAM rates among boys (20.8 percent) than girls (15.1 percent).<sup>120</sup> Kalid et al. similarly find GAM rates of 13.5 percent for children in Baidoa IDP camps.<sup>121</sup>

Di Marcantonio, Custodio, and Abukar estimate only 14.8 percent of children in IDP camps meet minimum dietary diversity criteria.<sup>122</sup> Similarly, the DNS–FGS finds that only around 11 percent of children aged 6-23 months in urban areas are fed according to recommended Infant and Young Child

<sup>119</sup> IPC, 2023.

<sup>120</sup> Di Marcantonio, Custodio, and Abukar, 2020, 61-76.

<sup>121</sup> Kalid, Mohamed, et al. "Infant and Young Child Nutritional Status and Their Caregivers' Feeding Knowledge and Hygiene Practices in Internally Displaced Person Camps, Somalia." *BMC Nutrition* 5, no. 1 (2019): 1-11.

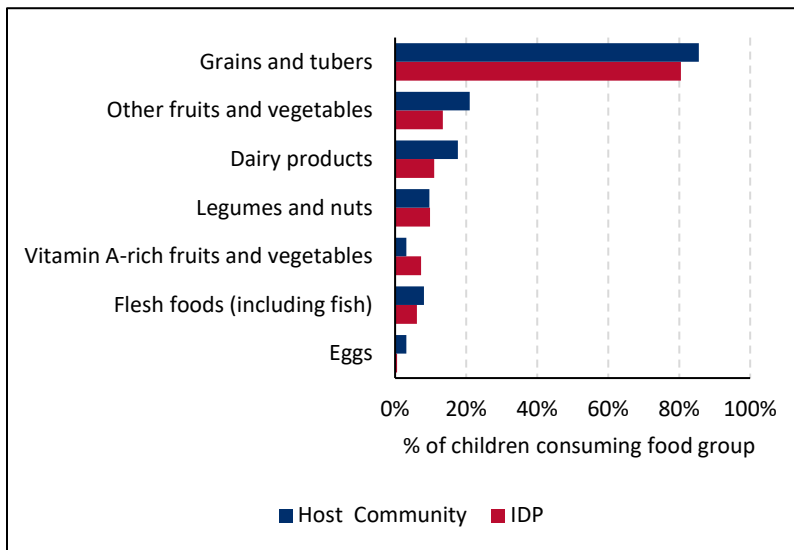
<sup>122</sup> Di Marcantonio, Custodio, and Abukar, 2020, 61-76.

Minimum criteria are consuming at least four food groups out of the following seven: (1) grains and tubers, (2) legumes and nuts, (3) dairy products, (4) flesh foods, (5) eggs, (6) vitamin A-rich fruits and vegetables, and (7) other fruits and vegetables.

Feeding practices.<sup>123</sup> Within the AOI, we found that only 2.4 percent of IDP children and 8.1 percent of host community children aged 0-24 months who were not exclusively breastfeeding consumed at least four food groups in the day preceding data collection, while 79.3 percent of IDP children and 69.4 percent of host community children consumed only one food group. Over 80 percent of households with children under the age of 2 who were eating food reported that the child ate grains and tubers. Consumption of other food groups was far more limited, with the second most consumed food group, fruits, and vegetables not rich in vitamin A, being consumed by only 13.4 percent of IDP children and 21.0 percent of host community children. Di Marcantonio, Custodio, and Abukar also found that basic staples and dairy products dominate children's diets, while fruits, vegetables, and eggs are seldom consumed.<sup>124</sup>

Only 7.7 percent of IDP children under the age of 2 and 9.7 percent of host community children who were breastfeeding were exclusively breastfed. Among children who were not exclusively breastfed, 90.3 percent drank water and 46.9 percent drank milk (excluding formula and breastmilk). Milk, including cow and camel milk, is often viewed as an appropriate food for children; one host community member in Jowhar stated that "If livestock milk is not available, we buy powdered milk for our children."

Figure 14: Child Dietary Diversity



Over 18 percent of women who gave birth within the past two years reported waiting more than one hour after birth to breastfeed their baby, and 31.4 percent of women reported their baby was given a drink other than breastmilk in the first three days after delivery. The DNS-FGS finds similarly inadequate breastfeeding practices, with only 60 percent of children breastfed within the first hour of birth, only 30 percent of children under 6 months exclusively breastfed, and only 28 percent of breastfed children fed

the minimum frequency of meals.<sup>125</sup>

Children's intake of vitamin A and iron-rich foods, as well as access to iron supplements and deworming medication, increase with higher maternal education and improved household wealth.<sup>126</sup> Kalid et al. found that limited caregiver knowledge of nutrition practices, especially breastfeeding benefits and complementary foods, may result in child malnutrition.<sup>127</sup> Studies on the impact of cash and voucher assistance on child malnutrition in Somalia have found mixed results. Doocy et al. discovered no significant effect of vouchers or mixed cash, in-kind, and voucher assistance on GAM rates, mid-upper

<sup>123</sup> DNS – FGS, 2020, 160.

<sup>124</sup> Di Marcantonio, Custodio, and Abukar, 2020, 61-76.

<sup>125</sup> DNS – FGS, 2020, xxx.

<sup>126</sup> Ibid, 158.

<sup>127</sup> Kalid et al., 2019, 1-11.

arm circumference, and dietary diversity.<sup>128</sup> Grijalva-Eternod et al. found a small positive effect of cash-based interventions on child dietary diversity but no effect on acute malnutrition.<sup>129</sup> These results broadly align with global studies on the impact of cash assistance on nutritional outcomes; a global meta-analysis conducted by Manley et al., for example, found only small impacts of cash transfers on stunting and wasting. This study, however, also found that cash transfers combined with behavior change communication, especially related to WASH and hygiene, were associated with stronger nutrition-related outcomes.<sup>130</sup>

Coverage of emergency nutrition services is fairly widespread in Somalia; the Somalia Nutrition Cluster reports that 3.6 million people in Somalia were reached with nutrition response between January and October 2023, of 4.9 million people in Somalia in need of nutrition response. These nutrition services are almost entirely provided by NGOs, with the Nutrition Cluster reporting that 64 percent of services in 2023 were provided by national NGOs, 26 percent by international NGOs, and only 9 percent by the government, the UN, or others.<sup>131</sup> While services are widespread, insecurity, difficulty reaching remote and pastoral populations, and funding limitations relative to the high level of need limit the reach and efficacy of services.

