

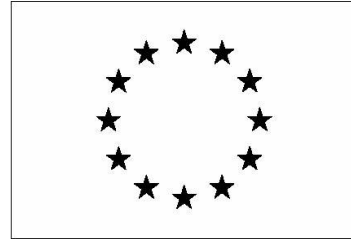
Youth Employment and Livelihood Survey on Skills and Market Opportunities



Mogadishu, Somalia | November 2012



FORCIER CONSULTING



Youth Employment & Livelihood Survey on
Skills & Market Opportunities

Mogadishu, Somalia

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ILO - Somalia

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Acronyms

CAAFAG	Children Associated with Armed Forces and Armed Groups
DRC	Danish Refugee Council
FGD	Focus Group Discussion
GDP	Gross Domestic Product
IDP	Internally Displaced Persons
ILO	International Labour Organisation
ILO TREE	International Labour Organisation Training for Rural Economic Empowerment
NGO	Nongovernmental Organisation
SREN	Somalia Research and Education Network
UNHCR	United Nations High Commissioner for Refugees
UNICEF	United Nations

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Executive Summary

This report on Youth Employment and Livelihood Survey on Skills and Market Opportunities is in contribution to a joint project between the ILO and UNICEF that seeks to support the sustainable economic reintegration of children associated with armed forces and armed groups (CAAFAG) in South Central Somalia. The report complements existing assessments of marketable skills and wage employment opportunities from Save the Children and the Danish Refugee Council (DRC), and examines current gaps in the market as well as identifies areas of the economy with promising potential for future growth. The districts covered by the market survey are Wadajir, Whardigle, Waaberi, and Halwadag.

Particular focus was placed on identifying gaps and opportunities in the market by highlighting unsatisfied demand for products and services wherever possible. A summarised version of the findings and recommendations are as follows.

Wadajir Market:

Satisfaction levels for almost all goods in Wajadir market were high; especially strong satisfaction with milk and poultry products suggests that training in these industries would not be necessary. Local products were found to have higher satisfaction levels than products from alternative sources. Dissatisfaction rates for goods remained below 10.0%, and where present, a “lack of supply” was cited as the main cause of unhappiness and indicates a valid intervention point.

Similarly, satisfaction with services was generally high, although minivan and minibus services elicited strong responses of dissatisfaction, at 66.6% (n=20) and 63.3% (n=19) respectively. Safety, overcrowding, and timeliness were the prime areas of concern. Addressing these needs would be beneficial and feasibly done through the greater provision of vehicles; targeted driving-safety training may be appropriate, but its value should be considered within the context of broader driving norms.

There were found to be vocational training needs for plumbers and electricians; however, any training schemes are advised not to focus on generator repair as there were found to be low demand and few job opportunities here.

Dramatic increases in business start-up costs, where the current estimations of financial needed are around USD2000, are a crucial barrier to starting or expanding businesses; most who have done so, managed by using personal savings. There is definite will to expand businesses, as cited by 76.9% (n=10) of respondents and therefore improving the availability of credit, either through lending organisations or NGO microfinance schemes, should be prioritized. There are gaps in the wholesale business and a lack of supplies and suppliers.

Waaberi Market

In terms of market goods, there were significant levels of dissatisfaction in this market. Nearly a quarter, 23.3% (n=7), of respondents were unhappy with aspects of milk and poultry quality, while high prices of butter and honey also provoked dissatisfaction. Dissatisfaction with butchered poultry was strong, although the reasons why were unclear and low consumption of the product makes it difficult to ascertain if a market gap really exists here. Overall, the high price of goods may offer the chance for wholesale marketing, but further efforts should be made to understand why costs are so high and assess whether underlying supply issues are transferring costs unduly to consumers.

Further research should also focus on the clothing area; there were low purchase levels of locally made clothes (50.0%, n=15) and this is a definite gap in the market. Tailors are commonly used (93.3%, n=28) but there is high dissatisfaction with the quality of their work. Professional training and proper equipment may well benefit this sector but the sustainability of such action in Waaberi market should be better established.

Dissatisfaction with transport services – namely the minivans and minibuses – was strong, particularly because of overcrowding and a perceived lack of safety. While most respondents frequented restaurants, dissatisfaction was relatively high at 43.4% (n=13); this could be an interesting area to promote young entrepreneurship, especially if combined with hygiene training. The latter point has been raised as a concern amongst consumers and could be a potentially strong selling point of an enterprise. Unmet demand for restaurants is further substantiated by findings from the DRC report on vocation skills training.

Vocational training was not widespread, and only 53.3% of respondents had received some form of training. Start up costs were high; most respondents (73.3%, n=11) estimated that a minimum of USD1000 was needed to set up a business. While there are potential openings for young people to enter business in this market, a lack of lending organisations will hinder this; of those who have set up businesses, 60.0% (n=9) did so by gathering money from family or friends. Lending services are a crucial area to target.

The supply of goods was considered problematic by traders, who were hindered by a lack of suppliers and a lack of goods. The underlying reasons for this deficit should be explored before encouraging new businesses or attempting to realize the extension ambitions that all (n=15) current traders professed.

Halwadag Market

Overall, there were low satisfaction rates with goods available in this market. In particular, there was dissatisfaction regarding the high price of flour (26.7%, n=8), locally made wood products and furniture (16.7%, n=5), toiletries (13.3%, n=4), and imported clothes and footwear (13.3%, n=4). This indicates the potential for further competition in these areas, which would provide employment and decrease prices. There may be a case for further research into discovering why prices are so high.

In keeping with other markets, high levels of dissatisfaction were expressed regarding minivans and minibuses, whereby they were considered too expensive and too few. It is clear that an expansion of these services is needed and a greater availability of lending organisations would provide the capital needed to do so. It is possible that further training into auto repair services would be feasible as the area elicited high dissatisfaction surrounding price and lack of supply. Filling this gap with trained technicians would be beneficial if sufficient demand can be more firmly ascertained. There was 98.7% (n=29) dissatisfaction with restaurants, which are considered too expensive; areas such as this and computer technicians are highlighted as potential gaps but need to be researched on a broader scale before determining further action.

Start-up costs are high, estimated at around USD 1000, although unlike in other markets, respondents claimed that this is not a change from previous costs. The desire to expand business is undermined by barriers to financial capital and credit. In addition, traders complained of being unable to meet customer demand for goods due to a lack of suppliers and low quantities of goods available.

Whardigle Market

In this market there were high satisfaction levels with fresh, local milk, and as such there are possibilities for extension industries such as yoghurt making, which would be an interesting gap for young entrepreneurs to explore. Further research would be needed in order to assess market demand for such products. Dissatisfaction with local fruit was found to be extremely high among 96.8% (n=30) of respondents.

As with all other markets, transport services were a strong cause for complaint as 62.5 % (n=20) and 69.4% (n=19) of respondents were dissatisfied with minibus and minivan services, respectively. The prime complaint was a shortage of supply, suggesting that further investment in acquiring vehicles and training drivers would be worth further investigation.

There were low expectations for increased employment by traders, indicating a potential problem with employment drives. Like the other markets, traders cited supply difficulties, although a financial dimension was added to Whardigle traders' reasons as they claimed an inability to afford the goods. This highlights the need for further credit services.

Start up costs are reported to have risen from USD500 to over USD1-2000, and in light of lacking lending organisations, most used personal savings to set up their businesses. However, unlike other areas, 13.7% (n=3) traders had sought microfinance and NGO financial assistance for their activities. These services should be investigated to ascertain if links with ILO can be established.

To sum up some of the key points and recommended areas of focus:

- Several potential gaps and areas of growth have been identified within each market place; however, further research needs to be conducted to establish if the gaps are real, the reasons for such, and to assess the demand for products and services that are currently lacking in quality or supply.
- Investigate the supply side of the business cycle to better understand supply shortages and assess the potential of wholesale retailing in each market context.
- As transport dissatisfaction is widespread, investing in more vehicles and drivers would allow for more regular service and increase employment. The ability to do so is linked to financial capability.
- Options for providing lending and loan services should be promoted as demand is high and universal. Partnerships with other NGO or microfinance organisations should also be explored, in order to assist the youth with high start up costs.

1 Introduction

The Republic of Somalia has been in a state of chaos and war since 1991 when the then president, Mohamed Siyad Barre, was deposed to Nigeria. Fighting has continued in Somalia for over 21 years which has destroyed the country and created large exoduses of both human and economic capital. This conflict has also created one of the largest humanitarian crises in the Horn of Africa and made Somalia one of the poorest countries in the world with a GDP per capita of about \$284 and with poverty rates at 61% in urban areas, 80% in rural areas, and 73% overall.¹ The population of Somalia was estimated to be 7.5 million in 2005.² Somalia also generates the third highest number of refugees in the world (after Iraq and Afghanistan). According to UNHCR, in November 2012, there were over one million refugees in the region mainly hosted in Kenya, Egypt, Ethiopia, Eritrea, Djibouti, Tanzania and Uganda and almost 1.36 million Somalis who were internally displaced, settled mainly in South Central Region.³

Somalia's capital, Mogadishu, has long been a contested city and the epicentre of conflict during the decades of war in Somalia. Mogadishu, a cosmopolitan city with strategic importance, became the stage for warring clan leaders who divided the city according to clan lines. However, with the withdrawal of Al-Shabab fighters in August 2011, the security situation has markedly improved. The creation of a new Parliament and an elected president have further bolstered this progress, notably in Mogadishu where the past six months have brought hopes of stability for Somalis and the broader region. This hope is somewhat supported by the improved access of humanitarian aid agencies, as well as increased economic activity and improved access to markets.⁴

Despite the recent improvements in security, Somalia continues to face a variety of other internal problems. Currently, around 25% of the population has access to basic health care services, and only 28% of school age children and youth attend school as a result of civil strife, insecurity, droughts, recurrent floods, and the economic crisis. In Mogadishu, both IDPs and their host communities are in need of emergency support in the form of the distribution of food, water, and drugs.⁵

Somalia is divided into 18 regions, with the city of Mogadishu (also known as Hamar) being located in the region of Banadir. Mogadishu itself is composed of 16 districts, four of which are the subjects of this survey. Each market is discussed briefly in the findings sections to contextualize the data gathered as part of this assessment.

¹ Somalia Human Development Report 2012 – UNDP Somalia

² Confirm citation – UNDP 2005.

³ Somalia Fact Sheet – November 2012 - UNHCR

⁴ 2011/2012 Post Deyr Analysis – FSNAU 2012

⁵ Agenzia Italiana Riposta Emergenze

2 Purpose of Assessment & Methodology

2.1 Objectives

The purpose of this survey is to provide the two projects with sufficient information to advise the youth on promising opportunities for starting businesses and obtaining jobs in Mogadishu, and advise them on the skills needed to do so. The work will examine the current gaps in the market, as well as explore promising areas of future growth, assuming that the current improvement in security of Mogadishu continues.

2.2 Methodology

Utilizing the traditional ILO TREE market assessment model, tailored to the Somali context, quantitative data was collected through a consumer-demand survey and market opportunity survey. In-depth interviews were also carried out with retailers and business owners randomly selected from within the markets serving Wadajir, Whardigle, Waaberi and Halwadag. Quotas were set at 30 consumers from each location (total 120) and 15 businesses from each location (total 60).

Consumers were selected from within the market place utilizing purposive random sampling, with data collectors alternating between male and female interviewees. Market demand surveys were conducted with shops and businesses within the market place, also utilizing purposive random sampling to ensure that the sample is diverse by sector and industry type.

The following observations were made.

Table 1: Quotas by location and survey type, Mogadishu, Somalia (November 2012)

	Wadajir	Whardigle	Waaberi	Halwadag	Total
Consumer Demand	30	30	32	30	122
Market Opportunity	15	15	15	15	60

Quantitative data was collected on IDEOS Smartphones operating EPISurveyor, a technology which reduces human error by programming skip patterns and question logic while eliminating the need for data entry. Ten enumerators (six male, four female) were recruited through the partner organization Somalia Research and Education Network (SREN), who also participated on a three day training workshop on market assessments. It is anticipated that these enumerators will be able to conduct similar work in the future.

Qualitative focus group discussions were held with community leaders, young adolescents (15-17 years), and youths (18-30 years). FGDs were held separately with young men and young women in order to explore gender issues within the livelihood context. In-depth interviews were also conducted with relevant government authorities and stakeholders. Qualitative interviewees were recruited with the assistance of ILO and project staff. Business owners were selected for interview representing a diverse range of sectors and services.

All qualitative interviews were conducted based on approved semi-structured interview guides in Somali. Three research assistants were recruited from the training workshop participants in order

to execute these interviews.

Findings were triangulated by respondent type and methodology. Qualitative data was coded and referenced and quantitative data cleaned, coded and analysed using STATA.

2.3 Limitations

Due to safety reasons in the district of Mogadishu, it was necessary to team up the enumerators (two per team). To some extent, a number of the business owners as well as the consumers interviewed for the study had some expectations of support from the enumerators. This prompted the enumerators to take time to explain the purpose of the study and how the outcomes would be utilized, which seemed satisfactory to those who were interviewed. At the time of this assessment there were some security issues in the district of Mogadishu and some persons were therefore uncomfortable in taking part in the assessment. Due to these security concerns, getting stakeholders together to conduct focus group discussions in the market areas was impossible as people were afraid of being a target for Al-Shabab. To overcome this difficulty, these discussions were carried out in relatively safe places with security, such as universities; however, this had the disadvantage of limiting the number of stakeholders participating.

3 Socio-Demographic Profile of Respondents

While the aim of the assessment was to have an even gender distribution among respondents, this was not always possible at the time the survey was being administered. As Figure 1 indicates, overall gender distribution was near equal with female respondents making up 43.4%, (n= 53) of respondents; Waaberi and Halwadag however, had a disproportionate number of male respondents (70.0%, n=21; 76.7%, n=23 respectively). In all markets, the vast majority of respondents were between the ages of 18-24, as indicated in Figure 2.

