

Djibouti Market Assessment August 2016

SURVEYED MARKET MAPPING



Surveyed Markets :

- ALI SABIEH
- ALI ADDEH
- ALI ADDEH CAMP
- HOLLHOLL
- HOLLHOLL CAMP
- OBOCK
- MARKAZI CAMP



Data collected in October 2015

FEASIBILITY STUDY FOR CASH
TRANSFER INCREASE IN ALI
SABIEH CAMPS
AND
INTRODUCTION OF CASH
TRANSFER IN MARKAZI CAMP
IN OBOCK



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Executive Summary

Objectives and methodology

This report presents the findings of a market assessment conducted by WFP and partners¹ during the last quarter of 2015 to determine the feasibility of cash based transfers (CBT) to refugees living in camps in Djibouti. Specifically, it aimed to: i) determine if the cash transfer implemented in Ali Addeh and Hol-Hol camps should be continued, and if the value of transfers should be increased; and ii) determine if cash transfers should be initiated in Markazi camp hosting Yemeni refugees.

The assessment used standard WFP market assessment methodology. Fundamentally, this seeks to establish if market conditions are conducive to assure consistent food availability and stable prices for key food commodities to guarantee cost effective access. It entailed secondary and primary data analyses.

The methodology used to gather this information included secondary data reviews; key informant interviews; focus group discussions; and the administration of a trader survey

¹ This market survey was conducted in close collaboration with ONARS, UNHCR, NRC, DRC and WFP.

questionnaire which also included observations. The trader survey questionnaire, a key element of this assessment, was administered by 18 enumerators and 3 supervisors in October 2015 covering seven (7) markets around the three refugee camps. Data was captured using Open Data Kit (ODK) apps for mobile data collection on android tablets. Some 213 traders were interviewed using a structured questionnaire that covered: trader profile; commodities, sources and stocks; supply and demand conditions; price conditions; constraints to trader capacity to expand supply; and trading in refugee camps.

Main Conclusions

- I. There was adequate supply of food commodities across the markets that were assessed. This was underpinned by a good supply network between these markets and the main hub markets in Djibouti and Ali Sabieh. Although traders have low capital base and limited access to credit, they generally have access to commodity credit from their main suppliers. Most of the traders purchase the supplies locally and therefore do not face significant transport challenges. Overall, traders would be able to expand their supply – with higher likelihood in Ali Addeh, followed by Hol-Hol and Obock. Moreover, there was a significant increase in the number of traders in Ali Addeh and Hol-Hol since the introduction of CBT in 2014.
- II. Food prices vary across these markets along regional trends, remaining relatively stable on markets supplying Ali Addeh and Hol-Hol camps, but significantly higher in Obock which are expected to supply Markazi camp. The generally expected increase in supply (above) will contribute to maintaining this trend across markets, build on the experience of CBT already implemented in two of the camps. However, the analyses do not provide sufficient evidence that price levels in Obock and Markazi camp will decline below their relatively high and rising levels.
- III. It was established that there is generally a harmonious co-existence between traders and refugees across all the markets. The findings of the focus group discussions with several groups across all camps corroborate the findings of the trader survey, pointing to the lack of any significant protection issues.
- IV. The evidence from reviews of the CBT experiences in Ali Addeh and Hol-Hol camps reveal that it has been a success and enjoys the support of both refugees and traders. Consequently there is strong support for expansion of CBT in these camps; this will benefit from and stand guided by the good track record.
- V. Funding availability will ultimately be the key determinant of CBT. It is thus of critical importance that the final decision to implement CBT be guided by a considered long view of assured resource commitments from donor.

Main Recommendation

- I. It is recommended that cash based transfers should be continued in Ali Addeh and Hol-Hol refugee camps and the transfer value should also be increased, but gradually to enable market to adjust. The increase should start with 50 percent increase of the current transfer value, and raised to 75 and 100 percent. This should be informed by market monitoring and by sustained funding availability.
- II. The market conditions in Obock and Markazi camp do not currently support CBT in Markazi camp. This is mainly due to relatively high and increasing prices in the region over the past six months, notwithstanding the good supply connection with Djibouti and high trader numbers. However, it is suggested that the recommendation be reviewed after 6 months, informed by the findings of the ongoing market monitoring.
- III. High seasonal patterns of food availability and prices exists across most markets and this should be taken into consideration in setting transfer values. This is due to the fact that a constant value could lead to beneficiaries purchasing less quantities of commodities during period of high prices and vice-versa. One option to remedy the situation would be by increasing cash values during period of high prices.
- IV. It is strongly recommended that WFP and partners continue to monitor markets, focusing on commodity prices and supply conditions on key markets accessed by refugees. This will help to support future decisions, including adjusting transfer values.
- V. Consideration should be given to supporting market development initiative in the refugee camps. This could include support towards addressing the main constraints (e.g. capital and storage) that traders have identified. This will contribute to higher market capacity and efficiency, thereby the success of CBT. It could also lead to building livelihood and independence from food assistance in the long-run.

1. Introduction

The World Food Programme in Djibouti has been implementing combined cash and food assistance transfers to refugees in Ali Addeh and Hol-Hol refugee camps in Ali Sabieh region of Djibouti since 2014. This decision was informed by the Food Security, Livelihood and Market Study conducted by WFP in collaboration with UNHCR and ONARS in late 2013 and Joint Assessment Mission (JAM) conducted by WFP, UNHCR, ONARS and other partners during the same year. Since October 2014, approximately 13,000 beneficiaries (approximately 3,880 households) have been supported, each individual receiving fixed cash amount of DJF500 (\$2.82) per month. The transfer goes directly to the Head of Household and is intended to meet household food needs. At the start of the cash programme, thirty eight (38) traders (retailers and wholesalers) were identified through a market Feasibility Study in the refugee settlements (Ali Addeh and Hol-Hol) to respond to beneficiaries' food and non-food requirements. The findings from recent Post Distribution Monitoring (PDM), Focus Group Discussion and Protection Assessment of Djibouti Mixed Modality Cash/Food Pilot (May 2015) support the continuity of the dual cash transfer / in-kind assistance approach in the two camps. Refugees have also expressed a strong desire for increasing the cash amounts in order to access more diversified diet and meal.

Since May 2015, the Obock region has received up to 5,000 refugees fleeing the conflict in Yemen, most of them accommodated in Markazi refugee camp in the outskirts of Obock city. Most of the refugees came from coastal zones including Bab El Mandeb and Aden. The registered refugees receive food and nutrition assistance from the UN, NGOs, Civil society and International foundations under the protection of UNHCR and ONARS (National counterpart). The assistance provided by multiplicity of actors remains unstructured and consist mainly of basic rations of cereals, pulses, oil and sugar. FCG and PDM reports have revealed that the refugees living in Markazi encounter some difficulty in accessing nutritious foods and are having poor diet diversity. As result of this situation, the SENS survey conducted in December 2015 in the Markazi camp found out that the GAM rate is 25.7%. This reflects the general context of Obock region which has high prevalence of food insecurity and poor nutrition status, particularly among children under five years of age. The question is whether the introduction of cash transfer similar to those implemented in Ali Addeh and Hol-Hol would lead to dietary diversity and improve the food security situation of these refugees.

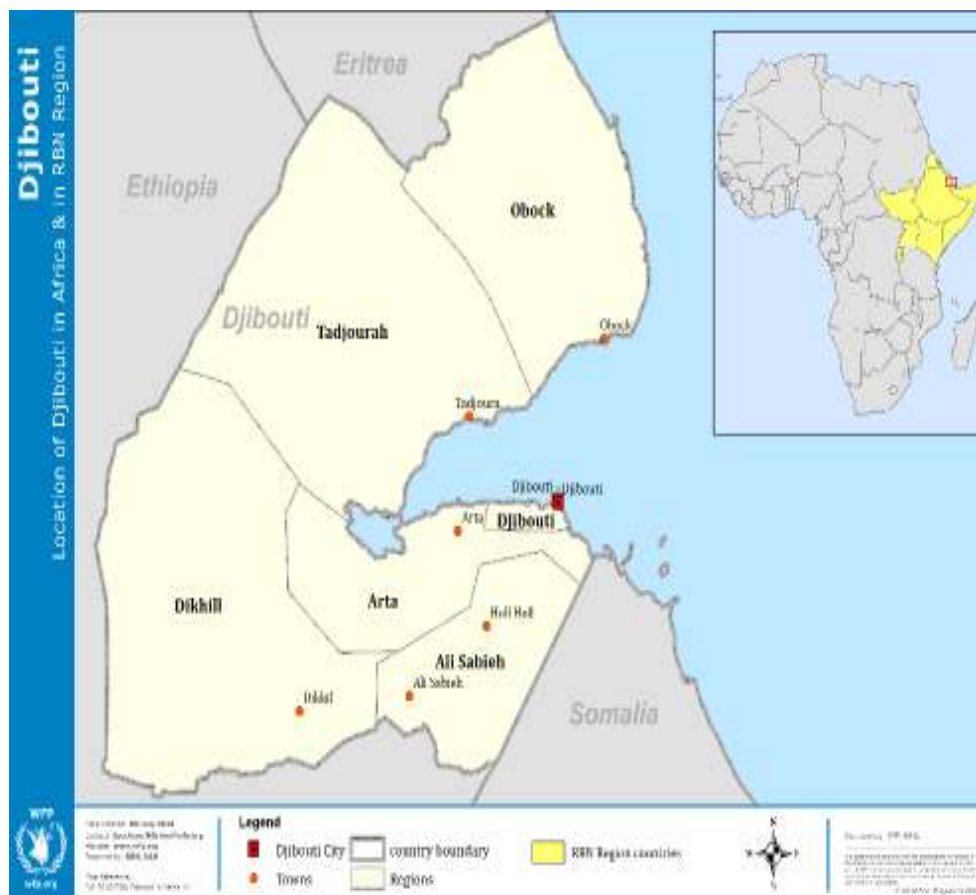
It was in this these contexts that a market assessment was considered by WFP and partners. The purpose of the market assessment was to determine if market conditions were conducive for the continuation of CBT in Ali Addeh Camp and Hol-Hol Camp, and its introduction in Markazi Camp. In addition, it was also intended to establish if it would be feasible to increase the value of the cash transfer in the two camps where CBT was already being implemented. The need to conduct a market assessment to inform CBT is in line with WFP's corporate guidelines, to ensure that the underlying conditions are suitable to support CBT.

2. Background

2.1 Socio-Economic Background

Situated in the Horn of Africa, Djibouti is bordered by the Red Sea and the Gulf of Aden to the east, Eritrea to the north, Ethiopia to the west and south and Somalia to the southeast (Figure 1). It attained political independence from France on 27 June 1977 following an independence referendum held in the French Territory of the Afars and the Issas on 8 May 1977 alongside elections for a Constituent Assembly. Djibouti is member of several international and regional economic groupings including the African Union, Arab League, La Francophonie, the United Nations and the Intergovernmental Agency for Development (IGAD). The headquarters of IGAD, which is a development association of seven East African countries, is in fact in Djibouti City.

Figure 1: Political Map of Djibouti showing Regions



Djibouti's location on a globally important shipping route has made it of strategic political and military importance, and hosts several foreign military bases. The Port of Djibouti is the country's

principal asset and main source of income and foreign exchange. It serves as the sole gateway for Ethiopia's imports and exports and as key humanitarian relief corridor supplying Djibouti, Ethiopia and South Sudan. A United Nation's Humanitarian Response Depot was recently established in the capital.

2.2 Food Security Situation

The country is poorly endowed with natural resources. With poor soil and agro-climatic conditions, it does not support arable agriculture, but some livestock of small ruminants, camels ... As a result, the country is almost entirely dependent on import for its food requirements, except for some meat, fish and limited amount of vegetables that are locally produced. The main food commodities considered as its staples include rice, pasta, wheat flour, sugar, cooking oil etc., and are imported in bulk by 3-4 large importers. They are distributed through two dozen large wholesalers, who in turn supply other wholesalers and retailers in Djibouti and other parts of the country. Most vegetables and some pulses and cereals are imported from Ethiopia.