## FERTILITY AND FAMILY PLANNING

Somalia has one of the highest fertility rates in the world, at 6.3 births per woman.<sup>132</sup> The neonatal mortality rate is 40 deaths per 1,000 live births and the maternal mortality rate is estimated at 732 deaths per 100,000 live births.<sup>133</sup> Within the AOI, 52.9 percent of surveyed IDPs and 46.8 percent of host community women between the ages of 18 and 49 were currently pregnant or had given birth within the past two years. The DNS–FGS found a median spacing between births of 21 months and a median age of first birth of 21 years. Fertility rates are lower among urban populations and for women with more years of education.<sup>134</sup>

Only 7 percent of married women ages 15–49 use contraception; the most common contraceptive methods are lactational amenorrhea, pills, injectables, implants, and condoms. In a national survey, 68 percent of women who had given birth in the prior five years stated the birth was desired at the time of occurrence and 37 percent of women expressed an unmet need for birth spacing services, with 29 percent seeking to space births and 8 percent wishing to discontinue childbearing.<sup>135</sup> Family planning remains a sensitive topic for open discussion in Somalia due to myths, misconceptions, and socio-

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<sup>128</sup> Doocy, Shannon, Martin Busingye, Emily Lyles, Elizabeth Colantouni, Bridget Aidam, George Ebulu, and Kevin Savage. “Cash and Voucher Assistance and Children’s Nutrition Status in Somalia.” *Maternal and Child Nutrition* 16, 3 (2020).

<sup>129</sup> Grijalva-Eternod, Carlos S., et al. “A Cash-based Intervention and the Risk of Acute Malnutrition in Children Aged 6–59 Months Living in Internally Displaced Persons Camps in Mogadishu, Somalia: A Non-randomized Cluster Trial.” *PLoS Medicine* 15, no. 10 (2018): e1002684. We note that these studies only examined the impact of cash, vouchers, or in-kind assistance on nutrition outcomes; they did not examine programs with social and behavior change components.

<sup>130</sup> Manley, James, Harold Alderman, and Ugo Gentilini. “More evidence on cash transfers and child nutritional outcomes: a systematic review and meta-analysis.” *BMJ Global Health* 7, no. 4 (2022).

<sup>131</sup> Nutrition Cluster and UNICEF. Somalia Nutrition Cluster Achievement Dashboard (January to October 2023). Mogadishu: Nutrition Cluster and UNICEF, 2023.

<sup>132</sup> World Bank. “Fertility rate, total (births per woman).” Washington, D.C.: World Bank, 2021.

<sup>133</sup> Gele, A. “Challenges Facing the Health System in Somalia and Implications for Achieving the SDGs.” *European Journal of Public Health* 30, no. 5 (2020).

<sup>134</sup> DNS – FGS, 2020, 77.

<sup>135</sup> *Ibid*, 83.

cultural barriers related to modern contraceptive methods. As a result, the adoption of birth spacing is limited.<sup>136</sup>

**WATER AND SANITATION**

Nationally, around 52 percent of Somalis have access to basic drinking water supply, with significant variations between rural areas (28 percent) and urban areas (83 percent). Only 38 percent of the population has access to basic sanitation facilities, ranging from 20 percent in rural areas to 61 percent in urban areas. Because of limited access to sanitation facilities, 28 percent of the population resorts to open defecation.<sup>137</sup>

Within the AOI, Figure 15 shows access to unprotected and protected water sources.<sup>138</sup>

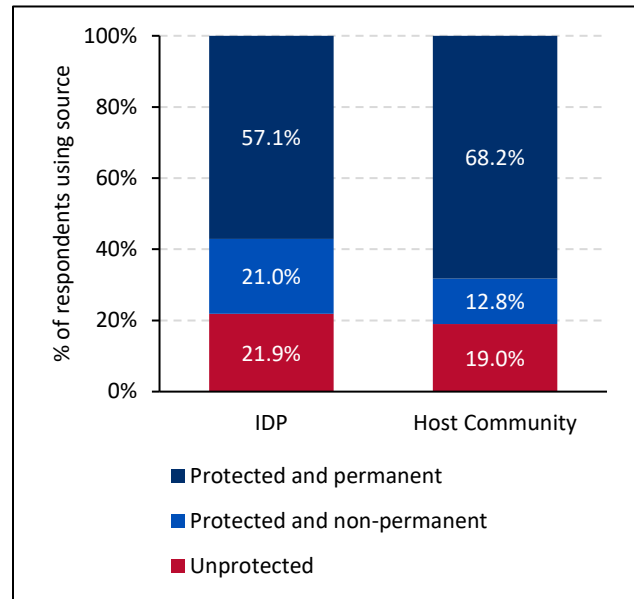
Compared to host communities, IDPs use unprotected and protected but non-permanent (e.g., tanker trucks or bottled water) sources more frequently, putting them at greater risk of waterborne illness and increasing the cost of water. Collecting water is also more time-consuming for IDPs, as it involves longer trips to the water source and back home; IDPs reported an average of 27.7 minutes to fetch water and return home compared to 16.5 minutes for host community members.

Only 8.2 percent of IDPs and 3.6 percent of host community members reported resorting to open defecation, although this may be underestimated due to the stigma associated with this practice.

Over 70 percent of IDPs reported sharing their toilet facilities with another household. The median number of households they share these facilities with is seven.

Numerous government management structures exist with limited accountability for sanitation; these structures lack well-defined roles and responsibilities. Ongoing uncertainty over the most appropriate ministry to take responsibility for sanitation remains unresolved.<sup>139</sup> In part because of these challenges, a significant share of funding and responsibility for water and sanitation circumvents government channels.<sup>140</sup> Instead, sanitation is often viewed as a community or individual matter,<sup>141</sup> while diaspora

Figure 15: Water Source in AOI



<sup>136</sup> Ojuolape, Niyi. "Trusting the process: Family planning and contraceptive uptake in Somalia." Mogadishu: United Nations Population Fund, 2023.