Figure 1: Gender Distribution of Consumer Demand Respondents by Market, Mogadishu (November 2012)

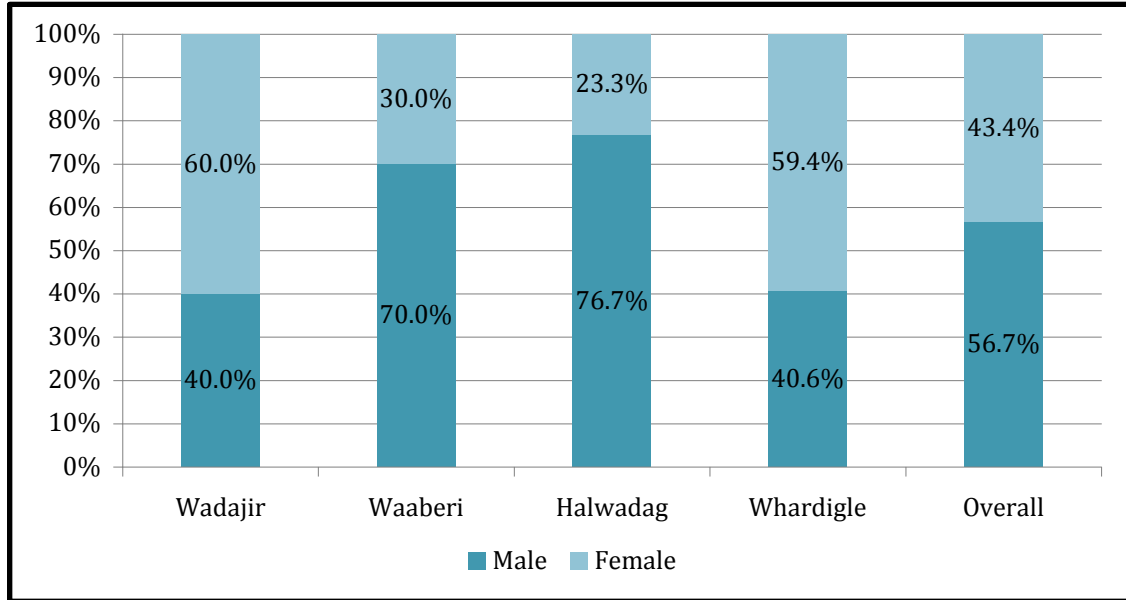
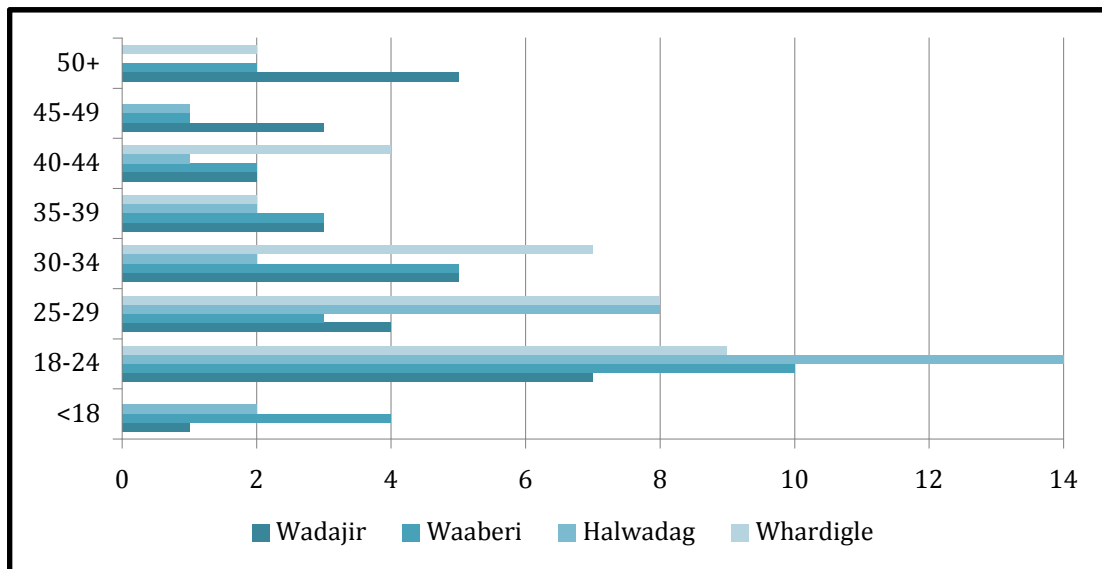
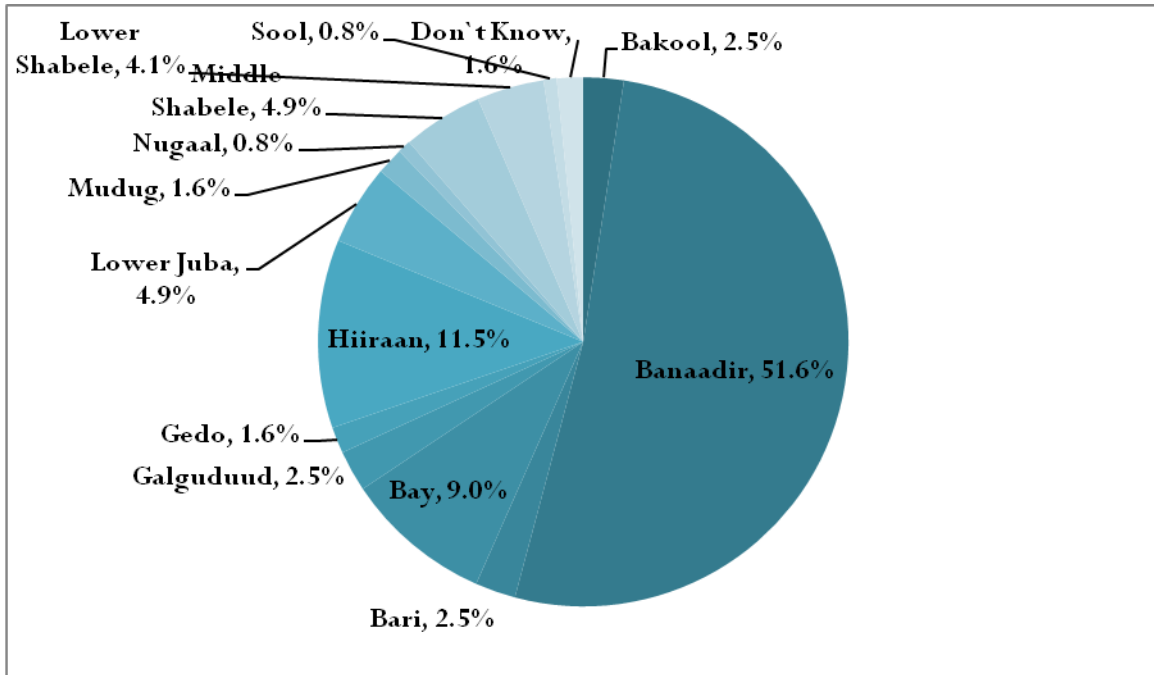


Figure 2: Age Brackets of Consumer Demand Respondents by Market, Mogadishu (November 2012)



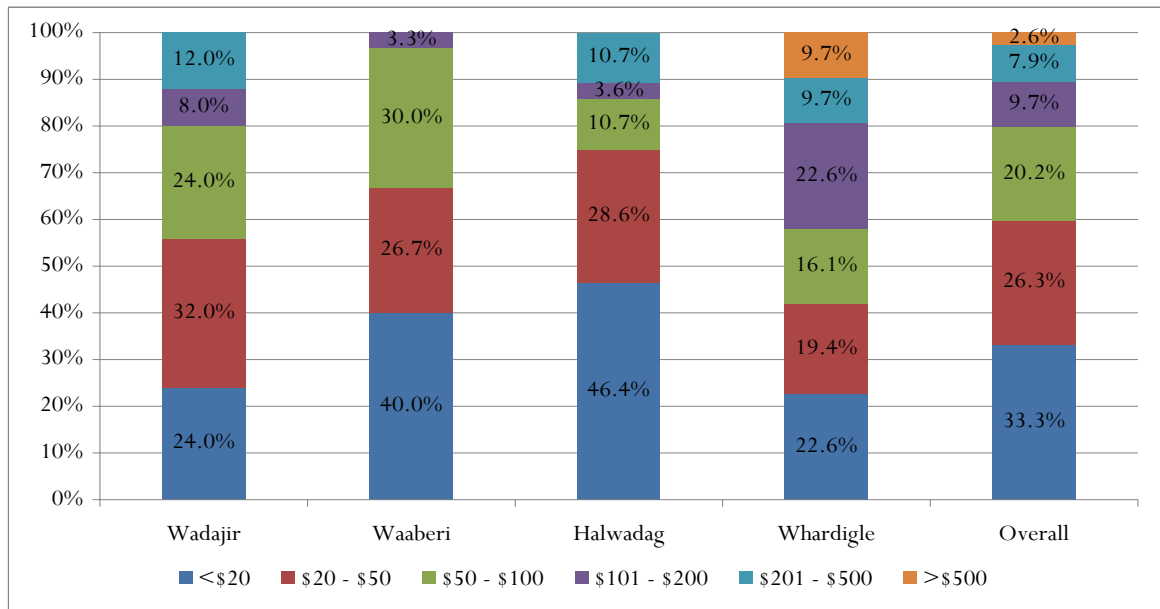
Only half of respondents interviewed were from Banaadir Region (51.6%, n=53), with an additional 11.5% (n=14) from Hiiran and 9.0% (n=11) from Bay Region. Figure 3 demonstrates the region of origin for consumer demand respondents in all markets.

Figure 3: Origin of Consumer Demand Respondents, All Markets, Mogadishu (November 2012)



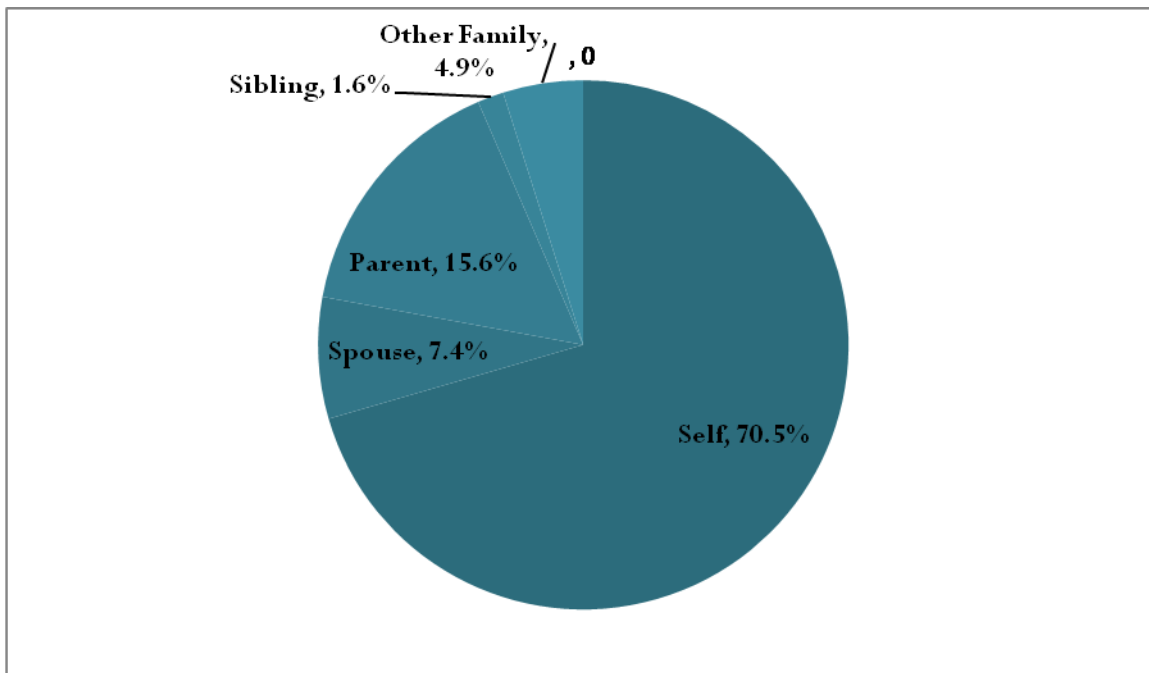
Data was also collected on the average weekly income of the consumer demand respondents in each market. Data revealed that Halwadag market tends to cater to a slightly lower income client, with almost half (46.4%, n=13) of consumers earning less than USD20 per week. Conversely, Whardigle consumers were more likely to have a higher average weekly income, with 9.7% (n=3) indicating a weekly income of USD500 or more. This distinction is important in comparing different market opportunity for various skills, as discussed in Section 4.

Figure 4: Average Weekly Income of Consumer Demand Respondents by Market, Mogadishu (November 2012)



The vast majority of respondents indicated that their income came from their own earnings (70.5%, n=86), of which 39.5% (n=34) were female. Only 7.4% (n=9) indicated the income was from their spouse, 77.8% (n=7) of which were female. An additional 15.6%, (n=19) indicated the money came from their parents; the average age of those respondents were 29.9 years.

Figure 5: Source of Income, All Markets, Mogadishu (November 2012)



There were variances in the gender composition of respondents in each four markets. While Whardigle had a relatively even balance of male and female respondents (46.7%, n=7 and 53.3%, n=8 respectively), there was a total bias in Halwadag where 100.0% (n=15) of respondents were male, and another significant imbalance in Wadajir where 75.0% (n=9) respondents were female.

Table 2: Gender of Respondents in Market Survey, Mogadishu (November 2012)

Market	Male (n)	%	Female	%
Wadajir	3	25.0	9	75.0
Waaberi	12	80.0	3	20.0
Halwadag	15	100.0	0	0.0
Whardigle	7	46.7	8	53.3

4 Market Assessments

4.1 Wadajir Market

High rates of satisfaction were reported by respondents in Wadajir market regarding milk (Powdered: 73.3%, n=22; UHT: 56.7%, n=17; Fresh Milk: 83.3%, n=25; and Yoghurt: 66.7%, n=20) and poultry products (Eggs: 93.3%, n=28; Live Poultry: 63.3%, n=18; and Slaughtered Poultry: 66.7%, n=20), indicating that this would not be an area in which to engage for training or business development. In fact, satisfaction rates for goods in the Wadajir market were high for nearly every product; imported fruit, imported vegetables, charcoal, fresh bread, and imported clothes and footwear garnered the highest rates of dissatisfaction (each at 10.0%). However, for each of these items respondents still reported being overwhelmingly satisfied with the product (compared to the rate of dissatisfaction). In terms of imported fruit and imported vegetables, dissatisfaction for these products could be explained in part by the high levels of satisfaction for local fruit (92.9%, n=26) and local vegetables (93.3%, n=28).