These food commodities tend to be widely available on markets throughout the year. Most cereal imports into the country come from major rice and wheat producing countries of Asia, Europe and the Americas. Several canned and other processed foods commodities such as milk, beans, fish and fruit juices are also imported in significant quantities from wide ranging sources. The country's requirements for fresh foods such as vegetables and fruits come predominantly from Ethiopia with a seasonal variability.

Food security situation in the country is generally poor outside Djibouti city reflecting the hostile physical and climatic conditions and difficult physical and economic access to significant numbers of the population living in other provinces. But the country also hosts over 15,000 refugees in three camps that are located in some of the poorest provinces. These include Ali Addeh and Hol-Hol camps in Ali Sabieh region that host largely Somalis and some Ethiopians and Eritreans; and Markazi Camp on the outskirts of Obock city in Obock province hosts Yemeni refugees.

Extreme weather conditions and scarce water resources and biomass are key problems for Djibouti. Traditionally these challenges have been addressed by rural communities through nomadic and semi-sedentary pastoralist livelihoods. However, as adequately captured in the CFSVA² which is the first comprehensive food security assessment conducted by WFP in Djibouti. The study covered the main towns of Djibouti and Balbala, regional urban centers, and the five regional rural areas. The assessment was conducted between May and September 2014, with data collection completed by end of June 2014. Almost 60 percent of food insecure households live in rural areas. Around 35 percent of rural households live in moderate food insecurity and 12 percent in severe food insecurity. In urban areas, 7.4 percent of households are moderately (6.5 percent) or severely food insecure (0.9 percent). At least 11.5 percent of the households residing in the main towns in the five regions outside the capital are food insecure. This is higher compared to Djibouti City (6.4 percent), but remains significantly below those observed in the

² CFSVA, Comprehensive Food Security and Vulnerability Assessment conducted in 2014 at national level by WFP.

respective rural areas. The region with the highest rate of food insecurity was Obock (58.1 percent of households), followed by Dikhil (42.3 percent), Arta (32.5 percent), Tadjoura (25.6 percent) and Ali Sabieh (23.8 percent). These areas have also the highest rates of malnutrition according to the SMART of 2013.

Shifting the focus to the 2nd administrative level, the highest proportion of food insecure households was observed in the rural sub-districts of Alaili-Dada (72 percent) and the peri-urban area of Obock district (64 percent), the rural sub-districts of Yoboki (Dikhil region) (61 percent), Ali Addeh where the biggest refugees camp is located (Ali Sabieh region) (62 percent) and Dora (Tadjourah region) (50 percent). In Djibouti urban, the highest prevalence of food insecurity was observed in the 2nd urban sub-district of the commune of Boulaos (10%) and the 5th of the commune of Balbala (8%). The increasing scarcity of these resources and chronic drought over the last six years have fueled urbanization. In turn, it increased the state of sedentary life and triggered a rapid evolution of people's livelihoods, traditional adaptation mechanisms and sources of income. The food security assessments conducted by WFP in Djibouti (EFSA urban November 2012, EFSA rural May-Aug 2013, FSMS September 2013), show that the food security situation in the country remains very critical. It was estimated that around 135,000 people were severely to moderately food insecure and therefore required humanitarian assistance. The rural EFSA 2013 estimated that 67% of around 150,000 of the rural population were severely to moderately food insecure (around 82,000 people). Ali Sabieh region where Ali Addeh and Hol-Hol refugee camps are located had the highest percentage (84.9%) of severe to moderate food insecure households and classified as IPC level 3 "Crisis" during 2015 IPC Rural Analysis.

Notwithstanding the high food insecurity and hostile environment, Djibouti has seen the influx of refugees from neighboring countries, the most recent from Yemen – largely driven by conflicts and political unrests. Djibouti now hosts over 15,000 refugees in the three camps of Ali Addeh, Hol-Hol and Markazi camps.

The 2013 comprehensive Markets and Livelihoods Assessment that focused on refugees living in Ali Addeh and Hol-Hol refugee camps was a key input into the 2013 Joint Assessment Mission (JAM). The findings were the basis for the introduction of cash transfers in the two refugee camps.

3.0. Objectives and Methodology

3.1 Objectives

The objective of the market assessment was to inform the feasibility of CBT to refugees living in camps in Djibouti. Specifically, the market assessment aimed to: i) determine whether the existing cash transfer in Ali Addeh and Hol-Hol camps should be continued and if the current amount of cash transfer should be increased; and ii) determine if cash transfer would be feasible and appropriate as alternate transfer modality for the refugees in Markazi camp.

In line with WFP's standard framework for market assessment to specifically sought to:

- i. Map the market supply chains for food commodities of food security significance to the refugees; analyze historic and current availability of staple and fresh food commodities, including any changes and patterns of seasonality; the market environment in which food trade takes place, including government policies and regulations, socio-political situation, security, road and transport infrastructure, etc.;
- ii. Identify the main actors and institutions relevant to supply chains, any barriers and constraints to enter trade or maintain and increase supply, analyze market conduct - i.e. price setting behaviors, weights and standards, transparency of transactions, competition and any corruptive behavior;
- iii. Identify market outcomes including seasonality and volatility of prices, market integration with supply sources (including physical flows), the potential for markets to respond to demand increases considering storage facilities, duration of stocks, replenishment lead-time, and expectation of price changes due to increase in market demand;
- iv. Collect prices for developing scenarios for different food commodity in potential food baskets and transfers values, and for cost efficiency/effectiveness analysis, that can inform decisions to switch between transfer modalities or food baskets depending on seasons;
- v. Analyze the demand of refugees: their physical and economic access to local markets (including inflation patterns of food and non-food commodities, households' purchasing power, livelihood and market participation behaviors, self-sufficiency and resilience statuses, preferences, and possible protection and gender concerns in terms of access, safety, impact on intra-household dynamics and the dynamic between the refugees and the host community);
- vi. Analyze the capacity of traders to meet increased demand emanating from cash transfers and identify any potential bottlenecks for traders; formulate and map recommendations on i) feasibility to increase cash transfer values in Ali Addeh and Hol-Hol camps where CBT is being implemented; ii) determine the feasibility of CBT in Markazi Camp, ii) determine

the periods of the year where there could be potential challenges to supporting CBT and where in-kind assistance might be more favorable, and iv) identify means to address any identified bottlenecks for traders to meet increased demand and strengthen supply chains.

- vii. Identify protection and gender issues for traders and beneficiaries (security risks on route to, at and from market, who is most vulnerable, what can be done to mitigate those risks). Identify any obstacles for women and vulnerable individuals or ethnic/language minorities to access markets. Identify any risks of social exclusion or ethnic tensions between beneficiaries and traders or any restrictions on movement.

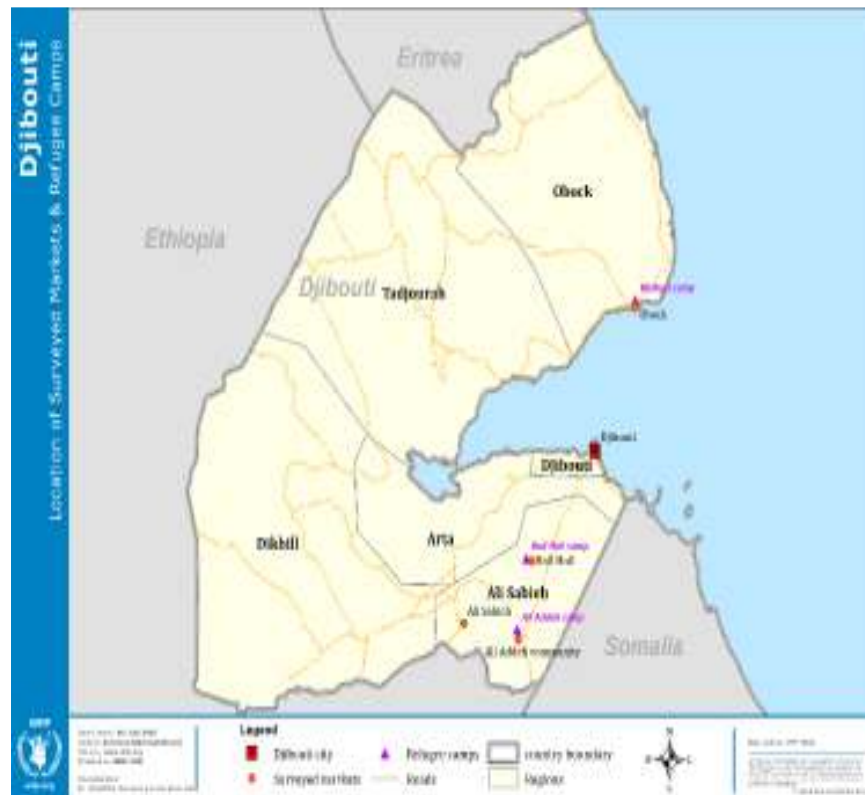
3.2. Methodology

The market assessment bases its findings on secondary and primary data analyses. The methodology used to gather this information included: secondary data reviews; key informant interviews; focus group discussions; trader survey using structured questionnaire; and market observations.

The main secondary reports reviewed were from various sources and included: the Market Study of November 2013; market and price information from WFP FAM, WFP PDM monthly reports; Household perception in Ali Addeh and Hol-Hol; Market Feasibility Study for Cash & Vouchers of September 2014; the CFSVA, FSMS, Nutrition survey and JAM reports of 2013; Protection Assessment of the Djibouti Mixed Modality Cash/Food Pilot in May 2015 among others. The reviews provided useful background contexts and information base for interpreting the findings of the analyses. The process of secondary data collection also entailed web-searches and meetings with key institutions. Monthly food price data collected by WFP and data from government sources were used to analyse price trends, seasonality and integration of markets regarded important for the supply chains of main food commodities.

The collection of primary data was through the administration of a trader survey questionnaire. This was undertaken by a team of 18 enumerators and 3 supervisors who covered the seven (7) in and around the three refugee camps (see Figure 2). Data was collected using ODK apps for mobile data collection using android tablets. A total of 213 traders were interviewed using a structured questionnaire that covered issues that included: trader profiles; commodities, their sources and stocks; market supply and demand conditions; market price conditions; main constraints to traders' capacity to trade and increase supply looking at storage, transport, finance, etc.; and the opportunities to trade in refugee camps.

Figure 2: Map of Djibouti with Markets Surveyed



Key informant interviews and focus group discussions were held with beneficiaries (by gender and by ethnics or language groups) and others institutions including HCR (Field team), NGOs (NRC, DRC, AHA, UNFD, etc.) in both field and Djibouti. Djibouti based interviews involved policy makers in relevant government departments (Ministry of Trades) and wholesalers.

Trader selection were through purposive sampling covering primarily the key commodities (sorghum, beans, rice, and cooking oil, sugar ...), while also ensuring coverage of other commodities including vegetables, meats, fish and fruits. The data was recorded in Personal Digital Assistants (PDA). This increased the speed of data collection, the accuracy of data and timeliness of data analysis. Additionally, market observations were also taken that provided some valuable insights on the breadth of commodities traded and the dynamics of trade in each market. Prior to the data collection, training was provided to the enumerators and supervisors on key concepts and purpose of the assessment and on the trader questionnaire and its administration. The training included field testing of the questionnaire. Finally, the data were analysed with MS Excel 2013 and SPSS 20.

4. Main Findings

4.1 Trader Characteristics

A total of 213 traders were surveyed in seven market. As Table 1 shows, these included three markets in refugee camps (Camp Markazi, Camp Hol-Hol and Camp Ali Addeh); three in towns or communities close to the refugee camps (Ali Addeh, Hol-Hol and Obock); and one market in Ali Sabieh town further from the camps. The largest number of traders were in Ali Sabieh (99) representing about 46.5 percent of the sample; this was followed by Obock Town (27.7 percent); Camp Ali Addeh (16 percent) and Camp Hol-Hol (4.7 percent). Camp Markazi had the least number with only one trader (0.5 percent). About one fifth of the traders interviewed (or 23 percent) were situated in markets within the camps with 77 percent in the towns.