<sup>137</sup> United Nations Children’s Fund (UNICEF). *Somalia WASH Profile*. Mogadishu: UNICEF, 2020.

<sup>138</sup> Unprotected water sources include unprotected wells and surface water. Protected, permanent water sources include piped water, protected wells, and rainwater. Protected, nonpermanent water sources include tanker trucks, water sellers or water societies, and bottled water.

<sup>139</sup> Ibid.

<sup>140</sup> World Bank, 2018, 41.

<sup>141</sup> UNICEF, 2020.

and donor funding may be directed to the private sector, UN agencies, or NGOs.<sup>142</sup> To date, the primary focus of sanitation investment in Somalia has been on subsidizing latrine construction programs. However, there is limited evidence showing a substantial improvement in latrine use or enhanced sanitation and hygiene despite these investments.<sup>143</sup>

## HEALTH AND INFECTIOUS DISEASE

Outbreaks of diseases including acute watery diarrhea (AWD), cholera, and measles are common occurrences in Somalia.<sup>144</sup> In the dry season, rural populations tend to prioritize the quantity of available water over its quality, which can lead to outbreaks of waterborne diseases.<sup>145</sup> Accordingly, Somalia has had uninterrupted cholera transmission in 29 drought-affected districts, including Afgoye, Baidoa, Hudur, Jowhar, and Kismayo, since 2022 and in Banadir region (Mogadishu) since the 2017 drought.<sup>146</sup> While no detailed data on AWD is available for the AOI, a 2023 study within an IDP camp in Burhakaba<sup>147</sup> found an overall AWD incidence of 16.7 percent with the highest incidence rates among children under the age of 5. AWD risk was correlated with use of unprotected wells, lack of latrines, poor handwashing practices, and reduced food intake.<sup>148</sup>

The DNS–FGS found that 60.3 percent of children aged 12–23 months in Somalia have not received any vaccinations, and only 10.7 percent received all basic vaccinations.<sup>149</sup> Access to healthcare is generally limited, as healthcare services are mostly privatized and concentrated in major urban centers; Gele found that less than 30 percent of the Somali population has access to health services.<sup>150</sup>

Overall, these findings show the importance of healthcare interventions through the Graduation Approach. Other aspects of the Graduation Approach may also strengthen health and nutrition, however, as interventions support households to escape from poverty and thus lessen income constraints which frequently drive malnourishment and poor health.

## CONCLUSION AND IMPLICATIONS

Somalia faces a persistent shortage of locally produced food, meeting only 22 percent of per capita cereal needs. Even during optimal agricultural seasons, local output covers only 40–50 percent of requirements. Respondents cite various challenges in crop production, including unpredictable weather, water scarcity, pest damage, poor transportation, lack of capital for seeds, and difficulties accessing fertilizers and credit. Livestock rearing confronts challenges such as frequent diseases, inadequate pasture, and water scarcity, as reported by survey participants. To cope with these production

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<sup>142</sup> World Bank, 2018, 41.

<sup>143</sup> UNICEF, 2020

<sup>144</sup> FSNAU, 2023.

<sup>145</sup> UNICEF, 2020.

<sup>146</sup> World Health Organization (WHO). *Acute watery diarrhoea/cholera situation report, Week 42, 16–22 October 2023*. Mogadishu: WHO, 2023.

<sup>147</sup> A town in the Bay region located between Baidoa and Afgoye.

<sup>148</sup> Jayte, Mohamed, and Maryan Dahir. “Incidence of Acute Watery Diarrhea among Internally Displaced People in Burhakaba Camps, Bay Region, Somalia.” *medRxiv* (2023).

<sup>149</sup> DNS – FGS, 2020, 133.

<sup>150</sup> Gele, 2020.

challenges and the resulting food production deficit, there has been a significant increase in agricultural imports since the late 1980s, particularly grains, sugar, fruits, vegetables, and animals.

About 80 percent of the region's agricultural land is controlled by al-Shabaab, hindering rural-urban market connections. Despite this, southern Somalia's markets demonstrate effective integration. Markets function without extensive oversight; the government issues licensing permits, but maintains a minimal role in market dynamics. While entry into markets is relatively accessible, IDPs typically encounter more challenges than host community members.

Prices for locally grown crops are generally lower than imported rice. Despite this, many households express a preference for imported foods, relying on locally grown foods only when their preferred foods are not available or are excessively costly. Crop prices increase during the lean season, while livestock prices in most of the AOI fall during the lean season.

Households predominantly purchase food from local markets, with other prevalent means of accessing food, including bartering, home-based production, and gifts or loans. Access to markets is influenced by safety concerns, limited income, seasonal price fluctuations, age, gender, and clan affiliation. Limited access to income generation opportunities constrains access to food for both women and older individuals; safety considerations, especially on roads leading to markets, also limit women's access to markets.

Infrastructure challenges pose a major constraint to both food availability and food access. Roads in Southern Somalia are in poor condition, with basic facilities at major seaports in Mogadishu and Kismayo. Weak infrastructure increases the time and cost of transporting food between locations and increases the potential for food spoilage, especially given inadequate storage systems across the AOI. The prevalence of formal and informal taxation along roads, especially by al-Shabaab, further increases transport costs and thus the costs of food.

Limited food accessibility and challenges in accessing food lead to high levels of malnutrition and low dietary quality. The majority of population groups in Somalia are currently facing either critical or serious acute malnutrition situations, and malnutrition indicators, including GAM and stunting, are consistently worse among IDPs than in host communities. Child malnutrition is prevalent; studies find that up to 18 percent of IDP children are acutely malnourished and only 15 percent meet minimum dietary diversity criteria. Malnourishment and limited access to water, sanitation, and hygiene, especially in IDP camps and rural areas, intersect to increase susceptibility to disease.