While satisfaction for imported clothing and footwear (90.0%, n=27) was much higher than for local (63.3%, n=19) or second-hand (66.7%, n=20) clothing and footwear, training programs in tailoring have been found to be unsustainable over the long-term and thus not an area that is suitable for engagement.

Table 3: Consumption and Satisfaction Rates of Goods, Wadajir Market, Mogadishu (November 2012)

Good	Non-Consumption		Satisfaction		Dissatisfaction	
		%		%		%
Powdered Milk, NIDO	6	20.0	22	73.3	2	6.7
UHT or Packet Milk	12	40.0	17	56.7	1	3.3
Milk (fresh)	4	13.3	25	83.3	1	3.3
Yogurt	10	33.3	20	66.7	0	0.0
Eggs	1	3.3	28	93.3	1	3.3
Poultry (live)	11	36.7	18	63.3	0	0.0
Poultry (slaughtered)	8	26.7	20	66.7	2	6.7
Meat (goat or cow)	1	3.3	28	93.3	1	3.3
Butter/Ghee	10	33.3	20	66.7	0	0.0
Animal Fats & Cooking Oils	4	13.3	24	80.0	2	6.7
Honey	8	26.7	21	70.0	1	3.3
Nuts/Loos	4	13.3	25	83.3	1	3.3
Fruit (local)	2	7.1	26	92.9	0	0.0
Fruit (imported)	9	30.0	18	60.0	3	10.0
Vegetables (local)	1	3.3	28	93.3	1	3.3
Vegetables (imported)	9	30.0	18	60.0	3	10.0
Juice (fresh)	2	6.7	27	90.0	1	3.3
Juice (packaged)	8	26.7	22	73.3	0	0.0
Grains (local)	4	13.3	26	86.7	0	0.0
Grains (imported)	8	26.7	20	66.7	2	6.7
Flour	0	0.0	30	100.0	0	0.0
Charcoal	3	10.0	24	80.0	3	10.0
Bread (fresh)	1	3.3	26	86.7	3	10.0
Baked Goods (cakes, buns)	7	23.3	21	70.0	2	6.7
Sweets (xalwo, candies)	3	13.3	26	86.7	0	0.0
Prepared/Processed Food Products	7	23.3	23	76.7	0	0.0
Shetaro (sambuus, bur, bajiye)	4	13.3	26	86.7	0	0.0
Locally-Made Metal Goods & Furniture	5	16.7	24	80.0	1	3.3
Locally Made Tools (incl. Agric)	9	30.0	21	70.0	0	0.0
Locally Made Wood Products & Furniture	3	10.0	26	86.7	1	3.3
Locally-Made Straw Products	9	30.0	20	66.7	1	3.3
Spare Parts for Bikes, Cars, Bodas	13	43.3	16	53.3	1	3.3
Toiletries & Beauty Items	4	13.3	24	80.0	2	6.7
Locally Made Clothes & Footwear	9	30.0	19	63.3	2	6.7
Imported Clothes & Footwear	0	0.0	27	90.0	3	10.0
Second-hand Clothes & Footwear	8	26.7	20	66.7	2	6.6
Cloth & Sewing Items (inc. Laows)	3	10.0	26	86.7	1	3.3

Table 4: Most Commonly Consumed Goods, Wadajir Market, Mogadishu (November 2012)

Goods	n=x	%
Flour	30	100.0
Imported Clothes & Footwear	30	100.0
Eggs	29	96.7
Meat (goat or cow)	29	96.7
Vegetables (local)	29	96.7
Bread (fresh)	29	96.7
<i>Imported Clothes & Footwear and bread (fresh) are bolded because they are also on the list of the goods with the highest rates of dissatisfaction in Wadajir Market</i>		

Table 5: Goods with Highest Associated Dissatisfaction, Percent of Consumers with Primary Reasons for Dissatisfaction, Wadajir Market, Mogadishu (November 2012)

Good	Dissatisfied	Primary Reasons for Dissatisfaction
Charcoal	10.0%	<i>Lack of Supply, Too Expensive, Poor Quality</i>
Bread (fresh)	10.0%	<i>Lack of Supply, Too expensive</i>
Vegetables (imported)	10.0%	<i>Lack of Supply</i>
Fruit (imported)	10.0%	<i>Lack of Supply</i>
Baked Goods	6.7%	<i>Lack of Supply</i>
Grains (imported)	6.7%	<i>Lack of Supply</i>
Animal fats and cooking oils	6.7%	<i>Too Expensive, Poor Quality</i>
Poultry (slaughtered)	6.7%	<i>Lack of Supply</i>
Powdered Milk, NIDO	6.7%	<i>Lack of Supply</i>

In general, the dissatisfaction ratings for services at Wadajir market were low, with only four registering more than 10.0%. Of areas of dissatisfaction, the Minibus and Minivan services were the highest by far, at 66.6% (n=20) and 63.3% (n=19) respectively. Both of these services were used by all of the respondents, indicating a high demand for these services. In the case of the Minibus, or Koostar, the biggest reason for dissatisfaction was lack of punctuality, with 43.3% (n=13) of respondents expressing their disappointment. Researcher observations indicate that these services are very crowded. These two observations combined suggest that there is a lack of vehicles operating as Koostars, and that there may be room for more Koostar operators around this market.

The major reason for dissatisfaction of the Minivans (Caasis) was unsafe driving, with 23.3% of respondents (n=7) stating this. It is possible that training could be given on driving safely and economically.

Plumbers had attracted a high dissatisfaction rating of 20.0%, which fares badly against a satisfaction rating of only 56.7%. Both expense and poor quality featured as the main reasons for dissatisfaction

(with two responses for each, or 6.7%). The quality of the plumbers work could be improved with additional training. It is also possible the quality of work could be improved with access to better materials or tools. Dissatisfaction with electricians was 13.3% (n=4), with most of those objecting citing poor customer service as their reason (10.0%, n=3). There is an apparent need for vocational training within the trades of plumber and electrician around Wadajir Market. However, this training should be targeted on these two trades, and not the related service of generator repair. With a high non-consumption rate (50.0%, n=15) it might appear that there is a possibility of increasing the use of this service and opening up a market for employment. However, the researchers observed a lack of generator use in the market area. Job opportunities in servicing generators are limited.

Table 6: Consumption and Satisfaction Rates of Services, Wadajir Market, Mogadishu (November 2012)

Service	Non-Consumption		Satisfaction		Dissatisfaction	
		%		%		%
Minibus (Koostar)	0	0.0	10	33.3	20	66.6
Minivan (Caasi)	0	0.0	11	36.7	19	63.3
Appliance Repair	14	46.7	15	50.0	1	3.3
Generator Repair Technician	15	50.0	14	6.7	1	3.3
Motorbike/Vehicle Mechanic	19	63.3	11	36.7	0	0.0
Photographer/Videographer	5	30.0	24	80.0	1	3.3
Electrician	8	26.7	18	60.0	4	13.3
Blacksmith or Welder	12	40.0	18	60.0	0	0.0
Computer Technician	19	63.3	10	33.3	1	3.3
Mason or Bricklayer	11	36.7	17	56.7	2	6.7
Plumber	7	23.3	17	56.7	6	20.0
Construction Worker	10	33.3	18	60.0	2	6.7
Shetaro or Baked Goods	4	13.3	26	86.7	0	0.0
Cut Fruit or Vegetables	7	23.3	23	76.7	0	0.0
Restaurant	8	26.7	20	66.7	2	6.7
Tea Shop	4	13.3	23	76.7	3	10.0
Caterer	13	43.3	16	53.3	1	3.3
Dobbi or Clothes Washer	8	27.59	21	72.41	0	0.0
Wood/Sand/Straw Collector	10	33.3	19	63.3	1	3.3
Dairy Farmer	10	33.3	20	66.7	0	0.0
Water Collector/Deliverer	18	60.0	11	36.7	1	1.3
Split Rocks/Gravel	22	73.3	6	20	2	6.7
Barber	9	30.0	19	63.3	2	6.7
Beautician	6	20.0	22	73.3	2	6.7
Tailor	7	23.3	23	76.7	0	0.0

Table 7: Most Commonly Consumed Services, Wadajir Market, Mogadishu (November 2012)

Service	n=x	%
Minibus (Koostar)	30	100.0
Minivan (Caasi)	30	100.0
Shetero or Baked Goods	26	86.7
Tea Shop	26	86.7
Photographer/Videographer	25	83.3
Beautician	24	80.0

Table 8: Services with Highest Associated Dissatisfaction, Percent of Consumers with Primary Reasons for Dissatisfaction Wadajir Market, Mogadishu (November 2012)

Service	Dissatisfied	Primary Reason for Dissatisfaction
Minibus (koostar)	66.6%	Lack of Punctuality
Minivan (caasi)	63.3%	Unsafe Driving
Plumber	20.0%	Too Expensive, Poor Quality
Electrician	13.3%	Poor Customer Service

The majority of market trader respondents sold their products to customers (83.3%, n=10). Only one (8.3%) sold products to another shop, and one (8.3%) other sold products their products on to traders. This indicates that the vast majority of trade in Wadajir market is customer based.

Traders do have to buy their materials or products from other wholesalers. When asked, the majority of respondents (83.3%, n=10) were happy with the traders that supplied them.

Table 9: Competitiveness, and Reason for Non-Competitiveness, Wadajir Market, Mogadishu (November 2012)

Yes n	%	If not, main reason
9	75.0	Less quantity (n=1), less variety (n=1), Other (n=1)

The cost of setting up a business may have risen. Respondents were asked how much money their business had required to set up, and how much it would cost to set up now. The traders believe the

costs have increased over time. A quarter, 25.0% (n=3), indicated that their business had cost USD100 or less to start up, but none would say that was possible now. The number of traders indicating the start up cost was over USD2000 rose from one (8.3%) to six (50%). This may indicate an underlying problem of start up capital being high for any new business or young entrepreneur setting up in this market. The majority of respondents (75.0%, n=9) had indicated that they had set up their business with their own savings (see table below). If the increase in set up costs is true, then this method of gaining capital may not work at the current time.

Table 10: Original Start Up Cost, Wadajir Market, Mogadishu (November 2012)

Mean Start Up Cost (US Dollars)	Respondents	%
Under 50	2	16.7
50-100	1	8.3
100-200	4	33.3
200-500	2	16.7
500-1000	1	8.3
1000-2000	1	8.3
More than 2000	1	8.3
Cannot estimate	0	0.0

Table 11: Current Start Up Cost Wadajir Market, Mogadishu (November 2012)

Mean Start Up Cost (US Dollars)	Respondents	%
Under 50	0	0.0
50-100	0	0.0
100-200	1	8.3
200-500	2	16.7
500-1000	3	25.0
1000-2000	0	0.0
More than 2000	6	50.0
Cannot estimate	0	0.0

Table 12: Source of Money for Startup Costs, Wadajir Market, Mogadishu (November 2012)

Method	Respondents	%
Personal Savings	9	69.2
Family/Friend Loan	3	23.1
Bank Loan	0	0.0
Micro Finance - NGO	1	7.7
No Start Up Funds	0	0.0

Loans are an important source of on-going capital in Wadajir market. Of the traders, 75.0% (n=9) had taken out loans for their business. Of those, the majority had taken out money from friends (55.6%, n=5). The rest came from a selection of banks, NGOs and colleagues (see table 13). It is important to note that none of the loans had come from family members.

Table 13: Loans Incurred for the Business and from Whom, Wadajir Market, Mogadishu (November 2012)

		N	%
Ever taken a loan	Yes	9	75.0
Source of the loan	Husband/Wife	0	0.0
	Parent	0	0.0
	Brother/Sister	0	0.0
	Other family member	0	0.0
	Friends	5	55.6
	Community or religious leader	0	0.0
	Bank saving or loan	1	11.1
	NGO	2	22.2
	Microfinance organization	0	0.0
	Boss or employer	1	11.1
	Community organization	0	0.0
	Professional money lender	0	0.0
	Other	0	0.0

The reasons given for the loan were overwhelmingly (76.9%, n=10) in favour of expanding the business (see table 14). This data, combined with the intention to expand outlined above, indicates that businesses are looking hopeful in Wadajir Market. However, there is little access to credit. Most of the businesses consulted (83.3%, n=10) stated that a lack of Lending Organisations was an obstacle to finding funding. If the majority of loans come from friends, it is because there are no other organisations to turn to for most of these businesses.

Table 14: Reason for taking a loan, Wadajir Market, Mogadishu (November 2012)

Reason	N	%
Expand business	10	76.9
Hire more employees	1	7.69
Buy material goods/stock	1	7.69
Buy equipment	1	7.69
Go for training personally	0	0.0
Send employees for training	0	0.0
Other	0	0.0

Table 15: Obstacles to Financing, Wadajir Market, Mogadishu (November 2012)

	N	%
No Lending Organizations	10	83.3
Do not meet eligibility requirements for lending	1	8.3
Cannot afford interest payments	0	0.0
Do not know how to apply for financing	0	0.0
Do not have the required documents to apply for financing	0	0.0
Other	1	8.3

Of the twelve respondents, six (50.0%) had taken part in vocational training, and all of them found the training useful for their current business.

The traders indicated three reasons for any inability to satisfy demand. A lack of money to buy more goods was only presented in one response (8.3%). Sources being unable to supply the quantities needed (25.0%, n=3) and ‘not having enough sources/suppliers’ (66.7%, n=9) were the biggest reasons given. This supports the conclusion that a lack of availability is a supply side problem. As the main reason given was to do with a limited number of suppliers, it is possible that a small number of suppliers may hold a monopoly or monopolies over the supply chain. This is a conclusion that would need further investigation. There may be a gap here for wholesale businesses or new transport companies to fill.

Table 16: Main reason for not Satisfying Demand, Wadajir Market, Mogadishu (November 2012)

Main Reason	Respondents	%
Not enough sources/suppliers to buy more	8	66.7
Sources cannot supply quantities ordered	3	25.0
Lack of Money to Buy More	1	8.33
Cost of Transport	0	0.0
Lack of Workers	0	0.0
Low Quality of Products	0	0.0
Design and/or Style Inappropriate	0	0.0
Other	0	0.0
Don't Know	0	0.0
Refuse to Answer	0	0.0

As shown in table 16 most businesses (91.7%, n=11) do expect to expand, and they will need more employees. The average number of new employees per expanding business is 2.8, indicating a significant potential increase in employment across the market.