Table 1: Location of the buisness

	Frequency	Percentage
Obock ville	59	27.7
Camp Markazi	1	0.5
Ali Sabieh	99	46.5
Camp Holl Holl	10	4.7
Camp Ali Addeh	34	16
Ali Addeh Host	6	2.8
Holl Holl Host	4	1.9
Total	213	100

Most of the traders (186 or 87 percent) were retailers compared with 20 (10 percent) mixed wholesale-retailers; there was only one (1) fulltime wholesaler and the remainder were collectors. Majority of these traders (171 or 80 percent) traded in general food commodities (cereals, legumes, cooking oils and sugar); 17 (8 percent) traded vegetables; 15 (7 percent) traded meats, and about 4 percent traded fish.

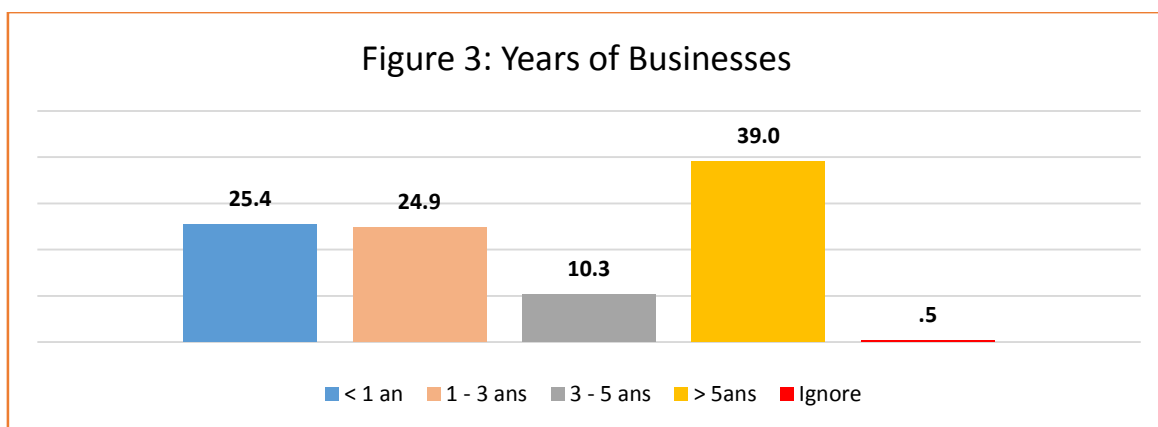
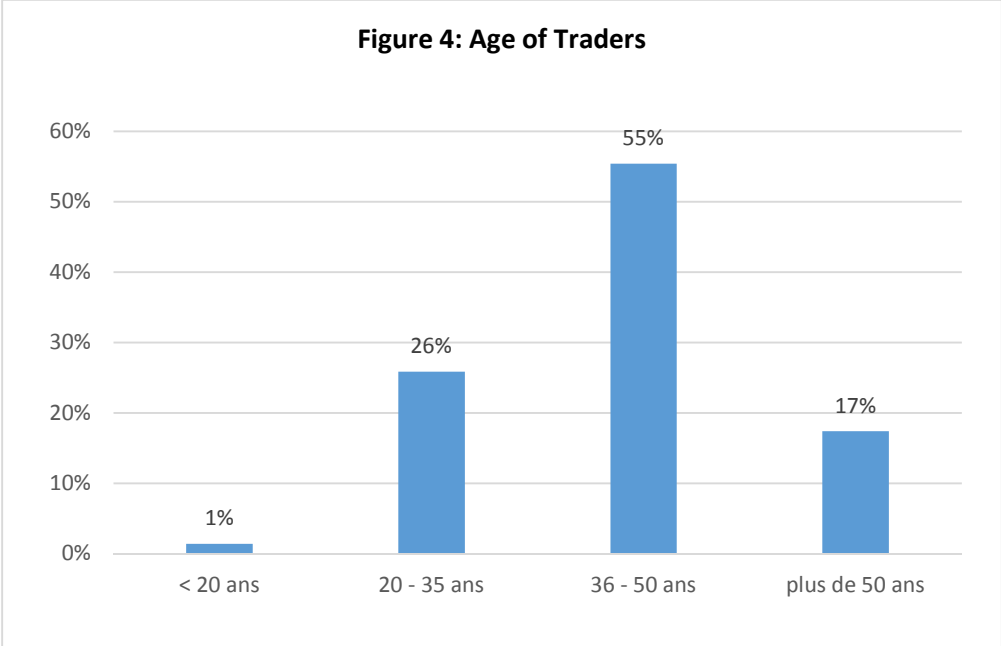


Figure 3 shows that most of the businesses (39 percent) were more than five years old, while 10 percent were 3-5 years old, 25 percent were 1-3 years old and another 25 percent were under 1 year old. The overall picture is that majority of the businesses were well established.

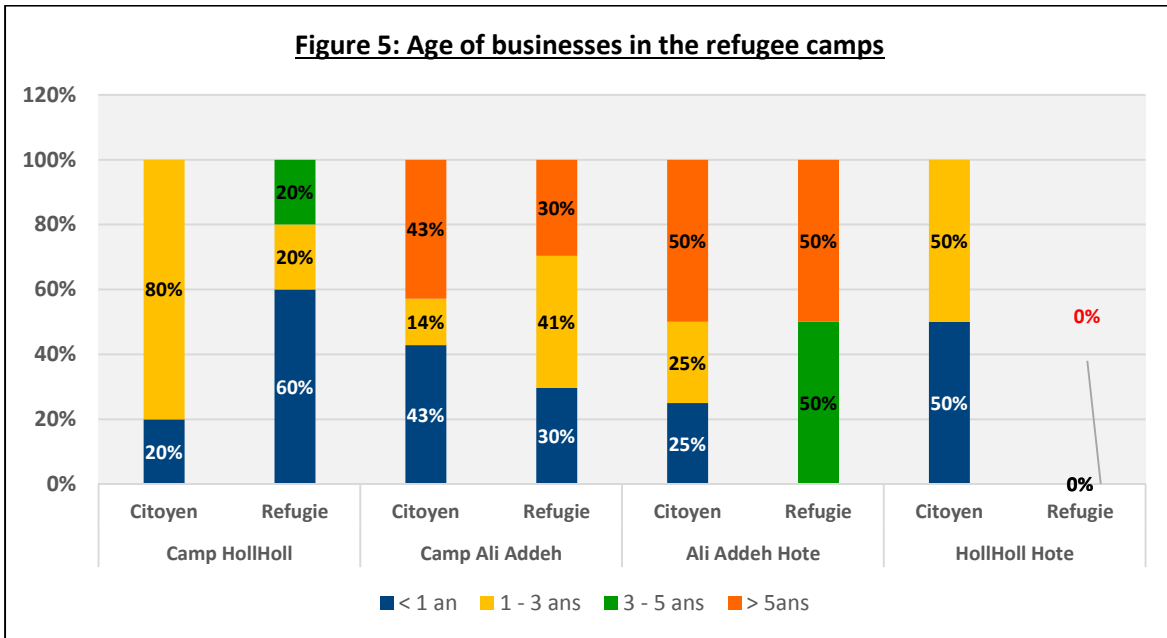
More than three quarters of the persons interviewed (76 percent) were owners of the business, 14 percent were spouses and 10 percent were workers. About 55 percent of the traders were males compared with 45 percent females. Majority of the traders (55 percent) were in the age group of 36-50 years, followed by 26 percent who were 20-35 years, 17 percent who were above 50 years old and only 1 percent who were under 20 years old (see Figure 4).



A vast majority of the traders (178 or 84 percent) were Djibouti nationals who were mostly trading in main town markets. The remaining 35 traders were non-nationals (refugees and asylum seekers) who represented the remaining 16 percent of the traders surveyed. Majority of these refugee traders mainly traded in Ali Addeh and Hol-Hol camps.

The analysis of the markets in the three refugee camps reveals that over the past one year, there has been a significant increase in the number of businesses (under one year). This involved both refugee traders and Djiboutians. In Hol-Hol Camp, there was 20 percent increase in Djiboutian traders compared with 60 percent in the case of refugee traders. In Ali Addeh Camp, the corresponding increases were 43 percent and 30 percent, respectively. There were similarly 25 percent increase in the number of Djiboutian traders in Ali Addeh host community and 50 percent in Hol-Hol host community market. All of this show that the introduction of CBT in the two refugee camps have led to significant increase in the number of traders within both the refugee markets and host community markets. A similar analysis by market for all markets also shows

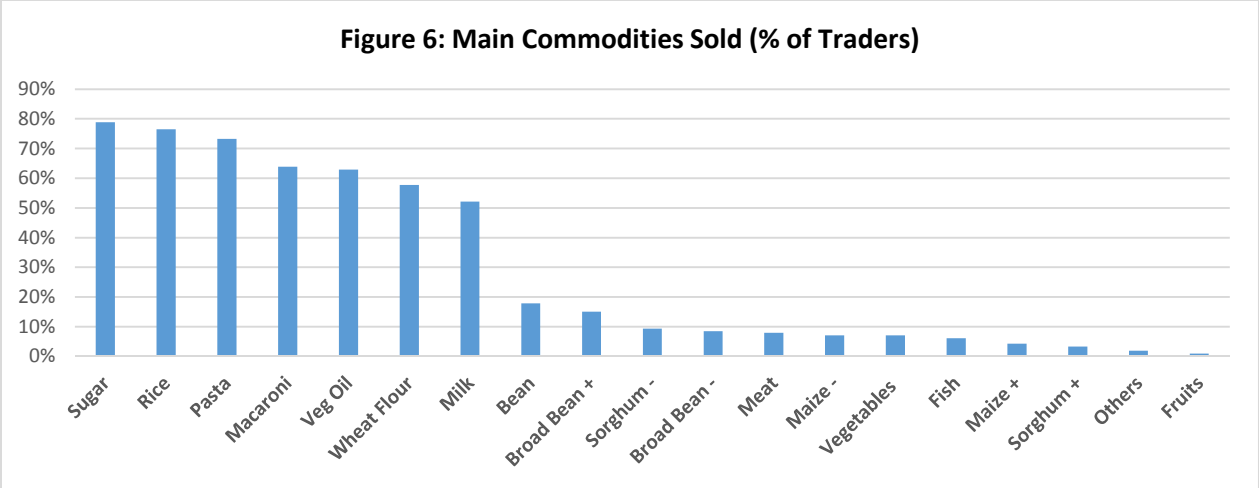
that there was 23 percent of traders who established businesses within the past year, most likely reflecting the impact of the increased demand in the nearby camps.



The analysis also reveals that for 72 percent of the traders, this represents their main livelihood activity. Further, a vast majority of 94 percent of the traders said they opened their businesses for 5-7 days per week. These basic facts provide strong assurances of constant supply of food commodities to meet any increase in demand.

4.2 Main Commodities, Sources and Stocks

Main commodities sold on the markets are presented in Figure 6. This is based on the percentage total of traders reporting sales of each commodity as first, second or third important commodity. Sugar was rated the most traded with 79 percent of traders reporting, closely followed by rice (77 percent) and spaghetti (73 percent). The next tier consisted of macaroni (64 percent), vegetable oil (63 percent), wheat flour (58 percent) and milk (52 percent). Beans were traded by 18 percent of traders and the rest of the commodities including sorghum, meat, maize, fish, vegetables and fruits were traded by less than 10 percent of the traders that participated in the survey.



A ranking based on the traders reporting commodities as their first important commodity put sugar again as the number one traded commodity, followed by wheat flour and rice in third place. They were followed by spaghetti, vegetable oil, meat, vegetables, macaroni, milk and fish in that order.