Humanitarian aid plays an important role in addressing these issues. Over the past 15 years, food aid in Somalia has largely transitioned from in-kind food assistance to cash transfers, including mobile money transfers and vouchers. The WFP is the primary distributor of food aid in Somalia, employing both cash transfers and in-kind distribution; a wide range of UN agencies, international and Somali NGOs, and bilateral actors additionally operate to provide programming related to access to food, nutrition, WASH, resilience, and displacement, among other areas.

The above findings show the relevance of the Graduation Approach framework—which includes asset transfer, consumption support, savings support, livelihood skill-building, and mentoring/coaching—for impoverished households within the AOI. Because consumption of diverse, quality, and sufficient food is limited and because many households, especially IDP households, have little ability to produce their

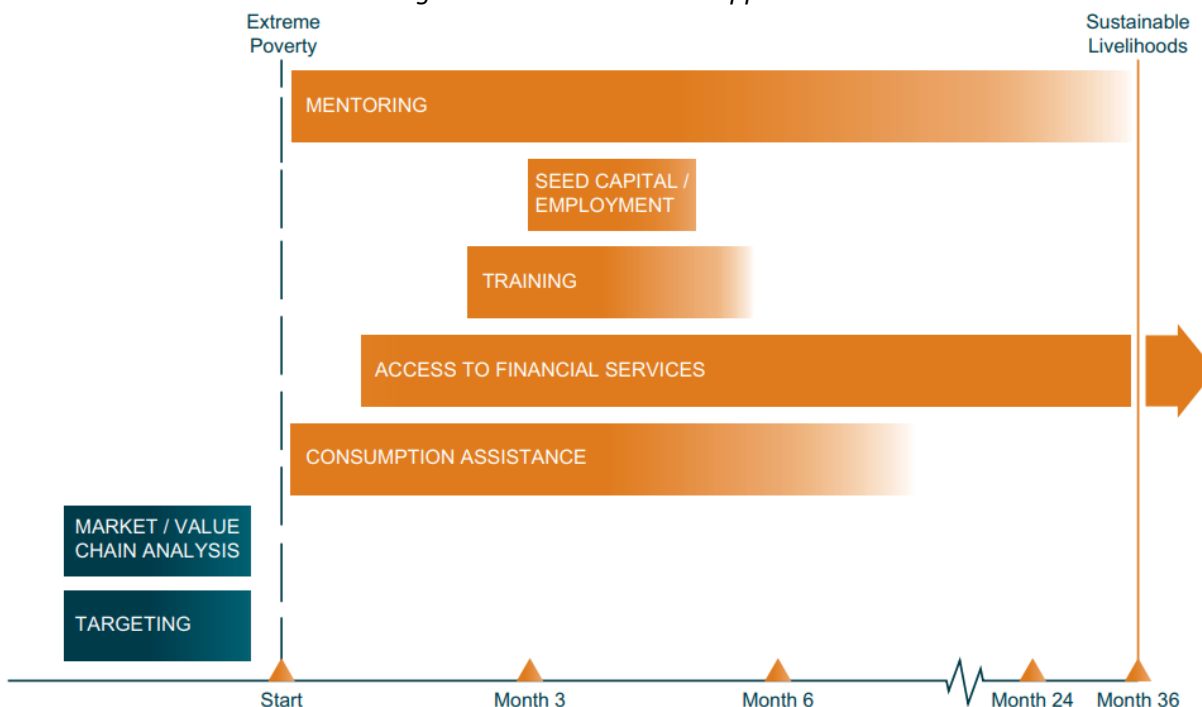


food, the DRMS shows the importance of consumption support, including cash transfers to improve households' access to food. The DRMS also finds that IDP communities have little access to assets, including land and livestock; as such, asset transfers may play an important role in enabling households to become self-sufficient. Interventions such as linkages to healthcare, savings, and social integration may then supplement these benefits by addressing the effects of malnutrition and poor health, improving access to food during lean seasons when income-generating opportunities may be reduced, and helping address dynamics of marginalization that impact food access.

## ANNEX 1: GRADUATION APPROACH

The Graduation Approach was originally developed in 2002 by the Bangladesh Rehabilitation Assistance Committee (BRAC) and has gained international recognition as a key strategy to build secure, sustainable, and resilient livelihoods. It takes a holistic approach to resilience and graduation from extreme poverty, combining and sequencing interventions in areas including social protection, livelihoods, nutrition, WASH, and financial inclusion.

Figure 16: The Graduation Approach



Source: Hashemi and de Montesquiou, 2016

The Graduation Approach addresses multidimensional poverty—situations in which poor families face multiple disadvantages, which may include monetary poverty, lack of assets, lack of health care, limited education, and other challenges. This combination of disadvantages can make it extremely difficult to escape from poverty, as solving any one problem may be insufficient to put the household on a path toward upper mobility, and the intersection of disadvantages can serve to undo the progress made in any one area. The Graduation Approach’s structured, sequenced, and proven approach addresses these multidimensional poverty traps while still providing flexibility for contextually adapted interventions.

Implementation of the Graduation Approach should be carefully targeted toward extremely poor and marginalized households, avoiding the selection (accidental or intentional) of less-deprived households. This targeting approach should engage with communities and local leaders while being cognizant of potential bias of these groups that could disadvantage minority clans/ethnicities, women, or youth. It should also use a social inclusion lens to ensure that potentially marginalized and vulnerable populations, including women, members of different age groups, and marginalized clans/tribes/castes, are included in ways that they want to be targeted and included.

Figure 16 shows the structure and components of the Graduation Approach as published by the Consultative Group to Assist the Poor.<sup>151</sup> These components include consumption assistance, access to financial services, training, seed capital/employment, and mentoring.

**Consumption assistance** acts as a basic safety net for the household, ensuring that any food needs are met to enable households to take on new economic activities and to alleviate the need for choices made through desperation, rather than longer-term planning. As such, the Graduation Approach provides a minimum level of consumption support for a limited, specific period to smooth consumption until they can generate income from new economic activities.