Table 17: Businesses Planning to Expand and Mean Average of New Expected Employees, Wadajir Market, Mogadishu (November 2012)

Respondents	%	Average number of expected new employees per expanding business
11	91.7	2.8

4.2 Waaberi Market

In Waaberi market, one of the highest degrees of dissatisfaction was for powdered milk (36.7%, n=11). This is likely due to the high use of fresh milk and UHT milk, and is not an indicator of a training and business opportunity. The dissatisfaction with eggs is high, at nearly a quarter of respondents (23.3%, n=7) saying they were unhappy. There is a possible opportunity here with regards to product handling and provision.

The highest level of dissatisfaction was shown in regards to butchered poultry (50.0%, n=15). As there are live chickens available alongside, many respondents will not buy the butchered option (with a non-consumption rate of 50.0%, n=15). Of the respondents that bought the slaughtered poultry and expressed dissatisfaction, all of them commented on the high price of the meat. As there is a high non-consumption rate of this meat (23.3%, n=7) there is room for improvement. Additional vendors may drive down the price, reducing the income of the vendors in place but still

providing employment for additional butchers. However, the wholesale cost of the product would need to be assessed before a definite conclusion could be made on whether there is a 'gap' in the market.

Butter/ghee drew complaints from many of the respondents (30.0%, n=9), with most of those (26.7%, n=8) citing the expense as their reason for dissatisfaction. Honey had a slightly higher dissatisfaction rating (33.3%, n=10) than butter, with eight respondents (26.7%) citing expense, and two (6.7%) stating the quality of the honey as their reason for dissatisfaction. Both the Butter and Honey market may support additional vendors, which may push down the price, depending on the wholesale cost of the products. Additional training may enable the suppliers of honey to improve the quality of their product, or allow the market traders to choose better products.

The consumption of fruit is heavily biased toward consuming local fruits. Every respondent bought local fruit at the market, with 36.7% of the respondents (n=11) choosing not to buy imported fruits. The high dissatisfaction rating with imported fruits (40.5%, n=12) is likely due to the strong competition and low dissatisfaction (6.7%, n=2) of local fruits.

Clothing is an area that could benefit from further study and analysis. Of the respondents, 50.0% (n=15) did not buy locally made clothes. When taken with the low rates of non-consumption for imported (3.0%, n=1) and second hand clothes (10.0%, n=3), the market for tailored clothing appears to be small. However, the high degree of dissatisfaction with imported (46.7%, n=14) and second hand (30.0%, n=9) clothes and footwear, there may be room for tailored clothing to fill in a gap in the market. Almost half, (28.4%, n=13) of consumers were dissatisfied with imported clothing whereby 53.9% (n=7) complained of price, 23.1% (n=3) complained of poor quality, and 30.1% (n=4) felt that it was the wrong product for their needs. Dissatisfaction for second hand clothing was almost half, at 44.4% (n=4). The respondents who bought locally made clothes were satisfied with their products, as only one respondent (3.0%) expressed dissatisfaction. This would suggest that further training of existing clothes makers may not be necessary, but there may be a gap for existing tailors to fill.

Table 18: Consumption and Satisfaction Rates of Goods, Waaberi Market, Mogadishu (November 2012)

Good	Non-Consumption	%	Satisfaction	%	Dissatisfaction	%
Powdered Milk, NIDO	5	16.7	14	46.7	11	36.7
UHT or Packet Milk	16	53.3	10	33.3	4	13.3
Milk (fresh)	4	13.3	24	80.0	2	6.7
Yogurt	9	30.0	20	66.7	1	3.3
Eggs	2	6.7	21	70.0	7	23.3
Poultry (live)	15	50.0	11	36.7	4	13.3
Poultry (slaughtered)	7	23.3	8	26.7	15	50.0
Meat (goat or cow)	5	16.7	18	60.0	7	23.3
Butter/Ghee	9	30.0	12	40.0	9	30.0
Animal Fats & Cooking Oils	10	33.3	19	63.3	1	3.3
Honey	9	30.0	11	36.7	10	33.3
Charcoal	14	46.7	12	40.0	4	13.3
Nuts/Loos	4	13.3	24	80.0	2	6.7
Fruit (local)	0	0.0	28	93.3	2	6.7
Fruit (imported)	11	36.7	7	23.3	12	40.0
Vegetables (local)	1	3.3	27	90.0	2	6.7
Vegetables (imported)	12	40.0	12	40.0	6	20.0
Juice (fresh)	2	6.7	27	90.0	1	3.3
Juice (packaged)	16	53.3	10	33.3	4	13.3
Grains (local)	5	16.7	23	76.7	2	6.7
Grains (imported)	18	60.0	9	26.7	4	13.3
Flour	7	23.3	22	73.3	1	3.3
Charcoal	14	46.7	12	40.0	4	13.3
Bread (fresh)	3	10.0	26	86.7	1	3.3
Baked Goods (cakes, buns)	4	13.3	20	66.7	6	20.0
Sweets (xalwo, candies)	5	16.7	19	63.3	6	20.0
Prepared/Processed Food Products	16	53.3	12	40.0	2	6.7
Shetaro (sambuus, bur, bajiye)	3	10.0	24	80.0	3	10.0
Locally-Made Metal Goods & Furniture	14	46.7	14	46.7	2	6.7
Locally Made Tools (incl. Agric)	15	50.0	14	46.7	1	3.3
Locally Made Wood Products & Furniture	10	33.3	19	63.3	1	3.3
Locally-Made Straw Products	20	66.7	10	33.3	0	0.0
Spare Parts for Bikes, Cars, Bodas	23	76.7	5	16.7	2	6.7
Toiletries & Beauty Items	14	46.7	10	33.3	6	20.0
Locally Made Clothes & Footwear	15	50.0	14	46.7	1	3.3
Imported Clothes & Footwear	1	3.3	15	50.0	14	46.7
Second-hand Clothes & Footwear	3	10.0	18	60.0	9	30.0
Cloth & Sewing Items (inc. Laows)	16	53.3	10	33.3	4	13.4

Figure 6: Reasons for Dissatisfaction with Imported & Second Hand Clothes, Waaberi Market, Mogadishu (November 2012)

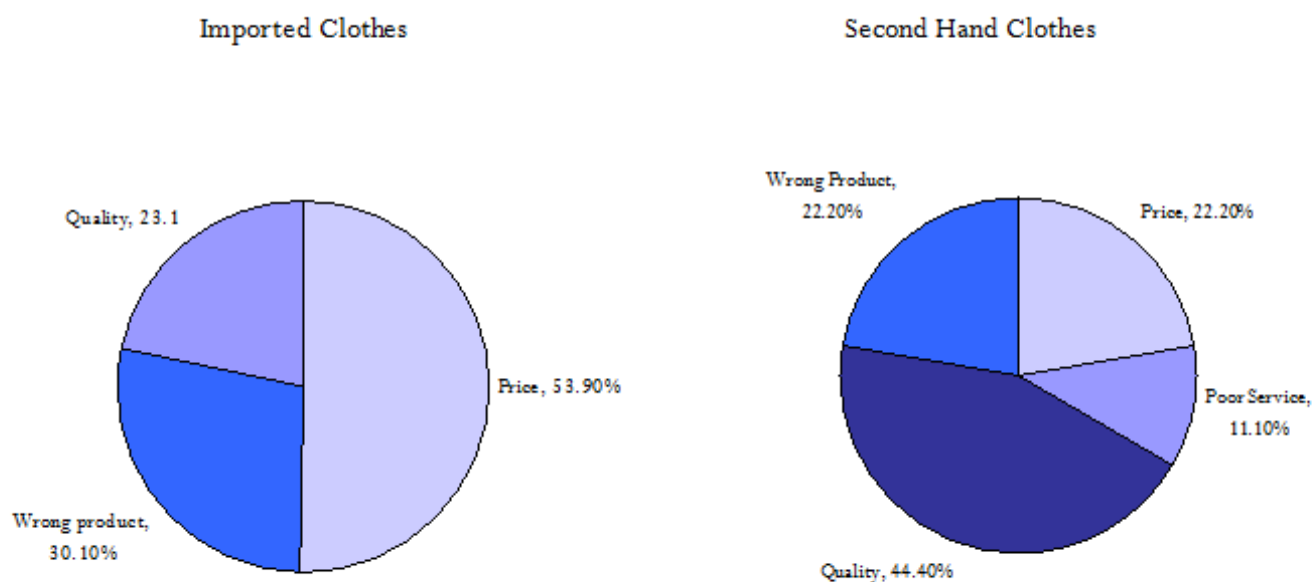


Table 19: Most Commonly Consumed Goods, Waaberi Market, Mogadishu (November 2012)

Good	n=x	%
Fruit (local)	30	100.0
Vegetables (local)	29	96.7
Imported clothes and footwear	29	96.7
Juice (fresh)	28	93.3
Eggs	28	93.3
Second-hand clothes and footwear	27	90.0

Table 20: Goods with Highest Associated Dissatisfaction, Percent of Consumers with Primary Reason for Dissatisfaction, Waaberi Market, Mogadishu (November 2012)

Good	Dissatisfied	Primary Reasons for Dissatisfaction
Poultry Slaughtered	50.0%	Too Expensive
Imported Clothes and Footwear	46.7%	Too Expensive
Fruit (imported)	40.0%	Too Expensive
Powdered Milk, NIDO	46.7%	Too Expensive
Second-hand Clothes and Footwear	60.0%	Poor Quality
Honey	33.3%	Too Expensive
Toiletries & Beauty Items	20.0%	Too Expensive
Butter	30.0%	Too Expensive
Sweets	20.0%	Too Expensive
Baked Goods	20.0%	Too expensive
Vegetables (imported)	20.0%	Too Expensive

The transport services in the market were a great cause of dissatisfaction with many respondents. The Minivan services were used by everybody, with the Minibus services being used by almost everyone (13.3%, n=4 non-consumption). However, Minibus services had a dissatisfaction rate of 50.0% (n=15), with the Minivan services achieving a higher rate (63.3%, n=19), a rate which was the highest dissatisfaction of all the services.

The reasons for the dissatisfaction varied with the service. For the Minibus service timekeeping was a major concern, with 33.3% (n=5) giving it as their main reason for dissatisfaction. For the Minivans, the largest cause of dissatisfaction was overcrowding (42.1%, n=8). Safety was an issue in both cases, but was a much more common reason for the Minibuses (33.3%, n=5) than the Minivans (5.3%, n=1). The high level of use, combined with the low level of satisfaction, suggests that the respondents use the transport services because they have very little alternative. The overcrowding of the Minivans may indicate a need for more vans and drivers, or more regular services, allowing for a reduction in the amount of users per vehicle.

The restaurants in the market were also attended by most of the respondents, with only four (13.3%) not using them. Unfortunately the dissatisfaction rating is high (43.4%, n=13). The largest problems amongst the dissatisfied responders were the lack of cleanliness (30.8%, n=4), and the price (53.8%, n=7). This suggests that extra competition could drive down the price of the restaurants, depending on the running costs of an establishment, and that there is an opportunity to train current restaurant owners in hygiene.

As outlined in the Danish Refugee Council *The Vocational Skills Training Labour Market Report*⁶, an unmet demand exists for hotel and restaurant services, particularly with respect to the provision of ready meals. Also, the report notes the high demand for snacks in restaurants, cafeterias, and teashops to be accessible between meals, a result of the tea culture in Somalia.

The results for dobbi services (hand wash service) indicate that there is need for further research. The dissatisfaction rate is high (50.0%, n=15), with the biggest complaint of the dissatisfied customers being that the services offered did not match the services they required (53.3%, n=8). The reasons for this mismatch are not clear. Further investigation into the causes of this dissatisfaction may bring attention to potential opportunities for training and development.

The tailoring service sector presents a good opportunity for training and development to make a difference. The vast majority of respondents (93.3%, n=28) used the services of a tailor, but many of the respondents were unhappy with the services (46.4%, n=13). Poor quality of work was the most commonly cited complaint (23.1%, n=3) followed by a shortage of tailoring services (15.4%, n=2). Professional training for the tailors, and possible investment in equipment, could provide large benefits in this sector.

⁶ Produced and submitted by Wilfred Thariki, ASTRADS Management Services Ltd., November 2012.