Figure 7 shows that Djibouti City was a major source of food commodities, with largest shares from wholesalers followed by traders in the main markets and importers. This was particularly the case for the main food commodities including sugar, rice, wheat flour, spaghetti, macaroni, milk and vegetable oil. However, most of the traders appear to indicate that they obtained most of their commodities from local wholesalers and mixed wholesale-retailers operating in the markets and from major regional markets such as Ali Sabieh and Obock.

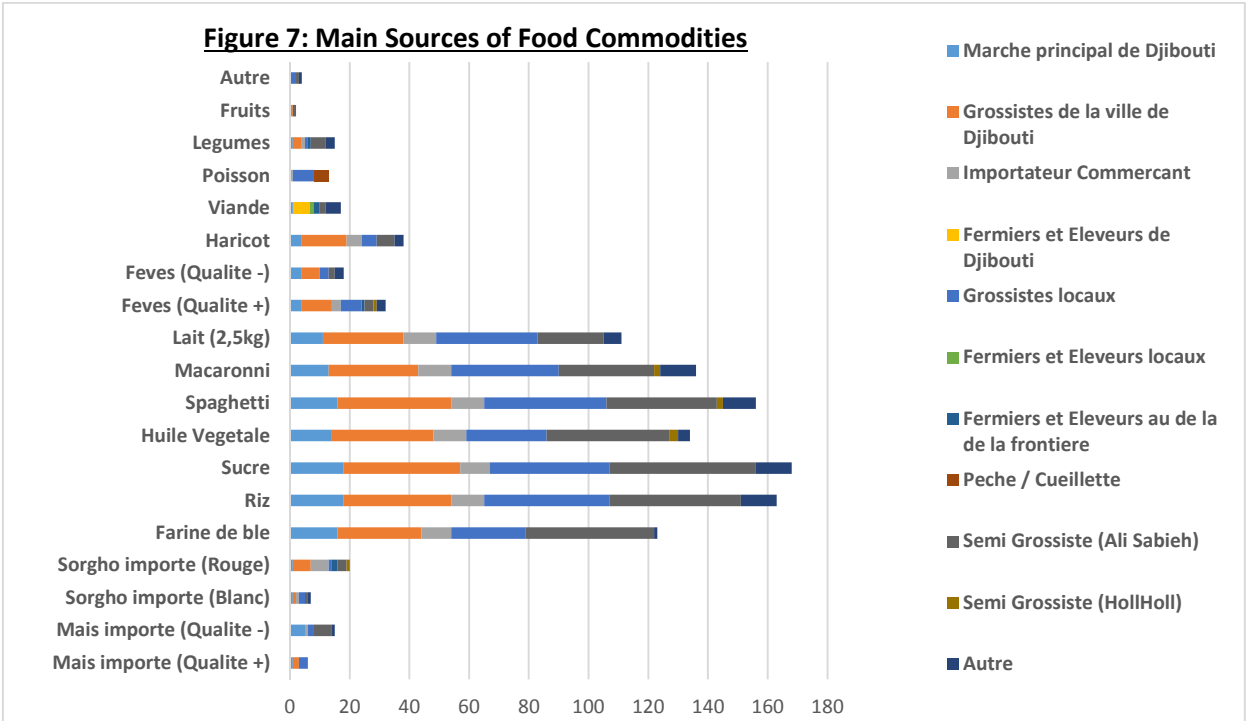


Table 2 shows that on average, most of the trader do not travel very far to purchase their commodities. More than 60 percent of all traders purchase commodities within 5 km; this is in contrast to 28 percent who purchase more than 50 km away. The main exceptions are Obock and Hol-Hol host community markets where more than 50 percent of the traders purchase their food commodities more than 50 km away, which in this case implies from Djibouti City. Obock city has good seasonal transport connection (ferry-boat) with Djibouti while the main source market for Hol-Hol is Djibouti. By contrast, 26-30 percent of the traders in Ali Addeh and Ali Sabieh markets purchase their commodities locally within 1 km of their trading posts; with less than one quarter of traders on these markets purchasing more than 50 km away.

Table 2: Distance to source of commodities

Market / Distance	< 1km	1 - 2km	2 - 5km	5 - 10km	11 - 25km	26 - 50km	> 50km	Total
Obock ville	22.0%	11.9%	6.8%	3.4%	3.4%	0.0%	52.5%	100.0%
Markazi Camp	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	100.0%	100.0%
Ali Sabieh	29.3%	25.3%	20.2%	3.0%	0.0%	0.0%	22.2%	100.0%
Camp Holl Holl	30.0%	0.0%	0.0%	0.0%	40.0%	10.0%	20.0%	100.0%
Camp Ali Addeh	26.5%	44.1%	11.8%	5.9%	2.9%	5.9%	2.9%	100.0%
Ali Addeh Host	0.0%	16.7%	0.0%	16.7%	0.0%	50.0%	16.7%	100.0%
Holl Holl Host	0.0%	0.0%	0.0%	0.0%	0.0%	50.0%	50.0%	100.0%
Total	25.4%	22.5%	13.1%	3.8%	3.3%	3.8%	28.2%	100.0%

[4.3. Market Supply and Demand Conditions](#)

[4.3.1 Trader to Refugee Ratio](#)

At the time of writing the report Djibouti was hosting about 15,000 refugees in the three refugee camps of Ali Addeh, Hol-Hol and Markazi. As Table 3 shows, Ali Addeh had about 75 percent of the refugees; Hol-Hol had 15 percent and Markazi had the remaining 10 percent. Markazi was the latest of the camps to be established. It hosts the refugees from Yemen following the escalation of the conflict in that country in 2015. Ali Sabieh and Hol-Hol were established earlier and host predominantly Somali refugees together with some Ethiopians and Eritreans.

Table 3: Refugee Access to Markets

Camp	Population	Markets	No of Traders	Total Traders	Refugee per Trader
Ali Addeh	11,130	Ali Addeh Camp	34	40	278
		Ali Addeh town	6		
Holl Holl	2,254	Holl Holl Camp	4	14	161
		Holl Holl town	10		
Markazi	1,400	Markazi camp	1	60	23
		Obock town	59		
Total	14,784		114	114	129

The markets surveyed were chosen on the basis of their close proximity to the camps and ease of access to the refugees for their food and non-food requirements. The number of traders surveyed per camp varied, with 60 for Markazi, 40 for Ali Addeh and 14 for Hol-Hol camp. The average ratio of refugees to trader (i.e. number of refugees per trader) was 129 while the corresponding ratios for the camps were 278 for Ali Addeh, 161 for Hol-Hol and 23 for Markazi camp. The implication in terms of service is that Markazi camp could have better service followed by Hol-Hol and Ali Addeh. But Ali Addeh had the largest number of traders (34) within camp premises followed by Hol-Hol with only 4 and Markazi with only one. In addition, refugees in Markazi Camp have to travel 3-4 kilometers to access the main market in Obock while the refugees in the other camps access markets within the camp or nearby communities.

The market in Ali Sabieh is situated some 25 km from Ali Addeh Camp and 30 km from Hol-Hol Camp. This distance is too far for the refugees to access the market. Moreover, local transport is not widely available and in any case would be too expensive for the refugees to afford. But Ali Sabieh market is a key hub market and major source of supply for the markets around the two camps. This is in addition to the markets in Djibouti City that remain the principal sources of supply for all the markets surveyed.

[4.3.2 Number of Customers Served by Traders](#)

Majority of traders across all markets said their customers increase in the current period compared to the previous year. Traders in Hol-Hol markets reported the highest increase with 57 percent of traders reporting, followed by Ali Sabieh (46 percent), Obock/Markazi (40 percent) and Ali Addeh with 33 percent. But the number of customers served across the markets in the previous week was low. In Obock, 45 percent of the traders served less than 25 customers. In

Hol-Hol markets, 100 percent of the traders served between 10 and 50 customers that week, compared with 78 percent and 58 percent in Ali Addeh and Ali Sabieh, respectively. Food stocks were also low in Obock where one in four traders did not have enough stock to serve more than 10 customers.

Table 4: Number of customers compared with one year ago (in percent)

Customers by Market	Number in Current vs. Last Year				Number in Previous Week					
	High	Low	Same	No resp	<10	10<25	25<50	50<100	>100	No resp
Obock/Markazi	40	35	12	13	23	22	7	7	3	33
Ali Sabieh	46	12	24	18	14	35	23	9	5	13
Holl Holl Mkts	57	0	14	29	0	57	43	0	0	0
Ali Addeh Mkts	33	20	33	15	10	53	25	3	0	10

Table 5: Proportion of refugee customers

Refugees customs by market	Percent of Refugee Customers				
	1-10%	11-25%	26-50%	>50%	No resp
Obock/Markazi	32	18	5	2	43
Ali Sabieh town	1	1	0	0	98
Holl Holl Camp/ town	7	14	21	29	58
Ali Addeh Camp/ town	29	30	33	20	0

Nearly all traders (98 percent) in Ali Sabieh market did not have refugee customers compared with Ali Addeh markets where all the traders served refugee customers. This is explained by the fact that the traders in Ali Addeh markets are mostly resident in the camp. These markets were also primarily established to serve the refugees. More than half of the traders in Obock and Markazi had refugee customers, but some 32 percent of the traders only had only 10 percent or less refugee customers. In Hol-Hol markets, more than 50 percent of the traders had about one third refugee customers. It is most likely that the high percentage of refugee customers in Ali Addeh and Hol-Hol markets reflects the impact of the cash-based transfer introduced in these camps. In addition to this, most of these markets are physically situated within the refugee camps or in nearby communities. The situation in Obock can be explained by its 3-4 kilometer distance from Markazi camp and a 100% in-kind food assistance is provided to refugees in Markazi. The refugees therefore had limited cash incomes which are mainly from the sale of food aid and no food items. The refugees in Markazi are receiving a relief food aid from several relief partners

who used to distribute for every households living in the camp, for some partners without taking in consideration the households size and which generate an extra food availability in the household food reserve.. There are currently no restrictions in the movement of the refugees.

Table 6: Weekly sales volumes compared last year same period

Market	Increased > 50%	Increased 10-49%	Increased 0-9%	No change	Decreased by > 50%	Decreased 10-49%	Decreased 0-9%	No answer
Obock	6.7%	20.0%	11.7%	20.0%	8.3%	16.7%	5.0%	11.7%
Ali Sabieh	5.1%	14.1%	10.1%	26.3%	4.0%	1.0%	1.0%	38.4%
Holl Holl	14.3%	0.0%	0.0%	71.4%	7.1%	0.0%	0.0%	7.1%
Ali Addeh	0.0%	15.0%	10.0%	42.5%	7.5%	0.0%	7.5%	17.5%

4.3.4 Changes in Sales Volumes

In Obock markets, majority of traders (about 39 percent) reported increase in sales volumes since the arrival of the refugees in April 2015, 30 percent reported a decrease, while 20 percent reported no change. The reported increase mirrors to some extent the increase in number of customers that the traders also reported earlier. On the other hand, majority of the traders in Ali Addeh markets (43 percent) and in Hol-Hol markets (71 percent) reported no increase in sales volumes. In Ali Sabieh market, 29 percent of traders reported increase in sales volumes, 26 percent had no change, and 6 percent reported a decrease while 38 percent had no response. However, in both markets, the traders who reported increase in sales volumes were slightly more than those who reported a decrease.

The main reason traders gave for the increase in sales volumes across all the markets was the increase in the number of customers. This was case in Hol-Hol and Ali Addeh markets where respectively 100 percent and 90 percent of the traders reported this increase in customers. This in part appears to reflect the introduction of cash as part of food assistance in these camps from October 2014, thus increasing effective demand on these markets. Some 78 percent of the traders in Obock and nearly 90 percent in Ali Sabieh also cited more traders. The underlying causes are not obvious, but it would be expected that the increased demand in the refugee camps would have contributed to higher trader purchases from Ali Sabieh, which also serves as key source of commodities for the camp markets. Meanwhile the arrival of refugees in Obock region would have contributed to the increase in market demand, albeit from own resources and sale of relief food aid according to the FGD done with the refugees community leader.