Access to financial services provides participants with basic financial education and support to save money with a formal or community-based financial institution. Encouragement and training for savings help households smooth consumption, cope with shocks, acquire assets, and build social capital.

Skills training may include support for participants to build vocational, management, entrepreneurial, agricultural, or other skills. It may also involve individualized coaching in enterprise selection and management and business plan creation. Training is highly focused and refresher sessions may be provided, particularly if participants are also provided with seed capital.

Seed capital may include either a lump sum cash transfer or transfer of a physical asset, such as livestock, tools, or inventory for retailing. Seed capital is intended to boost capital accumulation and support participants as they expand or start new income-generation opportunities or pursue a trade or education. Importantly, assets are generally provided after participants have undergone livelihood skill training, enterprise selection, and business plan creation. Alternatively, participants may be linked to employment opportunities, especially in urban and peri-urban areas where job markets may be more robust.

Lastly, mentoring includes personalized support to build skills related to the areas described above, as well as in areas such as confidence and empowerment, life skills development, and behavior change. Mentoring begins during the outreach phase of the Graduation Approach and continues throughout the life of the activity. All mentoring should be tailored to specific local needs and cultural practices.

The end of graduation activities is determined by a range of criteria that can be defined based on the local context and goals. Regardless of the specific criteria used, criteria should be clearly defined, measurable, and gender-inclusive, and should generally relate to livelihoods, savings, food and nutrition security, social empowerment, and child well-being.

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<sup>151</sup> See <https://www.cgap.org/sites/default/files/researches/documents/Brief-Graduation-Pathways-Dec-2016.pdf>.

**ANNEX 2: METHODOLOGY**

**RESEARCH OBJECTIVES**

The purpose of this assignment was to provide a desk review and market study on resilience and food and nutrition security in Somalia. The DRMS had two main objectives:

*Table 10: Objectives of DRMS*

Objective	Goal	Scope
Objective 1: Contextual Understanding	To provide BHA and potential implementing partners with a deep contextual understanding regarding the resilience and food and nutrition security context, especially among extremely poor, socially marginalized, and vulnerable populations; stakeholders; and key activity design issues for consideration.	The study will provide an overview and synthesis of the current, projected, and recent historical trends of the resilience and food and nutrition security context and stakeholders in a targeted geographic area.
Objective 2: Inform Activity Design and Implementation of Graduation Approach	To explore how current market systems, conditions, and operating environments may influence the implementation of the Graduation Approach, with a particular focus on key commodities based on local food consumption trends, potential adverse impacts on local production or consumption patterns, consumption support, and livelihood and asset transfer possibilities.	The study will provide evidence on the market systems, conditions, and operating environment which may affect implementation of the Graduation Approach. Given the study’s focus on food and nutrition security, especially among the extremely poor and socially marginalized, the research will particularly analyze options for consumption support and livelihood development, although analysis of relevance to all components of the approach will be included.

During the preparatory processes for the research, USAID selected six target locations in the area of interest: Afgoye, Baidoa, Hudur, Jowhar, Kismayo, and Mogadishu. With input from the research team, USAID also selected seven focus commodities: livestock (including camels, goats, and sheep), fisheries, cowpea, maize, rice, sesame, and sorghum.

**DATA COLLECTION METHODS**

The first phase of the research was a comprehensive literature review. This literature review provided the bulk of the information needed for addressing research questions at the national/state level, helped identify knowledge gaps to be addressed in the primary data collection, and provided an initial mapping of key stakeholders. An Annotated Bibliography was developed as a key deliverable tied to this literature review.

Following the literature review, the research team identified areas where the research would benefit from additional data collection or where more fine-grained, sub-national data was needed. These areas were then addressed in primary data collection, which consisted of household surveys, market

observations and market vendor surveys, key informant interviews (KIIs), and focus group discussions (FGDs). These data collection methods and the target respondents are described in the table below.

*Table 11: Summary of Data Collection Methods*

Method	Description	Target respondents
Household surveys	Household surveys within selected geographic areas sought to fill gaps in secondary data at the sub-national level. Surveys focused on food availability, access (including consumption), food production practices, water and sanitation, and nutrition (including child nutrition).	IDPs (70%) and host communities (30%), with a focus on targeting marginalized populations including women, youth, and a range of clans
Market observations and market vendor surveys	Data collectors conducted transect walks through markets in selected areas. Within markets, data collectors observed the presence or absence of selected commodities and prices of commodities. At regularly occurring intervals (every n <sup>th</sup> market stall, determined by market size), data collectors also conducted a brief survey with vendors to further understand prices, demand, supply, and other relevant issues.	Market vendors selling the full range of target commodities
KIIs	At the community level, KIIs were used to better understand dynamics influencing resilience and food and nutrition security, with a focus on dimensions of marginalization. At the regional and national levels, KIIs provided information on key stakeholders, systems related to resilience and food/nutrition security, and the context for food aid.	<ul style="list-style-type: none"> <li>• District administrators</li> <li>• Women and youth leaders</li> <li>• Business owners</li> <li>• Government officials</li> <li>• Members of development organizations</li> </ul>
FGDs	FGDs were used to better understand dynamics that influence resilience and food and nutrition security, including the intersection of resilience and food/nutrition security with dimensions of marginalization.	<ul style="list-style-type: none"> <li>• Community members (IDPs and host communities)</li> <li>• Members of youth organizations</li> <li>• Members of labor or agricultural organization</li> </ul>

## OPERATIONALIZATION OF PRIMARY DATA COLLECTION

### STAFFING OF DATA COLLECTION

Localization is at the core of Consilient’s approach to research and data collection. Our Somalia office is staffed with experienced national researchers, enumerators, fieldwork managers, and support staff with diverse backgrounds and a variety of regional, ethnic, and clan/tribal affiliations. Because of this, our full-time team was able to conduct and manage fieldwork across the AOI.

