Joint Markets and Supply Chain Update | 10 - 17 December 2022

**KEY HIGHLIGHTS**

**Prices:** Overall, prices of imported food items either decreased or remained the same compared to the previous week in all the regions except in Galmudug where the price of wheat flour showed an increase of 6%/kg. In Mogadishu, the price of wheat flour and sugar decreased by 11% and 6% respectively, per kg, and the price of vegetable oil dropped by 6%/litre. In Hirshabelle, pasta, rice, and wheat flour decreased by 6%, 4%, and 3%, respectively, per kg, also vegetable oil decreased by 3%/litre. In Southwest, rice, sugar, wheat flour, and pasta decreased by 8%, 6%, 5%, and 1%, respectively, per kg and vegetable oil dropped by 6%/litre, compared to the previous week.

Local cereal prices exhibited mixed trends compared to last week. Red sorghum increased by 6% and 3% in Galmudug, and Hirshabelle, respectively/kg, but decreased in Southwest by 3%/kg. The price of white maize decreased in Southwest, Hirshabelle, and Galmudug by 7%, 6%, and 5%, respectively, per kg compared to the previous week.

Camel milk prices slightly dropped in both Hirshabelle and Galmudug by 3%/litre and Southwest by 2%/litre but remained the same in all the other regions compared to the previous week.

**Availability:** Sufficient stocks of key food items were reported in most markets across the states that can cover approximately two weeks of current demand.

**Supply Resilience:** Generally, supply chain resilience is good across the regions throughout the country except in locations controlled by insurgents such as Qansaxdhere Wajid and Hudur. Despite accessibility issues related to insecurity in these locations, business communities are getting supplies through sneaking to ensure the availability of key items in the markets.

**Trade logistics:** Most roads are accessible and transport services function smoothly except for some supply routes in Galmudug, where the lead time may get extended compared to normal times due to some natural sand piles along the road. Currently, in Puntland, under repair. Once the supply corridor is complete, lead time is expected to reduce and, subsequently, transport costs should fall. Further, most supply corridors linked to Kismayu town are under maintenance, once complete, transport services from Kismayo port to key markets will also improve further. The road linking Bossaso and Taleex is at poor condition and transport trucks are currently using the Bossaso-Dhahar-Sarmanyo-Hudun-Arooleey-Taleh route. Given this alternate route is longer, the lead time has increased from 13 hours to 48 hours. However, this increase of lead time has not yet impacted on the food prices and the availability of commodities in the Taleex market.

**Food Items Assortment:** Overall, a wide range of commodities was available in all the markets. Items such as rice, wheat flour, sugar, vegetable oil, pasta, red sorghum, maize, beans, dates, milk powder, fresh milk, goat meat, camel meat, fish, fresh fruits, and vegetables were readily available. In addition, there was an assortment of different brands of key imported commodities such as rice.

**IMPLICATIONS ON FOOD SECURITY**

- Access to imported food items will continue to improve in Mogadishu, Hirshabelle, Galmudug, and Southwest, mainly due to decreasing retail prices. In addition, in Hirshabelle and Southwest regions, the pastoral households that depend on small ruminants will improve their purchasing power resulting from the increased prices of goats. In Hirshabelle and Southwest, the Terms of Trade (ToT) for Goat and wheat flour increased by 13% and 6% respectively, compared to the previous week.

- Similarly, in Hirshabelle and Galmudug, price decreases of white maize and camel milk will positively affect the households’ energy and protein-rich food intake.

- In Taleex market, the lead time from the upstream market of Bossaso has tripled. Despite the sufficient availability of essential food commodities reported this week, the increased lead time may impact market functionality; hence WFP will monitor the Taleex market closely.

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