About 50 percent of traders in Obock believe that the sales increase could return to normal levels within the next 6 months. In Ali Addeh, all traders interviewed believe that the volumes would return to normal between 6-12 months; in Hol-Hol all traders thought the change was seasonal

and sales volumes would decline within two months. Their predictions were in part linked to increased import from Ethiopia from the *meher* harvest reaching these markets in October, and declining thereafter.

Table 7: Factors for increase in sales volumes

Increase factors by location	Obock camp / town	Ali Sabieh city	Holl Holl camp / town	Ali Addeh camp/town
More customers / purchase power	78.3%	89.7%	100.0%	90.0%
Increase in market supply	8.7%	6.9%	0.0%	0.0%
Increase demand from orders communes	4.3%	0.0%	0.0%	0.0%
More capital and credit to traders	4.3%	0.0%	0.0%	0.0%
Other has specify	4.3%	11.0%	0.0%	10.0%

The main food commodities traded were rice, sugar, wheat flour and spaghetti. Wheat flour was found to be most traded among traders in Obock; fish was also reported traded mostly in Obock. The latter reflects its location as seaside town and the fact that it was also the fishing season. Vegetables were sold most in Hol-Hol and to a lesser extent in Ali Addeh reflecting their closer proximity to the main markets in Djibouti, which is the main distribution Centre. Sales of pulses and fruits were generally very low, which has implications for nutrition adequacy.

However, the profile of traders appear to differ between the markets. In Obock, over 65 percent of traders reported selling 5 or more commodities compared with 86 in Hol-Hol and 75 percent in Ali Addeh who reported selling 4 commodities or less.

Table 8: Number of Traders by Commodities and Markets

Commodities	Obock/Markazi	Ali Sabieh	Hol-Hol	Ali Addeh
Maize	0	1	0	0
Sorghum	2	0	0	0
Wheat flour	53	72	7	0
Rice	63	74	64	58
Sugar	68	81	64	78
Vegetable Oil	20	33	21	5
Spaghetti	65	22	50	40
Macaroni	43	2	0	18
Milk (2.5 kg)	27	13	14	20
Feves Qualite	2	9	0	0
Beans	3	9	0	0
Meat	5	3	7	13
Fish	15	0	0	0
Vegetables	7	4	21	10
Fruits	0	3	0	0

4.3.5. Main food sources

Djibouti city is the main source of food for all the markets; with 77 percent of traders in Obock and 94 percent of traders in Hol-Hol reporting this.

However, the role of local wholesalers within these and nearby markets such as Ali Sabieh is also significant. This was particularly found to be the case in Ali Addeh local wholesalers were reported by 58 percent of the traders and in Ali Sabieh where it was reported by 51 percent of traders.

Table 9: Main sources of commodities traded

	Obock camp/town	Ali Sabieh city	Holl Holl camp / town	Ali Addeh camp/town
Wholesalers & Markets in Djibouti	81%	26%	94%	8%
Local wholesalers	18%	74%	0%	64%
Fishing / gathering	2%	0%	0%	0%

4.3.6 Stocks available

The largest quantities and diversity of food stocks were in Ali Sabieh followed by Obock, Ali Addeh, and Hol-Hol markets. In Obock, red sorghum and pasta are the main commodities stocked by traders, followed by wheat flour, rice and sugar. By contrast, in Hol-Hol, stocks that are available include rice, sugar, pasta and vegetables. Ali Addeh has slightly more diversified range of stocks than Hol-Hol. The traders held stocks of sorghum, wheat flour, pulses and milk, with lower quantities than in Obock and Ali Sabieh. The stocks that are held in these markets in greater part reflect the number of traders and the population of potential customers in these locations. As would be expected, the larger populations in Ali Sabieh and Obock compared with Ali Addeh and Hol-Hol are indicative. Other important factors include effective market demand, which to a greater extent accounts for the expansion of trade and trader capacities in Ali Addeh and to some extent in Hol-Hol linked to the introduction of cash assistance to refugees living in these camps.

Table 10: Stocks availability (Kg) by stratum and by commodities

Commodities	Stocks available (Kg)			
	Obock camp/town	Ali Sabieh city	Hol-Hol camp / town	Ali Addeh camp/town
Maize (quality +)	5	85	0	38
Maize (quality)	142	59	0	94
Sorghum (white)	0	150	0	0
Sorghum (red)	1275	193	0	75
Wheat flour	467	898	1	200
Rice	354	1218	255	304
Sugar	304	961	222	271
vegetable oil	32	201	14	13
Spaghetti	1282	307	89	92
Macaroni	1397	303	50	68
Milk	28	277	8	44
Bean (high quality)	15	152	0	50
Bean (low quality)	0	144	0	42
Beans	22	163	0	50
Meat	2	38	61	4
Fish	17	5	0	0
Vegetables	0	502	260	330
Fruit	0	75	0	0
Other	0	68	0	0

Table 11: Actual Stock availability vs last year stock by markets

Stock changes	Obock camp/to wn	Ali Sabieh city	Hol-Hol camp / town	Ali Addeh camp/to wn	TOTAL
High	29.5%	39.2%	57.1%	40.6%	37%
Low	13.8%	16.8%	0.0%	10.4%	14%
Unchanged	22.3%	23.4%	17.1%	22.9%	23%
No response	34.4%	20.6%	25.7%	26.0%	26%

Only 3.3% of traders in Obock however affirm being able to meet a 100% increase in demand, while 21% declare not being able and the vast majority not answering the question.

90% of traders in Ali Addeh declare being able to meet the demand increase within the month, while a third of those in Hol-Hol is unable to scale up their stocks to meet increasing demand.

Table 12: Capacity of traders to meet 100% demand increase on food commodities

	Obock camp/town	Ali Sabieh city	Hol-Hol camp / town	Ali Addeh camp/town
Non	21.7%	17.2%	28.6%	7.5%
Yes in a week	3.3%	44.4%	14.3%	75.0%
Yes in two weeks	0.0%	9.1%	0.0%	12.5%
Yes in a month	0.0%	7.1%	21.4%	2.5%
Yes but only after more than a month	0.0%	12.1%	28.6%	0.0%
No answer	75.0%	10.1%	7.1%	2.5%

4.4. Analysis of Price Conditions

Table 13 presents the findings of trader comparison of prices at the time of the survey with prices at the same time one year ago. About 46 percent of the traders said the current purchase prices for their main commodities were lower compared with one year ago; 26 percent believed prices were unchanged; 14 percent said prices were higher; and another 14 percent had no opinion. Analysis by markets revealed a similar picture with majority traders in most of the markets indicating that prices were lower compared to one year ago. This was reported by 61 percent of the traders in Ali Sabieh, 56 percent in Ali Addeh Camp, 83 percent and 46 percent in Ali Addeh host community and Hol-Hol host community, respectively. However, in Obock city, majority of 48 percent believed prices were stable. In Hol-Hol Camp, equal percentages of traders (30 percent each) believed prices were higher or lower. Analysis by trader category also revealed that majority of retail traders who constitute the largest category believed prices were lower. But analysis by commodity groups revealed some variations. Prices of general food commodities were lower (53 percent) compared with fruits where 50 percent of the traders said it was higher; and meat and fish where 53 percent and 63 percent said prices were stable.

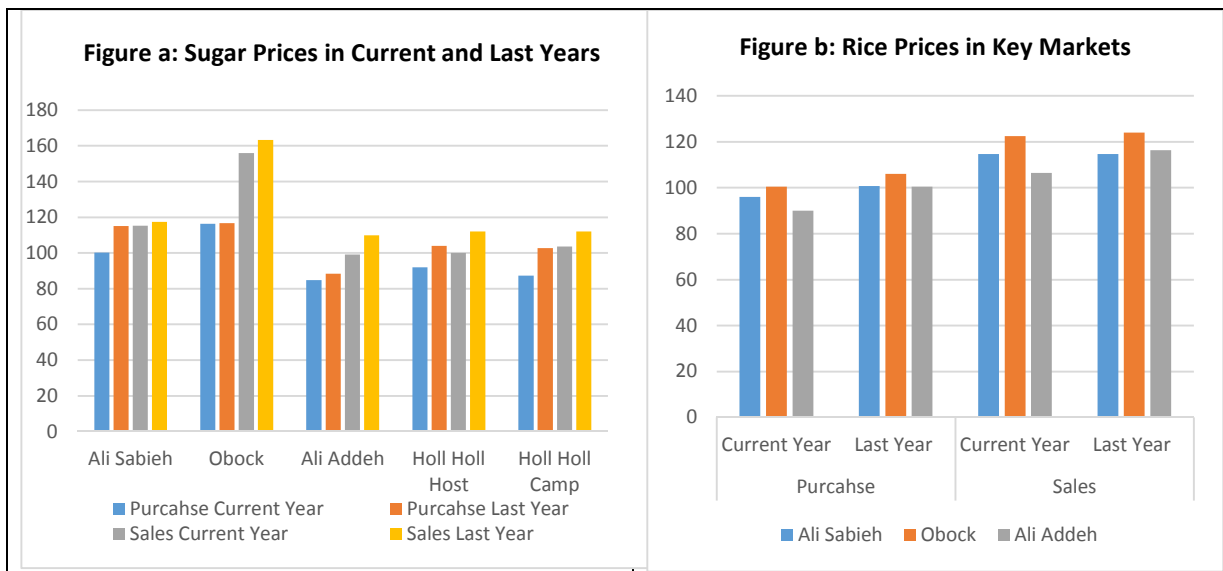
Table 13: Prices for Main Commodities in Current vs One Year Ago

Prices comparison by markets	Frequency	Percentage	Obock city	Markazi Camp	Ali Sabieh	Camp Hol-Hol	Camp Ali Addeh	Ali Addeh host	Hol-Hol host
Higher	30	14.1	20.3%	0.0%	10.1%	30.0%	8.8%	16.7%	25.0%
Lower	98	46.0	13.6%	100.0%	60.6%	30.0%	55.9%	83.3%	50.0%
Stable	55	25.8	47.5%	0.0%	15.2%	10.0%	29.4%	0.0%	25.0%
No response	30	14.1	18.6%	0.0%	14.1%	30.0%	5.9%	0.0%	0.0%
Total	213	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

The assessment also collected prices for all commodities and this is presented in the appendix 1. This is also presented in Figure 8a & 8b below for prices for the main commodities (sugar and rice). Both figures show that both purchase and the sales prices in the current were lower than in the previous year, thus confirming the qualitative findings reported above. In figure 8a, the price for sugar was found to be highest in Obock compared with their levels in other markets. In fact prices for sugar appear to be lowest in Ali Addeh and Holl Holl camp markets, which appears to reflect the fact that sugar is one of the food commodities distributed to the refugees. It is likely that this has depressed the overall demand and consequently the prices on these markets.

With regards to the prices of rice presented in Figure 8b, Obock market consistently has the highest levels compared with Ali Addeh and Ali Sabieh. This applies to both the purchase and sales prices, as well as to the current and the previous year. It should be noted that Obock is one of the poorest regions in the country. The high prices would seem to reflect this reality with possibly low supply constrained by relatively higher costs of transportation reflecting distance. The price differences between Ali Addeh and Ali Sabieh is not significant. A further comparison of sales prices for wheat in current and previous years in Ali Sabieh and Obock markets similarly reveals that prices were consistently higher in Obock. This pattern is broadly similar for most of the commodities for which we have prices (see Appendix 1).