As the scope of the DRMS primary data collection was extensive, outside of our full-time staff, we additionally drew on our expansive network of enumerators and researchers. Because of Consilient's longstanding position in Somalia, we were able to draw from a pool of enumerators whom we have trained on data collection best practices and standards, who are familiar with our systems and procedures, and who have consistently met our quality standards. The diversity of our network also means that we were able to work with researchers who live in or have deep familial or ethnic ties to the areas we are working. Staffing with local context and dynamics in mind was critical for ensuring safe access, mobilizing respondents, and gathering information around sensitive topics around clan and marginalization. It also improved the quality of data, increased the efficiency of data collection, and helped ensure the safeguarding of both our researchers and respondents.

All teams of enumerators and qualitative researchers will be overseen by a Fieldwork Team Supervisor. During data collection, each Team Supervisor was responsible for overseeing teams of researchers/ enumerators and focused on providing in-field data quality assurance and feedback to the technical teams monitoring fieldwork from our Hargeisa offices. Team Supervisors conducted in-field accompaniments, coaching, recontacts, and verification of data throughout the entire research process. They were in regular contact with the Hargeisa office team to provide updates on progress, challenges, and issues emerging within the data collection locations. They also regularly updated the enumerators and researchers about instructions coming from the technical teams. As a result of this structure, we were able to respond to issues in real-time, maximizing our ability to catch mistakes as they happen and take corrective measures before researchers left a site.

### TRAINING

Training was held for Data Collection Team Supervisors in our offices in Hargeisa. Team Supervisors then spent two additional days training their teams of enumerators in each location in the AOI. Training covered the following topics:

- **Project introduction:** Project goals and objectives of data collection, including a review of research questions.
- **Ethics considerations and safety protocols:** Ethical considerations (described in the below section), physical safeguards for researchers and respondents, and the importance of informed consent.
- **Review of data collection instruments:** Use of mobile data collection software on smartphones and uploading data in the field. Teams also underwent a question-by-question review of data collection instruments. This process was used to familiarize teams with the tools and assure the quality of the tools, as logical and wording issues were flagged during review for correction.
- **Fieldwork planning and logistics:** Consilient developed and reviewed fieldwork plans with enumerator teams, including travel logistics, data collection timing, respondent contact procedures, security concerns, and risk mitigation plans, and expected communication plans.

### DATA QUALITY ASSURANCE

As a first step to producing high-quality data, all quantitative data was collected using digital data collection platforms with preventative measures scripted into the survey design to minimize errors. These included the following:

- Geographic information entered at the start of each tool was choice-filtered to prevent logically inconsistent responses.
- Survey timers in the quantitative tools checked for administration that is unusually fast or slow.
- Unusual or contradictory responses in surveys generated flags warning the enumerator that they may have entered a response incorrectly and prompting them to double-check responses entered are correct.

Reducing the potential number and severity of errors meant that quality assurance by team supervisors in the field and quality assurance officers was more straightforward and focused on problems that could not be “scripted out of the survey.”

Additionally, as needed, completed household survey observations were validated through a combination of accompaniments and recontacts. Validation of interviews involved verification that the interview was conducted and verification of item responses.

Data collection progress was monitored daily through the upload of data from enumerators at the end of each working day. Full data uploads allowed for the near real-time dashboarding of critical information on sample performance/management and data quality through Consilient's data flow, which pulled data from mobile data collection software Ona and ran it through an automated (Stata-based) quality control script, producing tables and graphs that summarize key indicators of progress and quality with automatic flagging of problematic interviews or enumerators and possible incorrect administration or bias. Each of these indicators and any flags were reviewed daily, with corrective actions (including feedback to enumerators or re-fielding of interviews) taken the following day where necessary.

Consilient also investigated questionnaire-specific issues and incorporated them into the data quality dashboard. For instance, key numeric questions were checked for digit preference, and all numeric questions were routinely checked for outliers or values that are unlikely, given the context. Other evaluation-critical survey items were checked daily for coherence and the plausibility of their response distributions. Enumerator-level averages were also calculated for critical measures, to identify any enumerator-specific issues in survey administration.

Finally, all qualitative data was recorded and submitted to Consilient by researchers along with interview notes. For each researcher, at least one qualitative interview recording was reviewed in full with feedback provided on administration of the discussion guide as well as guidance on improving researcher skills in probing for richer responses.

### **DATA SECURITY**

All data utilized, captured, or acquired for this assignment was securely stored and segregated from other company data. These procedures included segregated project folders used only in the execution of this work and which were only accessible by personnel engaged in the activities. Full data access was limited to project management staff and higher, to limit those who had access to the full range of data captured and utilized throughout the execution of the contract.

All data utilized under the initiative was stored on encrypted, password-protected, cloud-based servers and exchanged only through encrypted email with designated staff. At the field level, data collected on smartphones was instantly encrypted by the Ona mobile data collection software with end-to-end

encryption, making it inaccessible upon data capture completion. This means that if phones were to be lost, taken, or seized, any data that might be on the phone would be inaccessible to those in possession of the phone, as data is only again unencrypted upon receipt by the central Ona server. In addition, the transfer of field data from the phone to the server was also encrypted, limiting the ability to seize data in transit via the mobile network.

At the close of the project, Consilient will submit copies of all data obtained through the studies to LASER PULSE. Upon confirmation of receipt, Consilient will destroy any internal copies and data sources.

### **ETHICAL CONSIDERATIONS**

Consilient is fully cognizant of the need to uphold the highest standards of human subject protection and data privacy. Questionnaires were not anticipated to directly cause harm to respondents, given that the research themes in general are not particularly sensitive. Nonetheless, we acknowledge there remained a possibility for the data collection process itself to cause respondents distress, as specific questions might be sensitive, or that the leakage of respondents' data could lead to negative repercussions for them. To that end, the research team approached the DRMS with the ethical considerations below in mind. Our research protocols and data collection tools also underwent ethical review by a Somalia institutional review board, and data collection did not commence until ethical approval was granted to our research team.

**Deidentification of data:** While the data collection process was in-person and thus not anonymous, all data downloaded for analysis or shared with LASER PULSE and USAID was deidentified, meaning that personally identifiable information was separated from the dataset containing responses to questions. The two datasets are linked via numeric unique IDs for each respondent, but the separation into two datasets reduces the likelihood of attributing responses to individuals if the response dataset was accessed by unauthorized parties.