Table 21: Consumption and Satisfaction Rates of Services, Waaberi Market, Mogadishu (November 2012)

Service	Non-Consumption		Satisfaction		Dissatisfaction	
		%		%		%
Minibus (koostar)	4	13.3	11	36.7	15	50.0
Minivan (caasi)	0	0.0	11	36.7	19	63.3
Appliance Repair	9	30.0	14	46.7	7	23.3
Generator Repair Technician	22	73.3	8	26.7	0	0.0
Motorbike/Vehicle Mechanic	23	76.7	7	23.3	0	0.0
Photographer/Videographer	9	30.0	15	53.3	5	16.7
Electrician	9	30.0	12	40.0	9	30.0
Blacksmith or Welder	21	70.0	8	26.7	1	3.3
Computer Technician	14	46.7	13	43.3	3	10.0
Mason or Bricklayer	18	60.0	10	33.3	2	6.7
Plumber	14	46.7	13	43.3	3	10.0
Construction Worker	20	66.7	6	20.0	4	13.3
Shetaro or Baked Goods	9	30.0	14	46.7	7	23.3
Cut Fruit or Vegetables	16	53.3	12	40.0	2	6.7
Restaurant	4	13.3	13	43.3	13	43.4
Tea Shop	9	30.0	20	66.7	1	3.3
Caterer	24	80.0	4	13.3	2	6.7
Dobbi or Clothes Washer	6	20.0	9	30.0	15	50.0
Wood/Sand/Straw Collector	23	76.7	5	16.7	2	6.6
Dairy Farmer	20	66.7	9	30.0	1	3.3
Water Collector/Deliverer	26	86.7	4	13.3	0	0.0
Split Rocks/Gravel	25	83.3	3	10.0	2	6.7
Barber	8	26.7	15	50.0	7	23.3
Beautician	20	66.7	7	23.3	3	10.0
Tailor	2	6.7	15	53.6	13	46.4

Table 22: Most Commonly Consumed Services, Waaberi Market, Mogadishu (November 2012)

Service	n=x	%
Minivan (caasi)	30	100.0
Tailor	28	93.3
Restaurant	26	86.7
Minibus (koostar)	26	86.7
Dobbi or Clothes Washer	24	80.0
Barber	22	73.3

Table 23: Services with Highest Associated Dissatisfaction, Percent of Consumers with Primary Reason for Dissatisfaction, Waaberi Market, Mogadishu (November 2012)

Service	Dissatisfied	Primary Reason for Dissatisfaction
Minivan (Caasi)	60.0%	<i>Do Not Trust the Vendor</i>
Minibus (Koostar)	50.0%	<i>Poor Quality, Poor Customer Service</i>
Dobbi or Clothes Washer	43.3%	<i>Poor Quality</i>
Restaurant	43.3%	<i>Too Expensive</i>
Tailor	43.3%	<i>Poor Quality</i>
Electrician	30.0%	<i>Poor Quality</i>
Shetaro or Baked Goods	23.3%	<i>Too Expensive</i>
Barber	23.3%	<i>Lack of Supply</i>
Appliance Repair	23.3%	<i>Lack of Supply</i>
Photographer/Videographer	16.7%	<i>Lack of Supply</i>
Construction Worker	13.3%	<i>Lack of Supply</i>

Figure 7: Reasons for Dissatisfaction with Transportation, Waaberi Market, Mogadishu (November 2012)

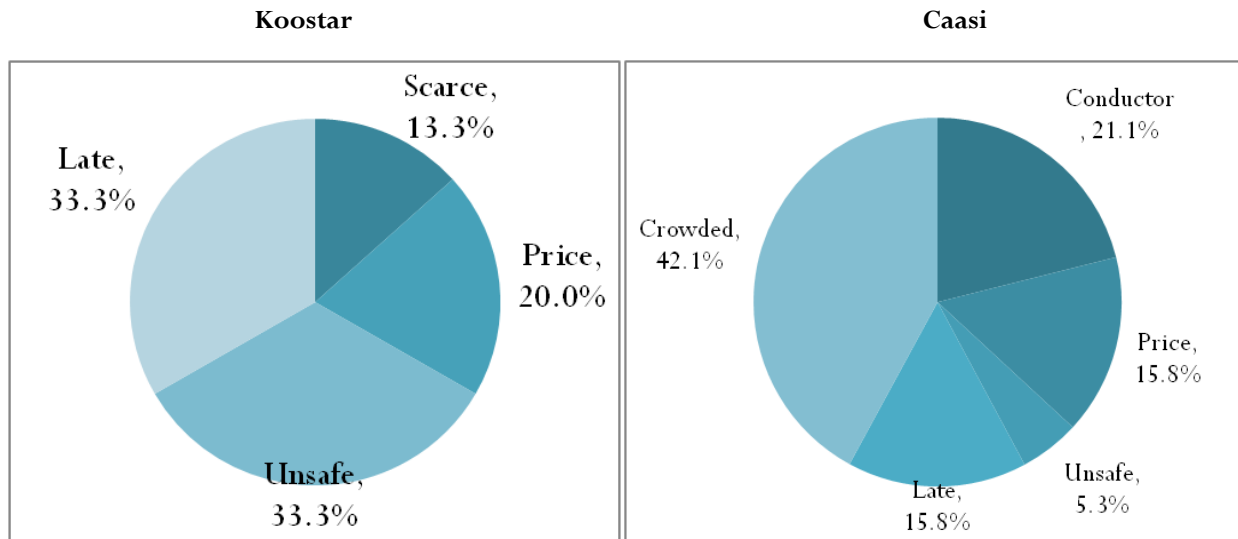


Figure 8: Reasons for Dissatisfaction with Restaurants, Waaberi Market, Mogadishu (November 2012)

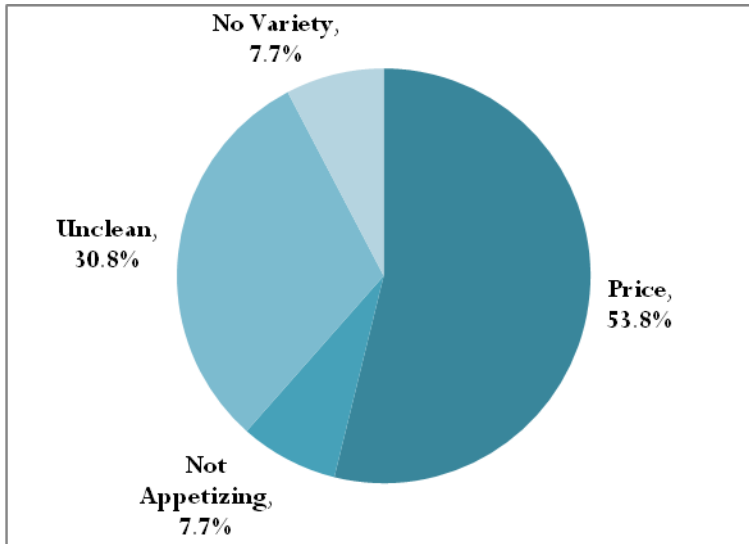


Figure 9: Reasons for Dissatisfaction with Dobbis, Waaberi Market, Mogadishu (November 2012)

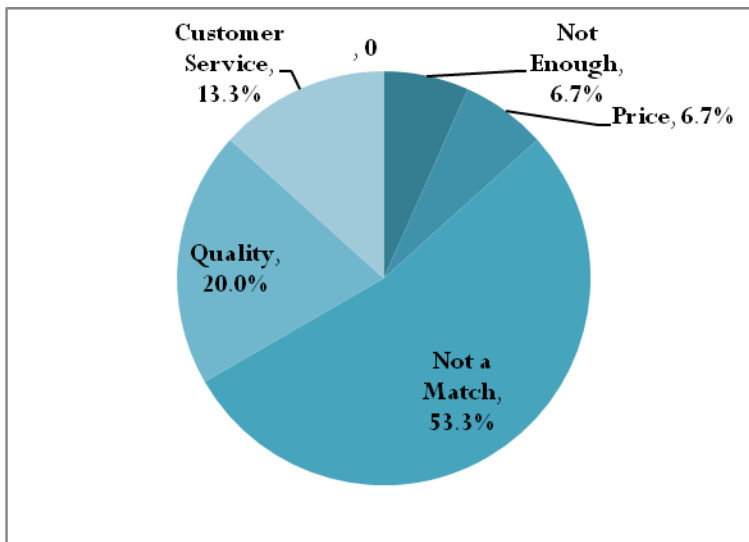
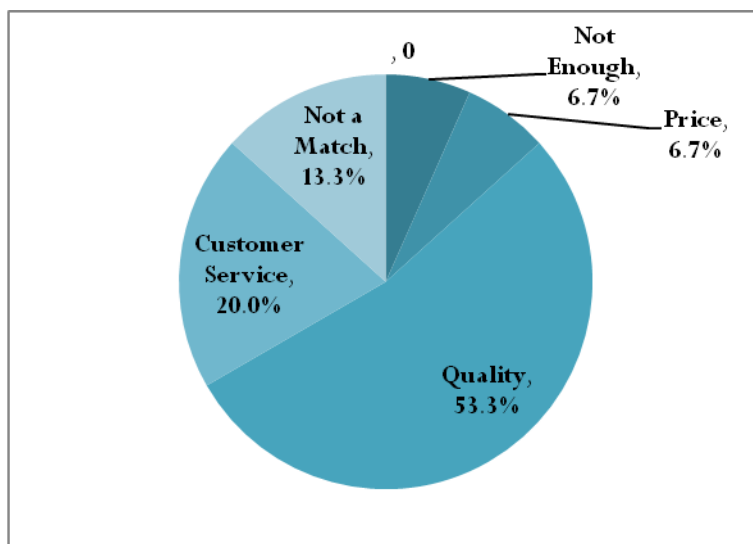


Figure 10: Reasons for Dissatisfaction with Tailors, Waaberi Market, Mogadishu (November 2012)



The respondents in Waaberi market, like Wadajir, mainly sell directly to the customer (92.7%, n=13). The majority (86.7, n=13) bought their goods from other traders and all of them were satisfied with the service they had received (see table 27).

Table 24: Who Traders Sell Finished Products / Services To, Waaberi Market, Mogadishu (November 2012)

Category	N	%
Directly to Customer	13	92.7
Other Retailer/Shop Owner	0	0.0
Traders	1	7.1
Brokers	0	0.0
Other	0	0.0
Don't	0	0.0
Refuse	0	0.0

Table 25: Market Trader Satisfaction With Traders, Waaberi Market, Mogadishu (November 2012)

Non-Consumption	Satisfaction		Dissatisfaction		
	%	%	%	%	
2	13.33	13	86.7	0	0.0

All of the traders (100.0%, n=15) felt that their businesses were competitive.

As in the case of Wadajir, the respondents indicated a large increase in the start up costs of a business. Three respondents (20.0%) indicated that their business cost less than USD200 to start

up. However, all respondents stated that setting up a business now would cost over USD1000, with most (73.3%, n=11) saying the business would cost over USD2000 to start up.

Table 26: Original Start Up Cost, Waaberi Market, Mogadishu (November 2012)

Mean Start Up Cost (US Dollars)	Respondents	%
Under 50	0	0.0
50-100	1	6.7
100-200	2	13.3
200-500	1	6.7
500-1000	1	6.7
1000-2000	1	6.7
More than 2000	8	53.3
Cannot estimate	1	6.7

Table 27: Current Start Up Cost, Waaberi Market, Mogadishu (November 2012)

Mean Start Up Cost (US Dollars)	Respondents	%
Under 50	0	0.0
50-100	0	0.0
100-200	0	0.0
200-500	0	0.0
500-1000	0	0.0
1000-2000	4	26.7
More than 2000	11	73.3
Cannot estimate	0	0.0

The traders of Waaberi market had mostly received their start up funds from family or friends (60.0%, n=9). The rest gained their starting capital from personal savings. No respondent had turned to a bank or NGO for assistance. Additionally, no respondent had started without any start-up funds, a possible indicator that start up funds are essential for developing a business in this market place.

Table 28: Source of Money for Startup Costs, Waaberi Market, Mogadishu (November 2012)

Method	Respondents	%
Personal Savings	6	40.0
Family/Friend Loan	9	60.0
Bank Loan	0	0.0
Micro Finance - NGO	0	0.0
No Start Up Funds	0	0.0

Vocational training was not widely spread throughout the respondents. Of the respondents who answered the question, eight (53.3 %) said they had received vocational training. Of those, six (75.0%) said the training was useful, with the remaining two (25.0%) indicating the training had been indifferent or they did not know its effect.

The results from Waaberi support the results drawn in Wadajir regarding reasons for not satisfying demand. Most respondents (88.9%, n=9) stated the main reason was a lack of suppliers, and one (11.1%) indicated that sources could supply a large enough quantity of goods. This indicates a gap in the market of suppliers that could be filled by adequately trained and resourced young entrepreneurs.

Table 29: Main reason for not Satisfying Demand, Waaberi Market, Mogadishu (November 2012)

Main Reason	Respondents	%
Not enough sources/suppliers to buy more	8	88.9
Sources cannot supply quantities ordered	1	11.1
Lack of Money to Buy More	0	0.0
Cost of Transport	0	0.0
Lack of Workers	0	0.0
Low Quality of Products	0	0.0
Design and/or Style Inappropriate	0	0.0
Other	0	0.0
Don't Know	0	0.0
Refuse to Answer	0	0.0

All respondents (100.0%, n=15) were planning on expanding their business, with an average increase in employees of 3.9. On this basis, the outlook for future business expansion and employment is even better here than Wadajir. It is possible that programmes focusing on business expansion and employment will achieve a greater success here than in Wadajir.

Table 30: Businesses Planning to Expand and Mean Average of New Expected Employees, Waaberi Market, Mogadishu (November 2012)

Respondents	%	Average number of expected new employees per expanding business
15	100	3.9

Loans were taken out by most respondents (66.7%, n=11) during the course of their business operations, and again the main reason for doing so was to expand the business (87.5%, n=14). The effects of social links in Waaberi Market were underlined in this survey, as most respondents indicated they had taken out loans from family members (40.0%, n=4) or friends (30.0%, n=3). These links may be essential, as access to funding and loans was limited. Most respondents (93.3%, n=14) stated that a lack of lending organisations was a barrier to borrowing.

Table 31: Loans Incurred for the Business and from Whom, Waaberi Market, Mogadishu (November 2012)

		N	%
Ever taken a loan	Yes	10	66.7
Source of the loan	Other family member	4	40.0
	Friends	3	30.0
	Bank saving or loan	1	10.0
	Community organization	1	10.0
	Professional money lender	1	10.0

Table 32: Reason for taking a loan, Waaberi Market, Mogadishu (November 2012)

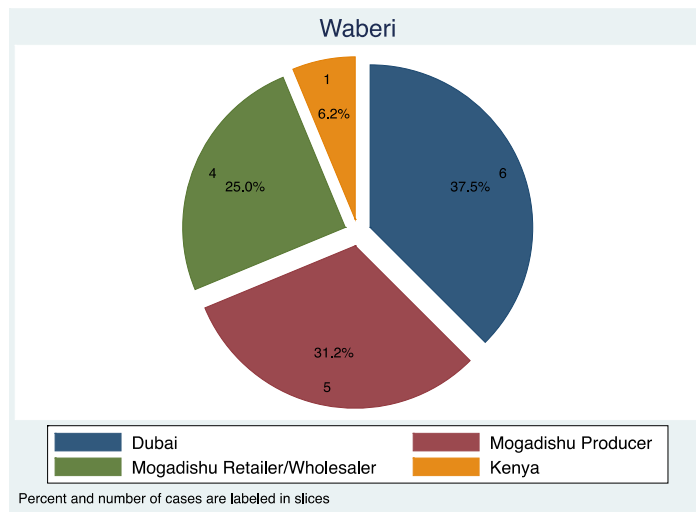
	N	%
Expand business	14	87.5
Hire more employees	0	0.0
Buy material goods/stock	1	6.3
Buy equipment	1	6.3
Go for training personally	0	0.0
Send employees for training	0	0.0
Other	0	0.0

Table 33: Obstacles to Financing, Waaberi Market, Mogadishu (November 2012)

	N	%
No Lending Organizations	14	93.3
Do not meet eligibility requirements for lending	1	6.67
Cannot afford interest payments	0	0.0
Do not know how to apply for financing	0	0.0
Do not have the required documents to apply for financing	0	0.0
Other	0	0.0

The goods in Waaberi market came from a greater variety of sources than Wadajir. The largest share of goods in one category that the respondents sold came from Dubai (37.5%, n=6). The majority of the rest (56.2%, n=5) came from Mogadishu producers or retailers, however, the size of the Dubai proportion may indicate a strong link with other, richer countries and goods.