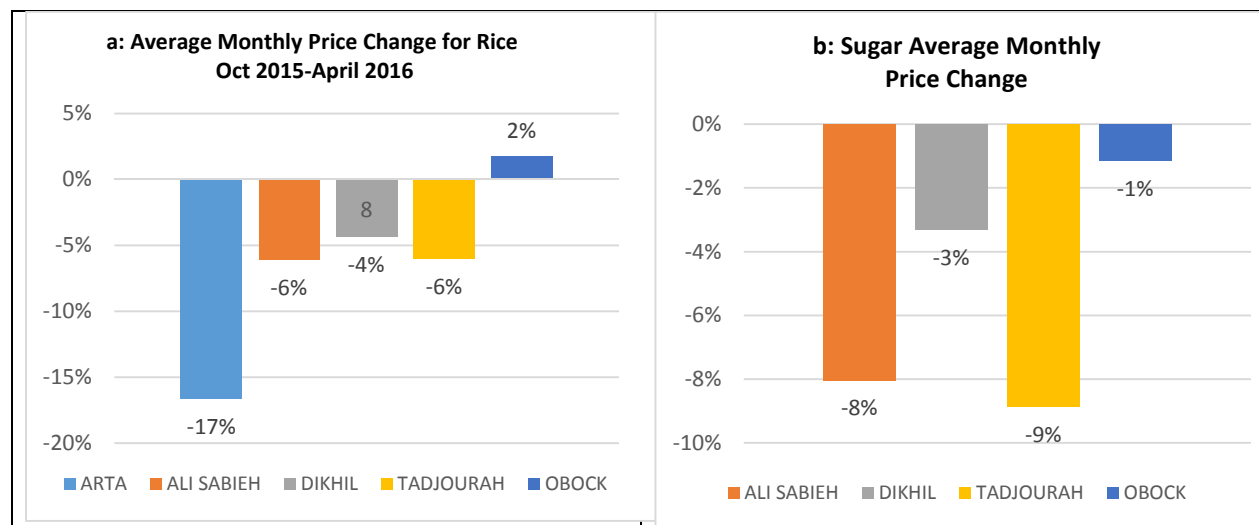
Figure 8: Regional Prices for Sugar and Rice



The above findings are consistent with analyses using secondary price data collected by WFP in the major regional markets. Analysis of monthly price changes for key commodities over the past six months have revealed that overall, prices declined. The average monthly prices for rice was found to have declined on all regional markets between October 2015 and April 2016 except in Obock, where it rose by 2 percent. The pattern was broadly similar for prices of sugar, where the rate of decline was lowest in Obock at 1 percent. It is not clear what the main causes of these

variations are, but it is likely that it reflects the state of the social and economic conditions along with factors (e.g. transportation costs) that affect supply in the different regions.

Figure 9: Average Monthly Price Change for Rice and Sugar by Region



The assessment established that prices are determined by the individual traders in most markets with an average of 53 percent of traders reporting this. However this varied across the markets. About with 46 percent of traders in Obock city, 50 percent in Hol-Hol town, 63 percent in Ali Sabieh and 100 percent in Hol-Hol camp stated that they determined their own prices. But in Ali Addeh Camp, 38 percent of traders set their own price compared with 62 percent who said prices were collectively set by the traders. Further analysis of price setting behavior by commodity category revealed a similar pattern with 56 percent of prices being set by each trader. Retail traders and semi-wholesalers respectively indicated that 59 percent and 44 percent of them individually set their own prices.

With regards to the prospects for price evolution in the next three months from the time of the assessment, majority of traders (34 percent) believed prices of their main food products would remain unchanged; 15 percent believed prices would increase; while about 11 percent believed prices would decrease. The view that prices would remain stable was fairly uniformly shared across most markets, with the exception of the Markazi Camp market which had only one trader, who believed prices would rise by up to 10 percent. Analysis by trader category revealed that majority of retailers believed prices would remain unchanged; semi-wholesalers believe prices would remain stable or decrease over the next three months. There were no compelling reason advanced by the traders for the anticipated changes in prices.

Traders were asked about their expectations for potential changes in prices due to 100% increase in demand of their main commodity. The findings are presented in Table 14 with majority 52 percent of traders saying this would have no impact. However, 35 percent said prices would increase - with 11 percent saying prices would more than double and one quarter suggesting

prices would increase by more than 25 percent. Further analysis by markets revealed that there were higher number of traders from Ali Sabieh (21 percent) and Ali Addeh town (33 percent) who indicated that prices would increase by more than 50 percent. Further, of 74 traders who provided valid responses, 55 percent believed that any change in prices would be temporary compare with 41 percent who believed a change would be permanent.

Table 14: Trader Expectation of price changes due to 100% increase in demand

Prices changes by markets	Obock city	Markazi camp	Ali Sabieh	Camp Holl Holl	Camp Ali Addeh	Ali Addeh host	Holl Holl host	Total
Increase	33.9%	100.0%	33.3%	60.0%	32.4%	33.3%	25.0%	34.7%
No change	28.8%	0.0%	62.6%	40.0%	58.8%	66.7%	75.0%	51.6%
Lower	37.3%	0.0%	4.0%	0.0%	8.8%	0.0%	0.0%	13.6%
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0 %	100.0 %

Most of the traders who believed price changes would be temporary were from Obock city, Camp Hol-Hol and Hol-Hol town. Meanwhile majority in Ali Sabieh, Ali Addeh Camp and Ali Addeh host community believed the changes could be sustained. Analysis by trader category also indicated that retailers who were the largest category and about half of mixed retail-wholesalers believed prices changes would be temporary. Similarly, majority of the traders across all of the food categories believed that any changes in prices would be temporary.

4.5: Constraints and Capacity to Increase Supply

Although most traders (93 percent) said they had no problems with their business when asked directly, there are in fact a number of underlying challenges that constrain their businesses. These challenges ranged from limited number of clients to lack of capital and debts.

4.5.1 Relationships with Refugees

The overall relationships between traders and refugees were reported to be good. Asked if there were any tensions between the refugees and traders, the overwhelmingly response (98 percent) was no. Most traders (94 percent) were not aware of any communication or language problems between the refugees and traders. A similar percentage of traders were not aware of any security problems on the markets, except for minor incidents (fights) reported predominantly in Obock city.

Most traders welcomed any future changes that would double the amount monthly cash that might be given to the refugees. Asked if customers received twice the amount of money to spend on main products, some 141 traders out of 153 valid respondents (89 percent) said they would be able to increase their supply of stocks to meet the increased demand. About half of the traders said they would do so within one week. The largest number of these traders were from Ali Sabieh and Ali Addeh Camp, representing 44 percent and 74 percent of the total number of traders in these markets, respectively. Some 62 percent of the traders would in fact prefer that the refugees received this double cash ration all at once rather than in two separate instalments in the month.

Table 15: Constraints identified by traders

		First Constraints		Second Constraints		Third Constrains	
1	Low capital	102	37%	10	4%	101	5%
2	Lack of credit / Expensive credit	25	9%	65	24%	123	6%
3	Low or varied quality of food	6	2%	18	7%	189	9%
4	Low quantity / Trade restrictions	10	4%	13	5%	190	9%
5	Lack of transport capacity	36	13%	27	10%	150	7%
6	Insecurity	9	3%	6	2%	198	10%
7	Lack of storage	25	9%	32	12%	156	8%
8	Low profitability	15	5%	17	6%	181	9%
9	Low demand	12	4%	34	13%	167	8%
10	High competition	15	5%	20	8%	178	9%
11	Government restriction / taxes	10	4%	12	5%	191	9%
12	Food assistance (Multiples)	11	4%	12	5%	190	9%
13	High petrol prices	0	0%	0	0%	8	0%
14	Lack of Ices (Fishermen)	0	0%	0	0%	8	0%
		276	100%	266	100%	2030	100%

In the region markets, the mains constraints reported by the traders in majority as most important one is the low of capital, lack of transport capacity, lack of credit and lack of storage. Actual transportation and storage facilities are challenging for traders and by default they continue to offer their service.

The means of transport used are varied and ranged from trucks and pickups (including rented) reported by 100 traders (47 percent) to wheelbarrows (24 percent), chariot / charettes (14 percent), to ferry boats (9 percent) and public transport (5 percent). Trucks and pickups were

reported to be used across all the markets and most especially in Ali Sabieh, Obock and Ali Addeh Camp that have the largest number of traders. Wheelbarrows and chariot were also most widely used in these markets while ferry boats were the most dominant in Obock city.

Some 38 percent of traders reported that they had no storage facilities, just over half of these from Obock city. Of the remainder that reported availability of storage, the majority of them (86 percent) owned their storage (or 54 percent of total traders). Of the 12 traders who rented, the rental rates ranged from DJF 6,000 to DJF 23,000 per month, the higher rates being paid by traders in Ali Sabieh.

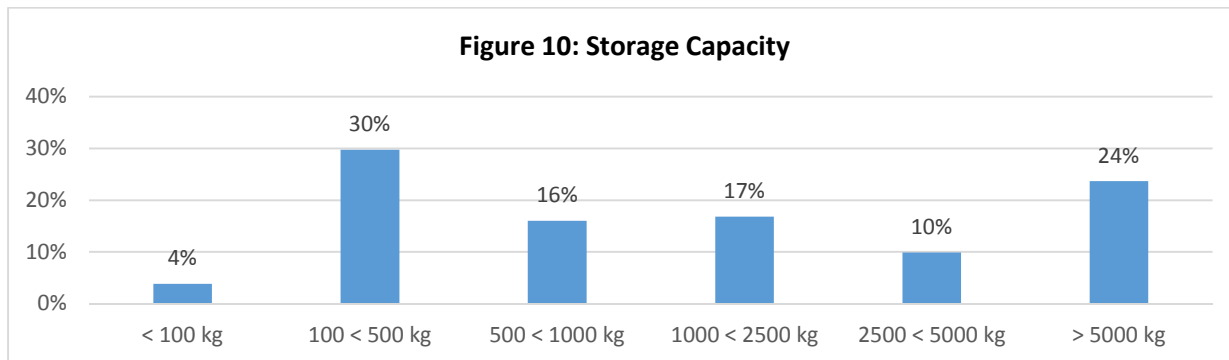


Figure 10 presents the summary of storage capacity reported by the 131 traders. This shows that largest proportion of traders (30 percent) had 100-500 kg capacity, while about one quarter (24 percent) had more than 5 MT storage capacity. Traders in the latter category were mainly from Ali Sabieh (24), followed by Obock (4) and Ali Addeh Camp (2) and Ali Addeh town (1).

Asked if they would be able to increase their storage capacity if the demand for their products increased, 86 percent (i.e. 113 out of 131) said they would. The majority of them (53 percent) saying they would only increase by up to 25 percent of their existing capacities. Some 24 percent of the traders indicated they would be able to increase storage by more than 50 percent while only 13 percent would be able to increase by more than 100 percent; majority in the latter group of 12 traders were from Ali Sabieh, 2 from Obock and 1 from Ali Addeh town.

4.5.2 Banking facilities and credit

A large majority of the traders (85 percent) have no bank accounts dedicated to their business. Of the remaining 15 percent, more than 84 percent (i.e. 27 out of 32) were from Ali Sabieh while 2 of these were from Obock and one (1) each from Markazi Camp, Hol-Hol Camp and Hol-Hol town.

Similarly, majority of the traders (196 out of 213 or 92 percent) reported not having any access to credit facilities. Of the remaining 8 percent (17 traders) who access credit, only five (5), all of them from Ali Sabieh obtained credit from bank; a larger number (10) received from CPEC/ADDS and the remainder (2) obtained from other sources, mainly other traders. None of the traders from Markazi Camp, Ali Addeh Camp and Hol-Hol town reported receiving any credit.

Table 16: Period of Loan Repayment

	Obock city	Ali Sabieh	Ali Addeh host	Total
2 - 4 Weeks	0	2	1	3
1 - 2 months	3	5	0	8
2 - 6 months	1	4	1	6
	4	11	2	177

The loan repayment period for the 17 traders varied, but remained invariably short term with the majority of them (11 out of 17 traders or 65 percent) paying within two months.