**Neutrality:** Researchers were instructed to accept all answers as legitimate and not show preference for a certain answer. We trained our researcher to focus on recording the responses of research participants without expressing their thoughts or opinions on a subject. We also trained our researchers to avoid demonstrating favoritism towards a participant or particular response.

**Privacy:** Consilient's researchers and data collectors aimed to collect data in a way that respects the privacy of the respondent during the process of data collection. Specifically, we aimed to interview respondents in an environment where they could be alone or where their responses were unlikely to be heard by other individuals in the vicinity. Respondents were only interviewed in public settings, or in settings where other individuals may hear responses if respondents themselves deemed such settings to be the most suitable for them.

**Free, informed, and prior consent:** Consilient ensured that researchers and data collectors understood that all respondents were voluntarily participating (i.e., researchers do not push participants for answers) and to accept when a participant refuses to answer a question. Participants were also made aware of their rights under the study, as well as informed about any associated risks and benefits (or lack thereof). We ensured that participants were fully informed about all procedures associated with the research, the nature of the study, and how the data would be used before consenting to participate. In



doing so, we ensured that enumerators and researchers obtained informed consent before proceeding with data collection.

**Conflict sensitivity:** Consilient promoted conflict sensitivity by planning research according to up-to-date risk assessments and conflict mapping conducted by in-house researchers before the start of primary data collection. These measures were maintained to avoid putting enumerators and/or respondents at risk. Furthermore, our field researchers, most of whom are from the districts where research would be undertaken, were deeply familiar with the relevant social and political dynamics and were sensitive to potential risks to respondents who participate in the study, such as if respondents from clans in conflict with each other were placed in the same FGD.

**ACHIEVED SAMPLE**

The below table shows the achieved and target samples for the quantitative data collection (household surveys, market observations, and market vendor surveys). One hundred percent of the target or higher was achieved for all surveys except market vendor surveys in Baidoa, where time constraints led to the achievement of 94 percent of the target sample size. Additional market observations were conducted in Baidoa and Kismayo, as livestock in these cities is predominantly sold in self-contained livestock markets which were added to the sample as data collection was ongoing. Significant additional household surveys were conducted in Kismayo to verify unusual patterns in data on food access, discussed further below under *Limitations*.

*Table 12: Achieved and Target Sample for Quantitative Data Collection*

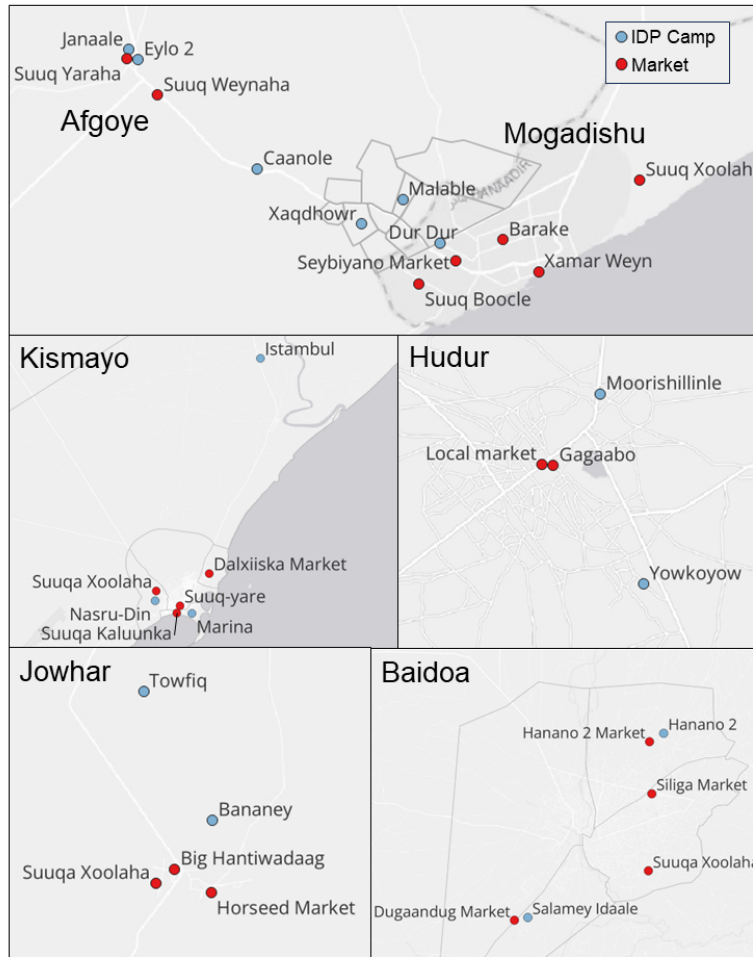
Location	Achieved Sample			Target Sample		
	Household Surveys	Market Observations	Vendor Surveys	Household Surveys	Market Observations	Vendor Surveys
Afgoye	230	2	36	230	2	36
Baidoa	230	4	51	230	3	54
Hudur	235	2	36	230	2	36
Jowhar	233	3	54	230	3	54
Kismayo	327	4	59	250	3	54
Mogadishu	355	5	120	355	5	120
<b>Total</b>	<b>1,610</b>	<b>20</b>	<b>356</b>	<b>1,525</b>	<b>18</b>	<b>354</b>

Household surveys achieved a 70.9 percent IDP and 29.1 percent host community division of respondents. Seventy-one percent of respondents were women and 29.1 percent men, while 33.9 percent were age 30 or younger (“youth”) and 66.1 percent were over the age of 30. In total, members of 61 clans were interviewed. The most common clans surveyed were the Rahanweyn – Mirifle (including 16 sub-clans) (40 percent of all respondents who did not decline to provide their clan), the Jareer (26 percent), the Rahanweyn – Digil (including 12 sub-clans) (10 percent), and the Hawiye (10 percent). In the context of IDP settlements, the concept of minority and majority clans is complex; for example, a clan may be the majority within a settlement but a marginalized minority within the broader area, or vice versa. As such, we do not categorize clans as minority or majority.