Figure 11: Origin of Materials and Goods sold, Waaberi Market, Mogadishu (November 2012)



All respondents (100.0%, n=12) in Waaberi market were members of a business association.

4.3 Halwadag Market

The highest dissatisfaction rates for imported fruits, vegetables and grains in Halwadag is likely to be a result of satisfaction with, or low priced competition by, the locally produced products. There is not likely to be a gap in the market that young entrepreneurs can exploit here.

Flour has the second highest dissatisfaction rating (26.7%, n=8) in Halwadag market, with the main reason for dissatisfaction being 'too expensive'. It is possible that a lack of flour vendors in the market keeps the price artificially high, meaning the market place could support more flour vendors. This recommendation also applies to the remaining three categories with dissatisfaction over 10.0%: Locally Made Wood Products and Furniture (16.7%, n=5), Toiletries (13.3%, n=4) and Imported Clothes and Footwear (13.3%, n=4).

Table 34: Consumption and Satisfaction Rates of Goods, Halwadag Market, Mogadishu (November 2012)

Good	Non-Consumption		Satisfaction		Dissatisfaction	
		%		%		%
Powdered Milk, NIDO	8	26.7	16	53.3	6	20.0
UHT or Packet Milk	21	70.0	8	26.7	1	3.3
Milk (fresh)	4	13.3	24	80.0	2	6.7
Yogurt	11	36.7	18	60.0	1	3.3
Eggs	0	0.0	28	93.3	2	6.7
Poultry (live)	21	70.0	8	26.7	1	3.3
Poultry (slaughtered)	18	60.0	7	23.3	5	16.7
Meat (goat or cow)	8	26.7	18	60.0	4	13.3
Butter/Ghee	18	60.0	11	36.7	1	3.3
Animal Fats & Cooking Oils	21	72.4	7	24.1	1	3.45
Honey	13	43.3	15	50.0	2	6.7
Nuts/Loos	1	3.3	28	93.3	1	3.3
Fruit (local)	2	6.7	28	93.3	0	0.0
Fruit (imported)	10	33.3	10	33.3	10	33.3
Vegetables (local)	2	6.67	28	93.3	0	0.0
Vegetables (imported)	14	46.7	11	36.7	4	13.3
Juice (fresh)	2	6.7	28	93.3	0	0.0
Juice (packaged)	4	13.3	20	66.7	6	20.0
Grains (local)	6	20.0	23	76.7	1	3.3
Grains (imported)	23	76.7	5	16.7	2	6.7
Flour	2	6.7	20	66.7	8	26.7
Charcoal	10	33.3	16	53.3	0	0.0
Bread (fresh)	22	73.3	8	26.7	1	3.3
Baked Goods (cakes, buns)	11	36.7	17	56.7	2	6.7
Sweets (xalwo, candies)	2	6.7	28	93.3	0	0.0
Prepared/Processed Food Products	11	36.7	18	60.0	1	3.3
Shetaro (samboos, bur, bajiye)	7	23.3	22	73.3	1	3.3
Locally-Made Metal Goods & Furniture	15	50.0	12	40.0	3	10.0
Locally Made Tools (incl. Agric)	9	30.0	20	66.7	1	3.3
Locally Made Wood Products & Furniture	13	43.3	12	40.0	5	16.7
Locally-Made Straw Products	18	60.0	11	36.7	1	3.3
Spare Parts for Bikes, Cars, Bodas	20	66.7	7	23.3	3	10.0
Toiletries & Beauty Items	10	33.3	16	53.3	4	13.3
Locally Made Clothes & Footwear	20	66.7	9	30.0	1	3.3
Imported Clothes & Footwear	2	6.7	24	80.0	4	13.3
Second-hand Clothes & Footwear	9	30.0	19	63.3	2	6.7
Cloth & Sewing Items (inc. Laows)	24	80.0	6	20.0	0	0.0

Table 35: Most Commonly Consumed Goods, Halwadag Market, Mogadishu (November 2012)

Good	n=x	%
Eggs	30	100.0
Nuts	29	96.7
Imported Clothes and Footwear	28	93.3
Sweets	28	93.3
Flour	28	93.3
Veg local	28	93.3
Fruit Local	28	93.3

Table 36: Goods with Highest Associated Dissatisfaction, Percent of Consumers with Primary Reason for Dissatisfaction, Halwadag Market, Mogadishu (November 2012)

Good	Dissatisfied	Primary Reasons for Dissatisfaction
Fruit (imported)	33.3%	<i>Too Expensive</i>
Flour	26.0%	<i>Too Expensive</i>
Locally made Wood Products & Furniture	16.7%	<i>Too Expensive</i>
Toiletries & Beauty Items	13.3%	<i>Too Expensive</i>
Imported Clothes and Footwear	13.3%	<i>Too Expensive</i>

As seen in the other markets, Minibuses and Minivans are the most commonly used service around Halwadag Market, and again they have the highest dissatisfaction rates at 43.3% (n=13) and 51.7% (n=15) respectively. The most common reason for the Minibuses was lack of supply at 38.5%, (n=5) of respondents, followed by lack of punctuality, at 23.1% (n=3). Issues with customer service will be difficult to address with vocational training in the context of Mogadishu, but start up programmes and funding for Minivan drivers/owners may add additional capacity to the service.

Appliance Repair services, used by the majority of respondents (63.0%, n=19), suffer from a high rate of dissatisfaction (20.0%, n=6), with the most common reasons being ‘lack of supply’ and ‘too expensive’. Vocational training and business start up assistance may address both of these issues, as an increased availability of trained technicians will increase the supply of workers and lower the cost of hire.

Similar measures may also lower the dissatisfaction rating (16.7%, n=5) for Shetaro (Baked goods) as the primary reasons for dissatisfaction were the same (‘lack of availability’ and ‘too expensive’).

Almost all respondents (98.7%, n=29) used restaurants in Halwadag Market. For such a well used service, the dissatisfaction rating is high, at 20.0% (n=6). The most common reason for dissatisfaction was expense. As almost as many people use tea shops (86.7%, n=26) and the dissatisfaction rating is lower (10.0%, n=3) the high rating of dissatisfaction for restaurants is unlikely to be due to the cost of refreshments. The food being offered is likely to be the cause of the discontent. More research may be needed to find the cause, as it could be down to high prices of raw material or other factors. If additional restaurants will drive the price down, then the market might be able to support additional restaurant businesses.

The remaining service with a dissatisfaction rating over 10.0% is Computer Technician (at 13.3%, n=4). It is possible that vocational training, leading to an increase in technicians, may lower the rating as the main reason given was Too Expensive. However, the high rate of non-consumption (63.3%, n=19) may indicate a lack of need for this service, as well as a lack of take-up due to expense.

Table 37: Consumption and Satisfaction Rates of Services, Halwadag Market, Mogadishu (November 2012)

Service	Non-Consumption		Satisfaction		Dissatisfaction	
		%		%		%
Minibus (koostar)	2	6.7	15	50.0	13	43.3
Minivan (caasi)	2	6.9	12	41.4	15	51.7
Appliance Repair	11	37.0	13	43.3	6	20.0
Generator Repair Technician	26	86.7	4	13.3	0	0.0
Motorbike/Vehicle Mechanic	23	63.3	11	36.7	0	0.0
Photographer/Videographer	20	66.7	9	30.0	1	3.3
Electrician	17	56.7	10	33.3	3	10.0
Blacksmith or Welder	19	63.3	10	33.3	1	3.3
Computer Technician	19	63.3	7	23.3	4	13.3
Mason or Bricklayer	19	63.3	10	33.3	1	3.3
Plumber	7	23.3	20	66.7	3	10.0
Construction Worker	19	63.3	8	26.7	3	10.0
Shetaro or Baked Goods	13	43.3	12	40.0	5	16.7
Cut Fruit or Vegetables	7	23.3	22	73.3	1	3.3
Restaurant	1	3.3	23	76.7	6	20.0
Tea Shop	4	13.3	23	76.7	3	10.0
Caterer	20	66.7	10	33.3	0	0.0
Dobbi or Clothes Washer	9	30.0	18	60.0	3	10.0
Wood/Sand/Straw Collector	27	90.0	3	10.0	0	0.0
Dairy Farmer	23	76.7	5	16.7	2	6.7
Water Collector/Deliverer	22	73.3	6	20.0	2	6.7
Split Rocks/Gravel	24	80.0	5	16.7	1	1.33

Barber	7	23.3	20	66.7	3	10.0
Beautician	19	63.3	9	30.0	2	6.7
Tailor	1	3.3	29	96.7	0	0.0

Table 38: Most Commonly Consumed Services, Halwadeg Market, Mogadishu (November 2012)

Service	n=x	%
Restaurant	29	96.7
Tailor	29	96.7
Minibus (koostar)	28	93.3
Minivan (caasi)	28	93.3
Tea Shop	26	86.7
Plumber	23	76.7
Cut Fruit or Vegetables	23	76.7
Barber	23	76.7

Table 39: Services with Highest Associated Dissatisfaction, Percent of Customer with Primary Reasons for Dissatisfaction, Halwadag Market, Mogadishu (November 2012)

Service	Dissatisfied	Primary Reason for Dissatisfaction
Minivan (caasi)	51.7%	<i>Lack of Supply</i>
Minibus (koostar)	43.3%	<i>Lack of Punctuality</i>
Appliance Repair	20.0%	<i>Lack of Supply, Too Expensive</i>
Restaurant	20.0%	<i>Too Expensive</i>
Shetaro or Baked Goods	16.7%	<i>Lack of Supply, Too Expensive</i>
Computer Technician	13.3%	<i>Too Expensive</i>

Few of the respondents in Halwadag market answered the question of who they sell their finished products too. Of those that did, most (60.0%, n=3) indicated they sold directly to the customer (see table 41 below). Despite the small sample, this would support the conclusion that the market does not engage in wholesale trade, as exemplified by the other three market surveys. All the respondents (100.0%, n=15) indicated that they were satisfied with the traders they worked alongside, and that they all felt competitive (see table 43).

Table 40: Who Traders Sell Finished Products / Services Too, Halwadag Market, Mogadishu (November 2012)

Category	N	%
Directly to Customer	3	60.0
Traders	1	20.0
Other	1	20.0

Table 41: Market Trader Satisfaction With Traders, Halwadag Market, Mogadishu (November 2012)

Non-Consumption	%	Satisfaction	%	Dissatisfaction	%
0	0.0	15	100.0	0	0.0

The amount needed to start up a business has not changed over time at Halwadag market, with the original start up costs and the newer estimate remaining broadly similar (see table 43 below). Given that the other markets indicated an increase, this may require further investigation. It is possible that the traders interviewed had all set up business recently, or that the market itself was a recent construction. Unfortunately collecting start dates was not part of the survey's mandate. As five of the respondents (33.3%) were unable to provide a figure, it may also be possible they felt uncomfortable with giving an answer. Regardless, the cost of setting up a business was high for all of the respondents who were able to state a figure, with one (6.7%) saying it cost more than USD1000, and the remainder (60.0%, n=9) stating it cost them more than USD2000 to set up their current business.

Table 42: Competitiveness, and Reason for Non-Competitiveness, Halwadag Market, Mogadishu (November 2012)

Yes	n	%
15	100.0	

Table 43: Original Start Up Cost, Halwadag Market, Mogadishu (November 2012)

Mean Start Up Cost (US Dollars)	Respondents	%
Under 50	0	0.0
50-100	0	0.0
100-200	0	0.0
200-500	0	0.0
500-1000	0	0.0
1000-2000	1	6.7
More than 2000	9	60.0
Cannot estimate	5	33.3

Table 44: Current Start Up Cost, Halwadag Market, Mogadishu (November 2012)

Mean Start Up Cost (US Dollars)	Respondents	%
Under 50	0	0.0
50-100	0	0.0
100-200	0	0.0
200-500	0	0.0
500-1000	0	0.0
1000-2000	1	6.7

More than 2000	8	53.3
Cannot estimate	6	40.0

The respondent traders of Halwadag were more independent than in other locations when it came to taking out loans. The vast majority (81.3%, n=13) used their personal savings with only three (18.7%) stating they had used another source of loan when starting up their business. The use that the respondents would put a loan too were limited to only four choices (see table 47), with the two most common being to expand the business (66.6%, n=14) and to hire more employees (19.1%, n=4). This is indicative of a desire among the respondents to expand their business, so the environment for support by agencies may be supportive. Especially as, again, the majority of respondents (82.4%, n=14) indicated that lack of lending agencies is a barrier to finance.

Table 45: Source of Money for Startup Costs, Halwadag Market, Mogadishu (November 2012)

Method	Respondents	%
Personal Savings	13	81.3
Family/Friend Loan	1	6.3
Bank Loan	1	6.3
Micro Finance - NGO	0	0.0
No Start Up Funds	1	6.3

Table 46: Reason for taking a loan, Halwadag Market, Mogadishu (November 2012)

	N	%
Expand business	14	66.7
Hire more employees	4	19.1
Buy material goods/stock	2	9.5
Buy equipment	1	4.7
Go for training personally	0	0.0
Send employees for training	0	0.0
Other	0	0.0

Table 47: Obstacles to Financing, Halwadag Market, Mogadishu (November 2012)

	N	%
No Lending Organizations	14	82.4
Do not meet eligibility requirements for lending	1	5.9
Cannot afford interest payments	0	0.0
Do not know how to apply for financing	0	0.0
Do not have the required documents to apply for financing	0	0.0
Other	2	11.8

Of the 15 respondents in Halwadag market, only six (40.0%) had received vocational training. Of those, five (83.3%) had found the training useful in their current business, with one (16.7%) saying the training had been too short.