Table 17: Amounts of Loans Taken by Traders

Amount (DJF)	Frequency	Percent
30,000 < 100,000	10	59%
100,000 < 400,000	4	24%
500,000 <	3	18%

Majority of traders (59 percent) had loans up to DJF 100,000 with 18 percent taking DJF 500,000 or more. The information on payable interest rates was not clear, but these appear to range from 10,000 to 100,000 per loans taken and should depend on financial institution facilities.

Some 50 percent of the traders had bank facilities less than 2 kilometers away; 21 percent were 2-5 kilometers from the nearest bank; and the remaining 28 percent were more than 5 km from the nearest bank. However, none of these had any significance in terms of ownership of bank account and access to bank loans for trading.

However, one quarter of the traders (54 out of 213) indicated that they had access to commodity credit from their suppliers. The average period of repaying these loans ranged from between 1-2 weeks (24 percent) to 2-4 weeks (35 percent) and 2-6 months (39 percent). Only one trader received a loan payable in over 6 month period. The analysis also shows that food credit hardly increased from the previous year – with only 17 percent (all in Obock City and Ali Addeh Camp) indicating an increase.

On the other hand, majority of traders (72 percent or 154 out of 213) made they credit sales to their customers; this was the case for more than half of the traders in all of the markets. Most of these (54 percent) were repayable within one month and 16 percent repaid within 1-2 months. Close to half of those traders (47 percent) believed credit sales increased compared with the previous year – majority of them by up to 25 percent.

4.5.3 Opportunities of trading

Asked if they can freely trade inside the camps, majority of the traders (53 percent) answered no. Their main reasons were that it was illegal, not secure, distance, and the fact that refugees do receive food assistance and the resulting low benefit.

Refugees and asylum seekers were most predominant in Ali Addeh Camp and Hol-Hol Camp, with a small number trading in Ali Addeh town. While nationals were predominantly found in Ali Sabieh and Obock towns, only half of the traders interviewed in Hol-Hol Camp and one-fifth of those in Ali Addeh camp were nationals. All of the refugees and asylum seeker were in the retail sector; and in the general food sector followed by meat trade and vegetables.

In the concluding comments, traders highlighted limited finance and storage capacities as their main constraints.

5. Conclusions and Recommendations

5.1. Main Conclusions

The main conclusions drawn below are based on key decision criteria for determining feasibility for cash transfer. These criteria include consistent availability of food commodities that can ensure access to the markets for refugees; low and stable prices that will assure access to consistent amounts of food commodities even when effective demand has increased as a result of cash transfer; and the capacity of the traders to increase supply in response to increase in demand that is critical to the stability of availability and prices. Others include considerations for protection of beneficiaries, the existence of partners with sufficient capacity to implement cash based transfer and crucially the availability or likelihood of donor funding for the programme. All of these are briefly discussed and are the basis of the final recommendations that follow in the next section of the report.

- i) Consistent availability and capacity to expand supply: The analysis points to generally adequate supply of food commodities across all of the markets the refugees had access to during the time of the assessment. This is underpinned by a good supply network between the traders in these markets and the main and subsidiary hub markets, notably in Djibouti and Ali Sabieh. It is the technical judgement that any increase in demand due to an increase (or introduction) of cash transfers will lead to increase in supply to these markets. Although trader capacity to finance this increase remains low due to their low capital base and limited access to financial credit through formal institutions, these traders nevertheless do obtain commodity credit from their main suppliers, which will support the expansion of their trade. However, we anticipate that this capacity to expand supply will likely be higher in Ali Addeh and Hol-Hol where there was already a significant increase in the number of traders since the introduction of CBT. In Obock, there is a reasonable likelihood that supply could also increase, that will be underpinned by an already large number of traders (albeit with low existing capacities) and a good and relatively efficient supply route using the boat-ferry , albeit seasonally.
- ii) Price stability to support transfers: There is expectation that the stability of prices will vary across the markets, in part reflecting regional differences. It is anticipated that prices will remain relatively stable in the markets that supply Ali Addeh and Hol-Hol camps. These prices were found by the analysis of the trader survey questionnaire and by analysis of the regional price data to be stable or in some cases even declining. We anticipate that the expected increase in supply (noted above) will contribute to maintain this trend of stability of price levels, building on the experience of cash based transfers introduced about two years ago. However, the analysis does not provide sufficient evidence that price levels on markets in Obock and Markazi camp will decline below their relatively high levels. At best, we would

expect prices to remain stable around their current seasonal levels. It was established that prices in Obock region were not only higher compared to other regions, but in fact were on the increase during the past six months. All of these have important implications for CBT transfer values and their stability, particularly taking into consideration the existence of strong seasonality in price patterns where prices tend to be high during May to September when it is hottest in the country, somehow is linked to the transport cost by the road and for its long distance.

- iii) Safety and protection conditions: It has been established that there is generally a harmonious co-existence between the traders and the refugees across all of the surveyed markets. Focus group discussions that were conducted across all the camps with several groups/categories (including men, women, children, refugee leaders, people with disabilities and nationalities) provided consistent information about the absence of any significant protection issues.
- iv) CBT experience and existence of partners: The evidence from several reviews of CBT experience in Ali Addeh and Hol-Hol refugee camps show success of this initiative and very strong support for it from both refugees and traders. There is a demonstrated strong partnership among key institutions for the CBT as well as the capacity to implement it. There is therefore the confidence that an expansion of CBT in these camps will be beneficial and be guided by the good track record over the past two years. This experience could also benefit the introduction of CBT in Obock, although the success there will ultimately depend on the existence of NGOs partners operating in the region or their willingness and ability to do so.
- v) Availability of funding for CBT: Funding availability is ultimately the key determinant of CBT beyond the establishment of the technical feasibility and capacity to implement. It is thus of critical importance that the final decision to implement CBT be guided by a considered long view of assured resource commitments from donors.

5.2. Main Recommendation

The key findings from the analyses lead to following recommendations.

- 1) Cash based transfers should be continued in Ali Addeh and Hol-Hol refugee camps. The cash transfer value should also be increased concurrently with proportionate reduction of the remaining in-kind transfers. However, it is recommended that the increase in cash value should be gradual; to avoid potential disruptive effects on market prices arising from sudden increase in demand, that could erode entitlements in the short-term. A gradual increase will enable to the market to adjust in an orderly way, as market capacity gradually increases. It is therefore suggested that the increase starts with 50 percent of the current transfer value, and be raised to 75 or 100 percent, while reducing or not in-kind in the same proportion and this should be informed by the findings of market monitoring.
- 2) The current market conditions in Obock and Markazi camp do not support the introducing CBT in Markazi camp. The principal reasons for this is that prices on these markets have remained consistently high and increased significantly over past six months. The assessment findings give little confidence that the situation will change soon. It should however be noted that there is a good supply connection with Djibouti and there are many traders (albeit with low capacities). It is therefore possible that the situation could change to support CBT in the future. It is further recommended that the decision be reviewed (after 6 months) and this should be informed by the findings of the ongoing market monitoring.
- 3) Seasonality of commodity availability and commodity prices that is evident across most markets should be taken into consideration in deciding or setting transfer values in Ali Addeh and Hol-Hol. The underlying concern is that with a fixed value, the seasonal price variations could lead to a situation where beneficiaries would purchase less quantities of commodities during the period of high prices, and vice-versa. This challenge could be addressed through reducing the amount of cash transfer during peak lean season (3-5 months) and replacing this reduction with in-kind transfer, or by increasing the transfer value during this peak season to ensure a regular purchasing power for refugees.
- 4) To support the implementation of the foregoing, it is further strongly recommended that WFP and partners should continue to monitor markets. This should focus on price and supply conditions on the main markets. Along with the monitoring of the implementation of CBT, this will help to support future decisions, including on adjusting transfer values.
- 5) Additionally, it would be helpful to support market development initiative particularly in the refugee camps. This could include support to traders in areas that address their main constraints (e.g. capital and storage) that would boost market capacity and efficiency and in turn strengthen the success of CBT. It could also contribute to building livelihood of the refugees and in the long-run reduce dependence on food assistance.

References

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2. Market Price Dataset for the 5 districts – 2012/2016 – WFP market monitoring.
3. Food Security and Outcome Monitoring survey in the camps of Ali Addeh and HollHoll – October 2014 / 2015 in collaboration with ONARS, UNHCR and UNWFP.
4. Protection Assessment report of CBT programmes in the camps of Ali Addeh and HollHoll – May 2015 in collaboration with ONARS, UNHCR and UNWFP.
5. Feasibility Study report for CBT programme in the camps of Ali Addeh and HollHoll – September 2014 in collaboration with UNHCR, ONARS and UNWFP.
6. Food Security, Livelihoods and Market Assessment report – November 2013 in collaboration with ONARS, UNHCR and UNWFP.
7. Joint Assessment Mission – November 2013 in collaboration with UNHCR and UNWFP.

Appendices

1: Price Variations Purchasing vs Sale prices (Actual and Last Year prices)

Trading Activity	Localisation	Food Commodities	Actual Purchase Price	Last year Purchase Price	Actual Sale Price	Last year Sale Price	Unit Mesure	Sale Price compare to 6 months ago
Retailer	Ali Sabieh	Wheat Flour	140	90	120	140	kg	Low
Retailer	Ali Sabieh	Wheat Flour	216	120	120	140	kg	Low
Retailer	Ali Sabieh	Wheat Flour	184	0	104	0	kg	Low
Retailer	Ali Sabieh	Wheat Flour	168	96	92	104	kg	Low
Retailer	Ali Sabieh	Wheat Flour	200	110	104	114	kg	Low
Retailer	Ali Sabieh	Wheat Flour	176	104	120	140	kg	Low
Retailer	Ali Sabieh	Wheat Flour	168	100	120	140	kg	Low
Retailer	Ali Sabieh	Wheat Flour	176	92	120	140	kg	Low
Retailer	Ali Sabieh	Wheat Flour	180	100	102	112	kg	Stable
Retailer	Ali Sabieh	Wheat Flour	180	104	102	116	kg	Stable
Retailer	Ali Sabieh	Wheat Flour	208	116	116	128	kg	Stable
Retailer	Ali Sabieh	Wheat Flour	192	104	108	116	kg	Stable
Retailer	Ali Sabieh	Wheat Flour	192	104	108	116	kg	Stable
Retailer	Ali Sabieh	Wheat Flour	200	100	106	106	kg	Stable
Retailer	Ali Sabieh	Wheat Flour	200	100	106	106	kg	Stable
Retailer	Ali Sabieh	Wheat Flour	200	100	106	104	kg	Stable
Retailer	Ali Sabieh	Wheat Flour	200	100	106	106	kg	Stable
Retailer	Ali Sabieh	Wheat Flour	200	100	106	106	kg	Stable
Retailer	Ali Sabieh	Wheat Flour	180	106	120	140	kg	Stable
Retailer	Obock ville	Wheat Flour	200	80	120	100	kg	High
Retailer	Obock ville	Wheat Flour	200	0	130	0	kg	Low