Thirty-nine percent of vendor surveys were conducted with sellers of livestock or fish and 61.2 percent with sellers of crops. For crop vendors, 96.3 percent reported that cowpeas were a common crop sold at their market, 90.4 percent maize, 90.4 percent sorghum, 78.9 percent rice, and 59.6 percent sesame.

For livestock/fish vendors, 69.6 percent reported that goats were commonly sold at their market, 68.1 percent sheep, 60.1 percent camels, and 25.4 percent fish.

Figure 17: Locations Visited for Quantitative Primary Data Collection



The locations of the IDP settlements (and surrounding host communities) and selected markets are shown in the figure below. The selection of IDP settlements sought to target a range of geographical locations to ensure that IDPs from different clans and places of origin were surveyed. Selection of markets predominantly focused on markets that IDPs commonly attend, but also sought to achieve full coverage of all target commodities. The selection process was guided by a district mapping exercise conducted before data collection by experienced researchers located in, and hailing from, each target area in the AOI. District mappings included information on market locations, primary commodities, and primary market users; IDP presence; and security and accessibility considerations.

For the qualitative data collection, a total of 78 KIIs and FGDs were conducted. This included the following:

*Table 9: Qualitative Data Collected for DRMS*

	Afgoye	Baidoa	Hudur	Jowhar	Kismayo	Mogadishu	Total
<b>KIIs</b>							
District administrators and government officials	2	3	1	3	3	3	15
Women leaders	1	1	2	2	1	1	8
Youth leaders	2	2	2	2	2	2	12
Business owners	2	2	1	2	2	2	11
Members of development orgs.	0	0	1	0	0	0	1
<b>FGDs</b>							
IDPs	2	3	2	2	2	2	13
Host community members	1	1	1	1	1	1	6
Youth organizations	1	1	1	1	1	1	6
Labor or agricultural organizations	1	1	1	1	1	1	6
<b>Total</b>	<b>12</b>	<b>14</b>	<b>12</b>	<b>14</b>	<b>13</b>	<b>13</b>	<b>78</b>

## ANALYSIS AND REPORTING

Analysis and reporting was structured to address the following agreed-upon research areas which were further elaborated in a detailed outline approved by LASER PULSE and USAID.

1. Demographic and social characteristics
  - a. Gender, clan, and other dynamics of social inclusion
  - b. Age and youth engagement
2. Food availability
  - a. Extent to which food is available in sufficient quantities and quality to meet local demand
    - i. Market structure, conduct, and performance for key food staples
    - ii. Functionality of markets for staple foods and livestock
  - b. The context for cash transfers, food vouchers, or small-scale local procurement
  - c. Range of feasible modality delivery mechanisms
3. Food access
  - a. Food basket profile
  - b. Access to markets and food
4. Food utilization and nutrition
  - a. Current, recent, and projected trends related to malnutrition, dietary diversity, child feeding, family planning, infectious disease, diarrhea, and water, sanitation, and hygiene (WASH) behavior knowledge and status
  - b. Structure and characteristics of systems that provide nutrition, family planning, and WASH-related resources and services, especially related to the surveillance, prevention, and treatment of malnutrition
5. Key stakeholders involved in resilience and food and nutrition security

Reporting adheres to all USAID reporting standards, including quality standards, branding/marketing guidelines, and accessibility (508 compliance).

This study was undertaken concurrently with a Political Economy Analysis which complements the DRMS at the level of implementation, delivery, content, and creation, but which encompasses a discrete area of inquiry. A separate report has been produced for the Political Economy Analysis.

## CHALLENGES AND LIMITATIONS

**IDP settlements in Afgoye:** Within Afgoye, the IDP settlement in Janaale was much smaller than expected; as a result, enumerators were unable to randomly select the full target sample size (80 households) within this settlement. As such, while 14 IDP households were surveyed in this settlement, the settlement was mostly replaced with the Eyllo 2 IDP settlement. However, midway through data collection, severe insecurity made Eyllo 2 inaccessible. As such, 40 surveys with IDPs were conducted in Eyllo 2 and the remaining 107 surveys with IDPs were conducted in the Canoolle settlement.

**Response patterns in Kismayo:** Within the Istambul area of Kismayo—one of the most outlying areas visited during data collection—both IDPs and host community members were far more likely to state that they “didn’t know” how much food (of various types) they tended to purchase during the summer months in comparison to the dry season (*jilaal-ka*). After following up with teams, it was determined that respondents were claiming they did not know because their levels of food insecurity were so high, and food access so tenuous, that they were uncomfortable making any claims about the reliability of food access in either the lean season or the summer months. While this is an interesting finding, suggesting extremely high levels of food insecurity in the area around Istambul, it did not provide sufficient data on seasonal food availability in Kismayo. As such, 77 additional surveys were conducted in Kismayo to provide supplementary data for this research area.

**Prices of livestock and fish:** Prices of livestock and fish are heavily dependent upon a wide range of factors, some of which are very difficult to objectively measure. These factors can include the quality of the livestock/fish, size, gender, age, and species (for fish), as well as supply and demand levels. While efforts were taken to standardize price measurements by, for example, asking for prices for an adult female of average quality and size, respondents may interpret “average quality” and “average size” differently depending on their location. As such, price measurements are inherently approximations.

**Temporal variations:** Prices, supply, and demand tend to vary seasonally and with shocks such as floods, drought, or conflicts. Because shocks can occur frequently within Somalia, market dynamics can fluctuate rapidly and significantly on relatively short periods (as short as weekly). Because primary data collection took place over an approximately one-month period and is cross-sectional, rather than longitudinal, we are unable to provide primary data on market trends or fluctuations and their correlation with seasons or shocks. Where possible, this limitation is addressed through the use of secondary data.

**Topic sensitivity:** While the DRMS generally addresses unsensitive topics, issues such as potential collusion in price-setting between wholesalers, importers, government officials, and other coordinating bodies as well as unofficial taxation by al-Shabaab or government officials may be highly sensitive. As such, we may underestimate the extent to which such behaviors occur and their impact on markets.

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