The respondents indicated the main reasons for being unable to satisfy demand were not having enough suppliers (35.7%, n=5) and the existing sources not being able to supply the quantities ordered (57.1%, n=8). As in the case of the other markets, this indicates a supply side problem.

Developing the local capacity to provide goods through increasing the number of businesses means that those businesses may run into a similar bottleneck. Indeed, an increased number of businesses may reduce the supply to all, unless the capacity of wholesalers to supply goods to the traders is increased.

Table 48: Main reason for not Satisfying Demand, Halwadeg Market, Mogadishu (November 2012)

Main Reason	Respondents	%
Not enough sources/suppliers to buy more	5	35.7
Sources cannot supply quantities ordered	8	57.1
Lack of Money to Buy More	1	7.14
Cost of Transport	0	0.0
Lack of Workers	0	0.0
Low Quality of Products	0	0.0
Design and/or Style Inappropriate	0	0.0
Other	0	0.0
Don't Know	0	0.0
Refuse to Answer	0	0.0

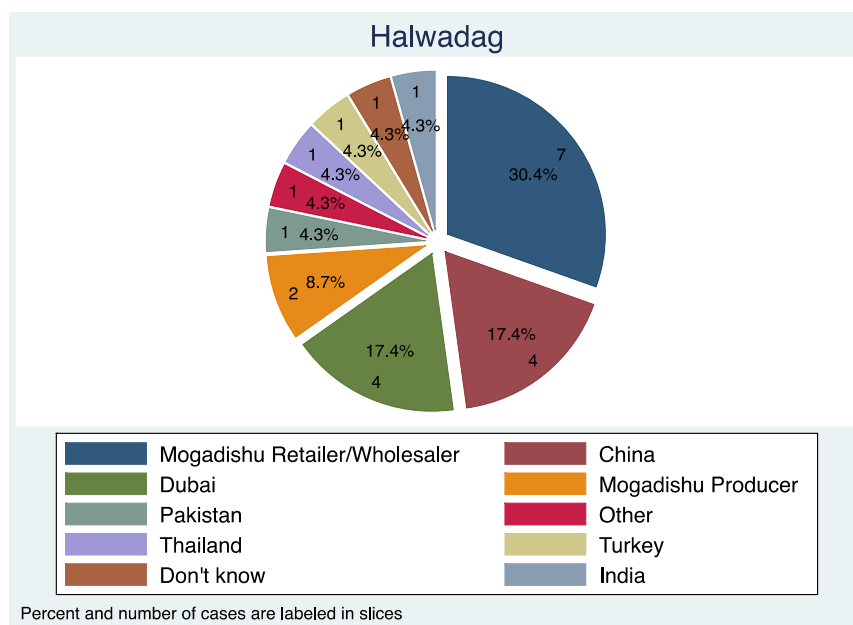
All of the business respondents (100.0%, n=15) stated that they plan to expand their businesses, with an average increase in the number of employees of 4.5. This indicates a potentially increasing capacity of the market in Halwadag to absorb new employees at a high rate.

Table 49: Businesses Planning to Expand and Mean Average of New Expected Employee, Halwadag Market, Mogadishu (November 2012)

Respondents	%	Average number of expected new employees per expanding business
15	100.0	4.5

The retailers in Halwadag showed a greater range of contacts than Wadajir and Waabari in the source of their goods. The largest stake (30.4%, n=7) was held by goods bought from Mogadishu based wholesalers/retailers. However, China (17.4%, n=4) and Dubai (17.4%, n=4) were the next largest sources. Turkey, India, Pakistan and Thailand also featured with one respondent (4.3%) each.

Figure 12: Origin of Goods and Services, Halwadag Market, Mogadishu (November 2012)



100% of respondents (n=2) were members of a Business Group in Halwadag Market.

4.4 Whardigle Market

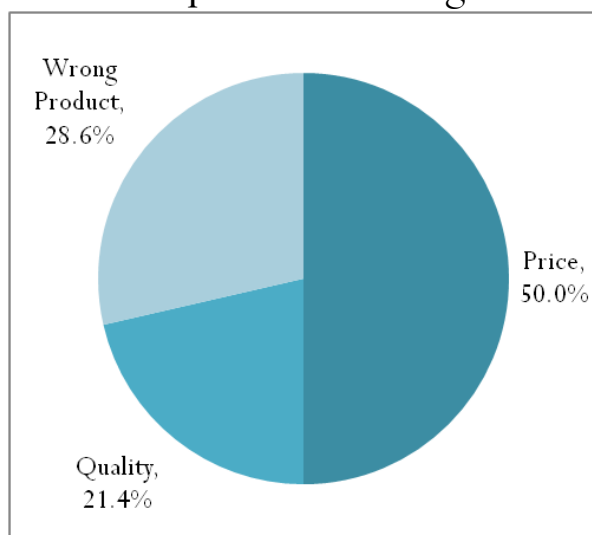
While respondents from Whardigle market indicated a high level of dissatisfaction with UHT/packet milk (34.4%, n=11), this is most likely due to the high levels of satisfaction with fresh milk (93.8%, n=30). Similarly, high satisfaction rates for local fruit (96.8%, n=30) and fresh juice (87.5%, n=28) likely correspond with high levels of dissatisfaction with imported fruit (32.3%, n=10) and packaged juice (31.2%, n=10).

Given the high levels of satisfaction with local milk, yoghurt is an item that could be improved and expanded within the market. Non-consumption of yoghurt is high (68.6%, n=22) as is dissatisfaction (21.8%, n=7); this may be in part to low levels of knowledge about the production of yoghurt or that the yoghurt available in the market is imported and not produced locally.

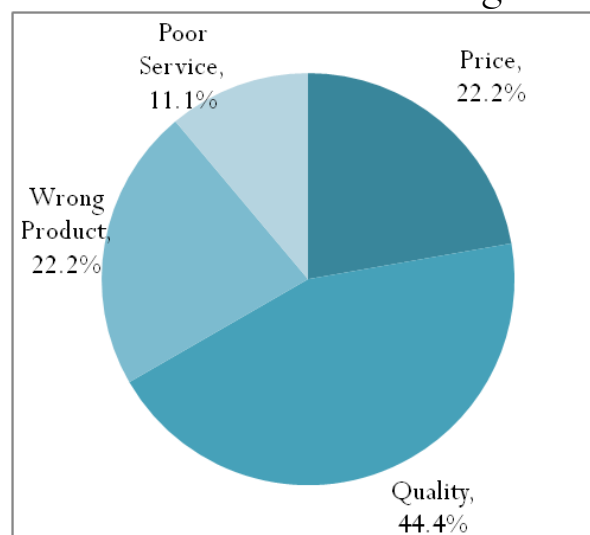
Table 50: Consumption and Satisfaction Rates of Goods, Whardigle Market, Mogadishu (November 2012)

Good	Non-Consumption		Satisfaction		Dissatisfaction	
		%		%		%
Powdered Milk, NIDO	4	12.5	16	50.0	12	37.5
UHT or Packet Milk	8	25.0	13	40.6	11	34.4
Milk (fresh)	1	3.1	30	93.8	1	3.1
Yogurt	22	68.8	3	9.4	7	21.8
Eggs	6	18.8	25	78.1	1	3.1
Poultry (live)	15	46.9	13	40.6	4	12.5
Poultry (slaughtered)	9	28.1	19	59.4	4	12.5
Meat (goat or cow)	1	3.1	26	81.3	5	15.6
Butter/Ghee	14	43.8	14	43.8	4	12.4
Animal Fats & Cooking Oils	7	21.9	20	62.5	5	15.6
Honey	11	34.4	19	59.4	2	6.2
Charcoal	5	15.7	26	81.3	1	3.1
Nuts/Loos	15	46.9	15	46.9	2	6.2
Fruit (local)	1	3.2	30	96.8	0	0.0
Fruit (imported)	5	15.6	17	52.1	10	32.3
Vegetables (local)	0	0.0	32	100.0	0	0.0
Vegetables (imported)	6	18.8	21	65.6	5	15.6
Juice (fresh)	4	12.5	28	87.5	0	0.0
Juice (packaged)	4	12.5	18	56.3	10	31.2
Grains (local)	4	12.5	28	87.5	0	0.0
Grains (imported)	8	25.0	18	56.3	6	0.0
Flour	0	0.0	31	96.9	1	3.1
Charcoal	5	15.6	26	81.3	1	3.1
Bread (fresh)	13	40.6	16	50.0	3	9.4
Baked Goods (cakes, buns)	3	9.4	22	69.8	7	20.8
Sweets (xalwo, candies)	1	3.1	30	93.8	1	3.1
Prepared/Processed Food Products	3	9.4	28	87.5	1	3.1
Shetaro (sambuus, bur, bajiye)	4	12.5	28	87.5	0	0.0
Locally-Made Metal Goods & Furniture	2	6.3	28	87.5	2	6.3
Locally Made Tools (incl. Agric)	11	34.4	20	62.5	1	3.1
Locally Made Wood Products & Furniture	4	12.5	27	84.4	1	3.1
Locally-Made Straw Products	12	37.5	15	46.9	5	15.6
Spare Parts for Bikes, Cars, Bodas	18	56.3	10	31.3	4	12.4
Toiletries & Beauty Items	5	15.6	21	65.6	6	18.8
Locally Made Clothes & Footwear	10	31.3	20	62.5	2	6.3
Imported Clothes & Footwear	2	6.3	16	50.0	14	43.7
Second-hand Clothes & Footwear	8	25.0	20	62.5	4	12.5
Cloth & Sewing Items (inc. Laows)	11	34.4	19	59.4	2	6.3

Imported Clothing



Second Hand Clothing



As indicated above in Table 3, dissatisfaction with imported (43.7%, n=14) and second-hand (12.5%, n=4) clothes and footwear is much higher than with locally made clothes (6.3%, n=2). When comparing reasons for dissatisfaction for imported and second-hand clothing, price (50.0%, n=13) was frequently reported for imported clothing compared to quality (44.4%, n=4) for second-hand clothing.

Table 51: Most Commonly Consumed Goods, Whardigle Market, Mogadishu (November 2012)

Good	n=x	%
Flour	32	100.0
Vegetables (local)	32	100.0
Fruit (local)	31	96.9
Meat (Goat and Cow)	31	96.9
Milk (fresh)	31	96.9
Sweets	31	96.9

Table 52: Goods with Highest Associated Dissatisfaction, Percent of Consumers with Primary Reasons for Dissatisfaction, Whardigle Market, Mogadishu (November 2012)

Good	Dissatisfied	Primary Reasons for Dissatisfaction
Powdered Milk, Nido	37.5%	Too Expensive
UHT or Packet Milk	34.4%	Too Expensive
Fruit (imported)	32.3%	Too expensive
Juice (packaged)	31.2%	Too Expensive
Yogurt	21.8%	Too Expensive, Product Not Good Match With Needs
Baked Goods	20.8%	Too Expensive
Meat (Goat or Cow)	15.6%	Too Expensive
Animal Fats & Cooking Oils	15.6%	Too Expensive, Poor Quality

Vegetables (imported)	15.6%	<i>Too Expensive</i>
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The Minibus and Minivan top the dissatisfaction rating in Whardigle too. The Minibus is used by most (87.6%, n=28) respondents and the Minivan by all. The leading reason for the dissatisfaction of the minibus service was Lack of Supply. As mentioned above, this gap in the market could be filled by assisting potential drivers and owners with start up programmes and assistance, and possibly driving training. The poor customer service of the minivan drivers will be harder to address.

The service of Photographer/Videographer has a low non-consumption rate (16.7%, n=6) in this market. The dissatisfaction rate, however, is high (25.0%, n=8). In this case, vocational training focusing on customer service is likely to have an impact. In the case of the minivans and minibuses, where the customers are forced to use the service anyway, customer service training is not likely to be a main concern of the drivers and conductors. If given to young business owners and employees this type of training is likely to be useful in Photography because it is a service that clients use by choice, and may increase the income of the business.

Restaurants received the same dissatisfaction rating, however their satisfaction rating was higher, at 62.5% (n=20). The reason given most for dissatisfaction was poor customer service. As in the case of Photographer/Videographer, additional training in customer service skills may improve the income of the restaurants.

The cleaning service (Dobbi) had the next highest level of dissatisfaction (21.9%, n=7). The main complaint was over the quality of the service. Training could be given to improve the techniques used in the washing. Extra funding may also assist with improving equipment and facilities, leading to a better service.

Table 53: Consumption and Satisfaction Rates of Services, Whardigle Market, Mogadishu (November 2012)

Service	Non-Consumption		Satisfaction		Dissatisfaction	
		%		%		%
Minibus (koostar)	4	12.5	8	25.0	20	62.5
Minivan (caasi)	0	0.0	13	40.6	19	69.4
Appliance Repair	8	25.0	22	68.8	2	6.3
Generator Repair Technician	9	28.1	21	65.6	2	6.3
Motorbike/Vehicle Mechanic	13	40.6	17	53.1	2	6.3
Photographer/Videographer	6	16.7	18	56.0	8	25.0
Electrician	6	18.8	24	75.0	2	6.3
Blacksmith or Welder	7	21.9	23	71.9	2	6.3
Computer Technician	7	21.9	24	75.0	1	3.1
Mason or Bricklayer	6	18.8	21	65.6	5	15.6
Plumber	9	28.1	22	68.8	1	3.1
Construction Worker	4	12.5	25	78.1	3	9.4

Shetaro or Baked Goods	0	0.0	30	93.8	6.3	0.0
Cut Fruit or Vegetables	3	9.9	28	87.5	1	3.1
Restaurant	4	12.5	20	62.5	8	25.0
Tea Shop	5	15.6	24	75.0	3	9.4
Caterer	13	40.6	15	46.9	4	12.5
Dobbi or Clothes Washer	8	25.0	17	53.1	7	21.9
Wood/Sand/Straw Collector	14	43.8	18	56.3	0	0.0
Dairy Farmer	11	34.5	17	53.1	4	12.5
Water Collector/Deliverer	9	28.1	23	71.9	0	0.0
Split Rocks/Gravel	13	40.6	18	56.3	1	3.1
Barber	8	25.0	23	71.9	1	3.1
Beautician	8	25.0	20	62.5	4	12.5
Tailor	2	6.25	29	90.6	1	3.12

Table 54: Most Commonly Consumed Services, Whardigle Market, Mogadishu (November 2012)

Service	n=x	%
Minivan (caasi)	32	100.0
Shetaro or Baked Goods	32	100.0
Tailor	30	93.75
Cut Fruit or Vegetables	29	90.63
Minibus (koostar)	28	87.5
Construction Worker	28	87.5
Restaurant	28	87.5

Table 55: Services with Highest Associated Dissatisfaction, percent of Consumers with Primary Reasons for Dissatisfaction, Whardigle Market, Mogadishu (November 2012)

Service	Dissatisfied	Primary Reason for Dissatisfaction
Minivan (caasi)	69.4%	Poor Customer Service
Minibus (koostar)	62.5%	Lack of Supply
Photographer/Videographer	25.0%	Poor Customer Service
Restaurant	25.0%	Poor Customer Service
Dobbi or Clothes Washer	21.9%	Poor Quality
Mason or Bricklayer	15.6%	Lack of Supply, Poor Quality
Caterer	12.5%	Lack of Supply, Too Expensive
Dairy Farmer	12.5%	Too Expensive
Beautician	12.5%	Lack of Supply, Too Expensive

As in the other markets, most respondent market traders (92.9%, n=13) in Whardigle also stated they mainly sold their goods to the customer. Their relationships with the other traders in the

market were generally cordial, with 71.43% (n=10) stating they were satisfied with the other traders. Not all of the traders felt they were competitive. Most (86.7%, n=13) did, but two traders stated they were less competitive because of the quality or quantity of their goods (see table 59).