Retailer	Obock ville	Wheat Flour	180	80	120	120	kg	Low
Retailer	Obock ville	Wheat Flour	240	100	130	120	kg	Low
Retailer	Obock ville	Wheat Flour	280	0	160	0	kg	Pas de reponse
Retailer	Obock ville	Wheat Flour	260	130	140	140	kg	Stable
Retailer	Obock ville	Wheat Flour	200	100	120	120	kg	Stable
Retailer	Obock ville	Wheat Flour	200	100	120	120	kg	Stable
Retailer	Obock ville	Wheat Flour	80	40	75	75	kg	Stable
Retailer	Obock ville	Wheat Flour	200	100	130	130	kg	Stable
Retailer	Obock ville	Wheat Flour	220	0	120	0	kg	Stable
Retailer	Obock ville	Wheat Flour	180	90	110	110	kg	Stable
Retailer	Obock ville	Wheat Flour	180	0	100	0	kg	Stable
Retailer	Obock ville	Wheat Flour	280	0	160	0	kg	Stable
Retailer	Obock ville	Wheat Flour	200	100	130	130	kg	Stable
Retailer	Obock ville	Wheat Flour	180	90	110	110	kg	Stable
Retailer	Obock ville	Wheat Flour	200	0	120	0	kg	Stable
Retailer	Obock ville	Wheat Flour	88	0	75	0	kg	Stable
Retailer	Obock ville	Wheat Flour	200	0	130	0	kg	Stable
Retailer	Markazi	Wheat Flour	200	104	104	108	kg	Stable
Retailer	Obock ville	Wheat Flour	200	96	120	116	kg	High
Retailer	Obock ville	Wheat Flour	220	0	120	0	kg	Low
Retailer	Obock ville	Wheat Flour	220	0	120	0	kg	Low
Retailer	Ali Sabieh	Vegetable Oil	132	132	132	132	L	Stable
Retailer	Ali Sabieh	Vegetable Oil	250	250	250	250	L	Stable
Retailer	Obock ville	Vegetable Oil	200	200	200	200	L	Stable
Retailer	Ali Sabieh	Powder Milk (2.5)	1280	1440	1540	1700	KG	High
Retailer	Ali Sabieh	Powder Milk (2.5)	1480	1600	1780	1900	KG	Low
Retailer	Ali Sabieh	Powder Milk (2.5)	1320	1600	1600	1900	KG	Low

Retailer	Ali Sabieh	Powder Milk (2.5)	1120	1280	1200	1680	KG	Low
Retailer	Ali Sabieh	Powder Milk (2.5)	1360	1280	1600	1600	KG	Stable
Retailer	HH hote	Powder Milk (2.5)	1040	1080	1200	1280	KG	Stable
Retailer	Obock ville	Macaroni	180	180	180	180	KG	Stable
Retailer	AA refugeie	Pasta	170	170	170	170	KG	Stable
Retailer	Obock ville	Pasta	180	180	180	180	KG	Low
Retailer	Obock ville	Pasta	170	170	170	170	KG	Pas de reponse
Retailer	Obock ville	Fish	300	300	600	600	KG	Stable
Retailer	Obock ville	Fish	300	300	500	500	KG	Stable
Retailer	Obock ville	Fish	300	300	400	400	KG	Stable
Retailer	Obock ville	Fish	300	0	450	0	KG	Low
Retailer	Obock ville	Fish	300	300	600	500	KG	Stable
Retailer	Obock ville	Fish	300	300	500	500	KG	Stable
Retailer	Obock ville	Fish	300	100	500	300	KG	Stable
Retailer	AA refugeie	Rice	100	100	110	110	KG	High
Retailer	AA refugeie	Rice	88	110	100	120	KG	Low
Retailer	AA refugeie	Rice	88	100	120	120	KG	Low
Retailer	AA refugeie	Rice	84	96	120	120	KG	Low
Retailer	AA refugeie	Rice	86	160	100	180	KG	Low
Retailer	AA refugeie	Rice	88	92	120	120	KG	Low
Retailer	AA refugeie	Rice	100	104	120	130	KG	Low
Retailer	AA refugeie	Rice	82	90	90	98	KG	Low
Retailer	AA refugeie	Rice	88	96	100	104	KG	Low
Retailer	AA refugeie	Rice	92	92	92	92	KG	Stable
Retailer	AA refugeie	Rice	88	100	120	140	KG	Stable
Retailer	AA refugeie	Rice	96	0	120	0	KG	Stable
Retailer	AA refugeie	Rice	88	96	100	120	KG	Stable

Retailer	AA refugeie	Rice	96	96	104	104	KG	Stable
Retailer	AA refugeie	Rice	88	88	88	88	KG	Stable
Retailer	AA refugeie	Rice	88	88	100	100	KG	Stable
Retailer	Ali Sabieh	Rice	132	132	132	132	KG	Low
Retailer	Ali Sabieh	Rice	92	0	120	0	KG	Low
Retailer	Ali Sabieh	Rice	108	140	130	180	KG	Low
Retailer	Ali Sabieh	Rice	86	96	120	130	KG	Low
Retailer	Ali Sabieh	Rice	88	80	110	100	KG	Low
Retailer	Ali Sabieh	Rice	86	96	98	108	KG	Stable
Retailer	Ali Sabieh	Rice	100	108	106	112	KG	Stable
Retailer	Ali Sabieh	Rice	100	100	130	150	KG	Stable
Retailer	Ali Sabieh	Rice	70	66	100	100	KG	Stable
Retailer	Ali Sabieh	Rice	100	100	120	120	KG	Stable
Retailer	Ali Sabieh	Rice	100	100	110	110	KG	Stable
Retailer	HH refugeie	Rice	84	100	114	134	KG	Stable
Retailer	Obock ville	Rice	100	0	140	0	KG	Low
Retailer	Obock ville	Rice	100	120	120	130	KG	Low
Retailer	Obock ville	Rice	100	100	150	130	KG	Low
Retailer	Obock ville	Rice	120	120	140	140	KG	Stable
Retailer	Obock ville	Rice	2.6	2.6	2.8	2.8	KG	Stable
Retailer	Obock ville	Rice	112	112	112	112	KG	Stable
Retailer	Obock ville	Rice	96	96	106	106	KG	Stable
Retailer	Obock ville	Rice	100	100	100	100	KG	Stable
Wholesaler	Obock ville	Rice	92	100	120	140	KG	High
Semi Wholesaler	AA hote	Rice	82	82	86	86	KG	Stable
Semi Wholesaler	Ali Sabieh	Rice	90	90	100	100	KG	Stable
Semi Wholesaler	Ali Sabieh	Rice	30	30	35	35	KG	Stable

Semi Wholesaler	Obock ville	Rice	85	85	140	140	KG	Stable
Semi Wholesaler	Ali Sabieh	Sorghum (White)	800	900	824	928	KG	Low
Semi Wholesaler	Ali Sabieh	Sorghum (White)	50	0	70	0	KG	Pas de reponse
Semi Wholesaler	Obock ville	Sorghum (White)	140	140	240	240	KG	Stable
Retailer	AA refugeie	Sugar	84	84	88	88	KG	Low
Retailer	AA refugeie	Sugar	92	104	96	110	KG	Low
Retailer	AA refugeie	Sugar	92	104	96	110	KG	Low
Retailer	AA refugeie	Sugar	64	64	76	76	KG	Low
Retailer	AA refugeie	Sugar	64	76	70	80	KG	Low
Retailer	AA refugeie	Sugar	64	64	74	74	KG	Low
Retailer	AA refugeie	Sugar	86	100	120	140	KG	Low
Retailer	AA refugeie	Sugar	84	120	100	140	KG	Low
Retailer	AA refugeie	Sugar	88	100	100	120	KG	Low
Retailer	AA refugeie	Sugar	135	100	180	210	KG	Low
Retailer	AA refugeie	Sugar	100	80	120	100	KG	Stable
Retailer	AA refugeie	Sugar	64	64	70	70	KG	Stable
Retailer	Ali Sabieh	Sugar	106	100	118	112	KG	High
Retailer	Ali Sabieh	Sugar	100	120	120	140	KG	High
Retailer	Ali Sabieh	Sugar	88	104	92	112	KG	Low
Retailer	Ali Sabieh	Sugar	88	104	92	112	KG	Low
Retailer	Ali Sabieh	Sugar	88	0	92	0	KG	Low
Retailer	Ali Sabieh	Sugar	86	104	92	112	KG	Low
Retailer	Ali Sabieh	Sugar	88	104	92	112	KG	Low
Retailer	Ali Sabieh	Sugar	84	100	100	112	KG	Low
Retailer	Ali Sabieh	Sugar	96	110	104	122	KG	Low
Retailer	Ali Sabieh	Sugar	86	100	120	140	KG	Low
Retailer	Ali Sabieh	Sugar	96	100	108	112	KG	Low

Retailer	Ali Sabieh	Sugar	88	0	92	0	KG	Low
Retailer	Ali Sabieh	Sugar	90	0	94	0	KG	Low
Retailer	Ali Sabieh	Sugar	84	92	88	96	KG	Low
Retailer	Ali Sabieh	Sugar	86	96	90	100	KG	Low
Retailer	Ali Sabieh	Sugar	88	104	92	112	KG	Low
Retailer	Ali Sabieh	Sugar	88	104	92	112	KG	Low
Retailer	Ali Sabieh	Sugar	88	104	92	112	KG	Low
Retailer	Ali Sabieh	Sugar	88	104	92	112	KG	Low
Retailer	Ali Sabieh	Sugar	88	104	92	112	KG	Low
Retailer	Ali Sabieh	Sugar	88	106	92	112	KG	Low
Retailer	Ali Sabieh	Sugar	90	90	96	96	KG	Low
Retailer	Ali Sabieh	Sugar	90	96	100	104	KG	Low
Retailer	Ali Sabieh	Sugar	264	300	360	420	KG	Low
Retailer	Ali Sabieh	Sugar	180	220	240	280	KG	Low
Retailer	Ali Sabieh	Sugar	270	330	360	420	KG	Low
Retailer	Ali Sabieh	Sugar	90	90	100	100	KG	Low
Retailer	Ali Sabieh	Sugar	100	100	120	120	KG	Pas de reponse
Retailer	Ali Sabieh	Sugar	90	100	102	114	KG	Stable
Retailer	Ali Sabieh	Sugar	88	104	92	112	KG	Stable
Retailer	Ali Sabieh	Sugar	90	100	102	112	KG	Stable
Retailer	Ali Sabieh	Sugar	86	0	98	0	KG	Stable
Retailer	Ali Sabieh	Sugar	89	0	101	0	KG	Stable
Retailer	Ali Sabieh	Sugar	100	100	120	120	KG	Stable
Retailer	Ali Sabieh	Sugar	100	100	120	120	KG	Stable
Retailer	Ali Sabieh	Sugar	100	100	120	120	KG	Stable
Retailer	HH hote	Sugar	96	104	108	112	KG	Low

Retailer	HH hote	Sugar	88	104	92	112	KG	Low
Retailer	HH refugeie	Sugar	84	100	96	112	KG	High
Retailer	HH refugeie	Sugar	84	0	96	0	KG	High
Retailer	HH refugeie	Sugar	92	0	128	0	KG	High
Retailer	HH refugeie	Sugar	88	0	118	0	KG	High
Retailer	HH refugeie	Sugar	88	104	92	112	KG	High
Retailer	HH refugeie	Sugar	88	104	92	112	KG	Low
Retailer	Obock ville	Sugar	100	0	110	0	KG	Pas de reponse
Retailer	Obock ville	Sugar	140	140	200	200	KG	Stable
Retailer	Obock ville	Sugar	110	110	160	160	KG	Stable
Retailer	Obock ville	Sugar	112	0	160	0	KG	Stable
Semi Wholesaler	Ali Sabieh	Sugar	80	124	88	132	KG	Low
Semi Wholesaler	Ali Sabieh	Sugar	88	104	92	112	KG	Low
Semi Wholesaler	Ali Sabieh	Sugar	100	100	120	120	KG	Pas de reponse
Semi Wholesaler	Ali Sabieh	Sugar	82	94	84	100	KG	Stable
Semi Wholesaler	Ali Sabieh	Sugar	80	80	100	100	KG	Stable
Semi Wholesaler	Ali Sabieh	Sugar	80	80	100	100	KG	Stable
Semi Wholesaler	Obock ville	Sugar	120	100	150	130	KG	Low
Retailer	AA refugeie	Meat	280	200	192	224	KG	Low
Retailer	AA refugeie	Meat	320	160	170	170	KG	Stable
Retailer	Ali Sabieh	Meat	48	24	28	30	KG	High
Retailer	Ali Sabieh	Meat	440	160	250	210	KG	Low
Retailer	Ali Sabieh	Meat	56	28	30	30	KG	Stable
Retailer	HH refugeie	Meat	408	300	250	350	KG	Low
Retailer	Obock ville	Meat	32	28	28	32	KG	High