Table 56: Who Traders Sell Finished Products / Services Too, Whardigle Market, Mogadishu (November 2012)

Category	N	%
Directly to Customer	13	92.9
Other	1	7.14

Table 57: Market Trader Satisfaction With Traders, Whardigle Market, Mogadishu (November 2012)

Non-Consumption	%	Satisfaction	%	Dissatisfaction	%
2	14.29	10	71.43	2	14.29

Table 58: Competitiveness, and Reason for Non-Competitiveness, Whardigle Market, Mogadishu (November 2012)

Yes	%	If not, main reason
13	86.7	Less quantity (n=1), less quality (n=1)

As in Wadajir and Waaberi, the respondent estimated cost of start up has increased from the original amounts the traders needed to begin their current businesses. Most of the respondents (60.0%, n=9) were able to set up with less than USD500. The respondents estimate that the current *minimum* for start up is now USD500, with 40.0% (n=6) estimating it would require USD1000-2000 of capital.

Table 59: Original Start Up Cost, Whardigle Market, Mogadishu (November 2012)

Start Up Cost (US Dollars)	Respondents	%
Under 50	0	0.0
50-100	0	0.0
100-200	6	40.0
200-500	3	20.0
500-1000	2	13.3
1000-2000	0	0.0
More than 2000	3	20.0
Cannot estimate	1	6.7

Table 60: Current Start Up Cost, Whardigle Market, Mogadishu (November 2012)

Mean Start Up Cost (US Dollars)	Respondents	%
Under 50	0	0.0
50-100	0	0.0
100-200	0	0.0
200-500	0	0.0
500-1000	5	33.3
1000-2000	6	40.0
More than 2000	1	6.7
Cannot estimate	3	20.0

The source of the start up costs further underlined the self reliance shown by respondents in the other markets, and also, to some extent, the additional role that social contacts play in start up funding. Most of the respondents (59.1%, n=13) stated that they used personal savings for their start up costs. Additionally, family and friends contributed some start up capital (27.3%, n=6). Bank loans and micro finance supplied by NGOs were a source of funding for a further three respondents (13.7%). Post start up loans were taken up by 60.0% (n=9) of the market respondents, with most of those (55.5%, n=5) getting loans from family members, three (33.3%) from friends and one (11.1%) from a community/religious leader.

Table 61: Source of Money for Startup Costs, Whardigle Market, Mogadishu (November 2012)

Method	Respondents	%
Personal Savings	13	59.1
Family/Friend Loan	6	27.3
Bank Loan	2	9.1
Micro Finance - NGO	1	4.6
No Start Up Funds	0	0.0

Table 62: Loans Incurred for the Business and from Whom, Whardigle Market, Mogadishu (November 2012)

		N	%
Ever taken a loan	Yes	9	60.0
Source of the loan	Husband/Wife	0	0.0
	Parent	0	0.0
	Brother/Sister	2	22.2
	Other family member	3	33.3
	Friends	3	33.3
	Community or religious leader	1	11.1
	Bank saving or loan	0	0.0
	NGO	0	0.0
	Microfinance organization	0	0.0
	Boss or employer	0	0.0
	Community organization	0	0.0
	Professional money lender	0	0.0
	Other	0	0.0

The reason for taking up these loans varied in the case of Whardigle. The most common reasons given were for expanding the business (31.8%, n=14), and buying equipment (22.7%, n=10). Hiring more employees also featured prominently, with 18.2% of respondents (n=8) giving this as a reason. Four of the respondents (9.1%) also indicated they took a loan to take up training themselves. The range of responses to this question indicates a possibility that a range of projects could be run in this market, and may be well received. The range of problems presented in the obstacles to financing indicate the same conclusion. The most common response (38.7%, n=12) was a lack knowledge of how to access financing. The next most common response was the lack of lending organisations (32.3%, n=10). Not having the required documents was another prominent answer (16.6%, n=5). Any lending or training programmes may need to take into account a lack of documentation on the part of the participants, and make sure it is not a barrier to participation.

Table 63: Reason for taking a loan, Whardigle Market, Mogadishu (November 2012)

	N	%
Expand business	14	31.8
Hire more employees	8	18.2
Buy material goods/stock	5	11.0
Buy equipment	10	22.7
Go for training personally	4	9.1
Send employees for training	3	6.8
Other	0	0.0

Table 64: Obstacles to Financing, Whardigle Market, Mogadishu (November 2012)

	N	%
No Lending Organizations	10	32.3
Do not meet eligibility requirements for lending	3	9.7
Cannot afford interest payments	1	3.2
Do not know how to apply for financing	12	38.7
Do not have the required documents to apply for financing	5	16.1
Other	0	0.0

In Whardigle market, nine (60.0%) of the fifteen respondents had received vocational training. Of those, six (60.0%) found the training useful in their current business, two (22.2%) said the training was not related at all to their current profession, and one (11.1%) had not completed the training.

Unfortunately the response to the question on reasons for not satisfying demand in the market was low, with only six respondents answering. The results were evenly spread across Not enough suppliers, sources unable to supply quantities ordered, and lack of money to buy more (33.3%, n=2 each). The first two options reflect the issues faced in the other markets, with the last underlining the problem of adequate finance in these respondents in Whardigle market.

Table 65: Main reason for not Satisfying Demand, Whardigle Market, Mogadishu (November 2012)

Main Reason	Respondents	%
Not enough sources/suppliers to buy more	2	33.3
Sources cannot supply quantities ordered	2	33.3
Lack of Money to Buy More	2	33.3
Cost of Transport	0	0.0
Lack of Workers	0	0.0
Low Quality of Products	0	0.0
Design and/or Style Inappropriate	0	0.0
Other	0	0.0
Don't Know	0	0.0
Refuse to Answer	0	0.0

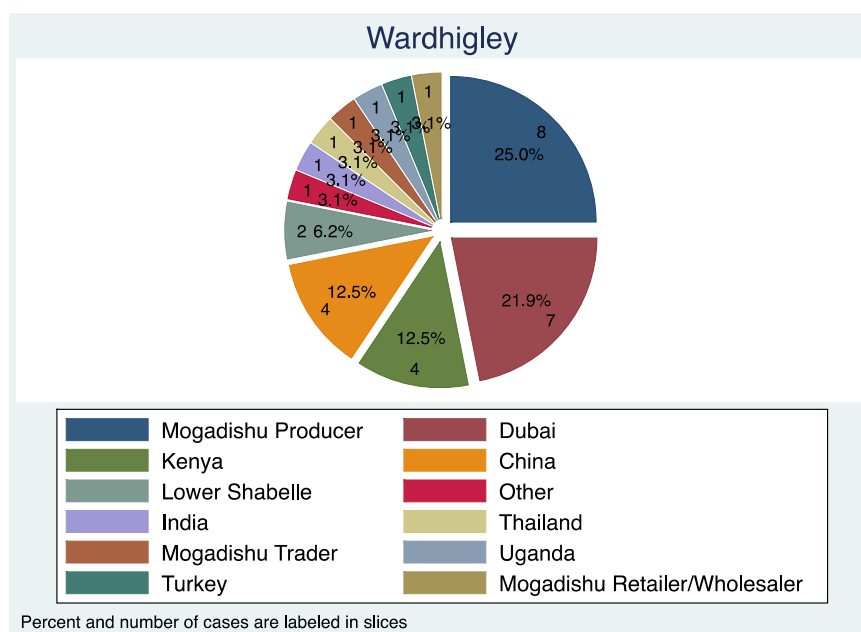
All of the businesses (100.0%, n=15) indicated they intended to expand, with an estimated average increase in employees of 2.1. Based on this estimate, Whardigle may not be the most receptive market for programmes targeting employment only. Finally, Whardigle market has the largest range of international suppliers of the four markets. The respondents listed twelve different sources

(see figure 14). A quarter of the respondents (n=6) listed Mogadishu based producers as their main source of goods and services, with Dubai accounting for 21.9% (n=7) of the respondents. The next largest source was Kenya (12.5%, n=4). The range of sources is likely to mean that the range of products is good.

Table 66: Businesses Planning to Expand and Mean Average of New Expected Employees, Whardigle Market, Mogadishu (November 2012)

Respondents	%	Average number of expected new employees per expanding business
15	100.0	2.1

Figure 13: Origin of Goods and Services Sold, Wardhigle Market, Mogadishu (November 2012)



5 Skills and Training

When comparing the training backgrounds of consumer demand respondents in the markets surveyed in Mogadishu, respondents from markets with higher incomes have received more training than those individuals in markets with lower incomes. In particular, 86.7% (n=4) of respondents from Halwadag and 84.4% (n=5) of Whardigle respondents indicated receiving literacy training, compared to only 6.7% (n=2) of those interviewed in Wadajir and 20.0% (n=6) from Waaberi. Business skills training was frequently reported by respondents across all markets surveyed, with nearly 70.0% of individuals from Wadajir (66.7%, n=20) Whardigle (68.8%, n=22) having received this type of training. Conversely, less than a third of respondents in the four markets received training in numeracy, with the highest number of responses in Whardigle (21.9%, n=15). Incorporating numeracy training would be opportune given the low levels of reported training in this skill set and the necessity of these skills in many income-generating activities.

Figure 14: Training Background of Consumer Demand Respondents, All Markets, Mogadishu (November 2012)

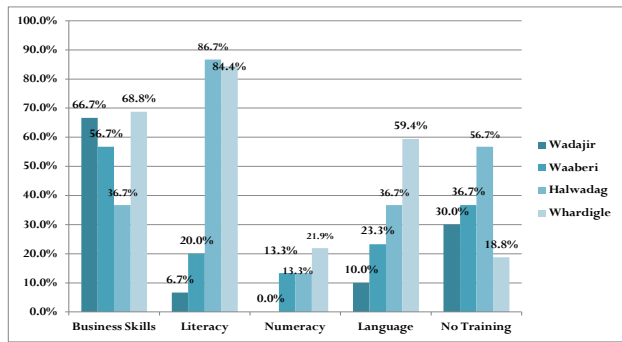
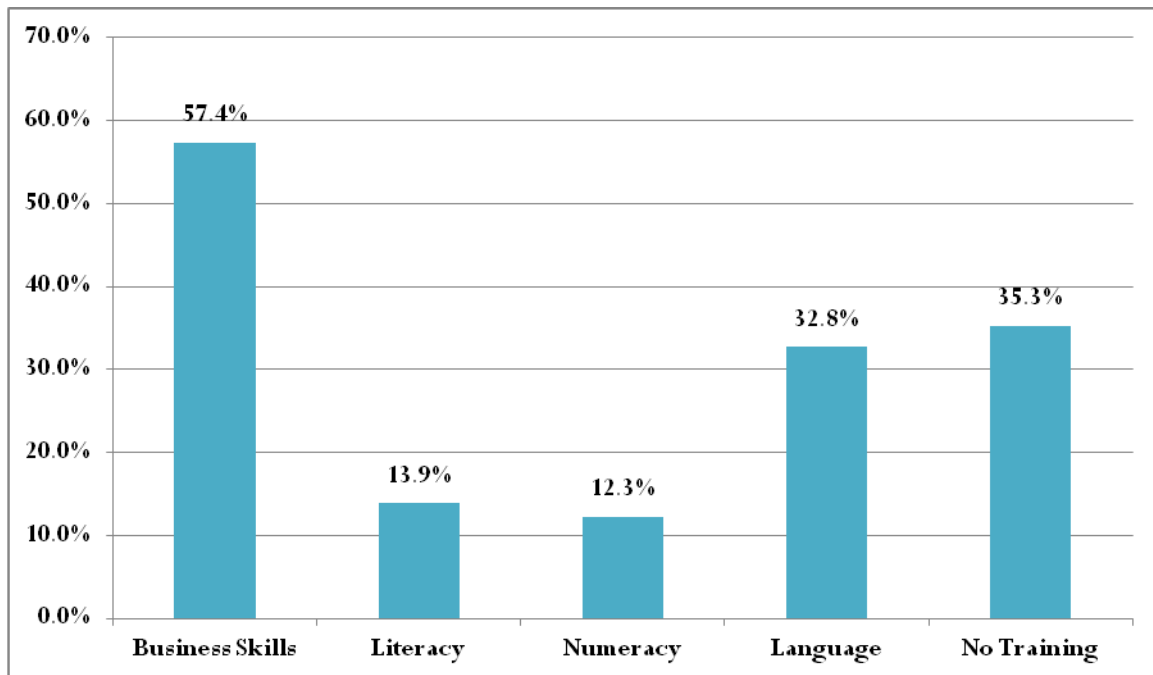


Figure 15: Training Background of Consumer Demand Respondents, All Markets, Mogadishu (November 2012)



Again, when comparing the training backgrounds of consumer demand respondents in the four markets surveyed in Mogadishu, literacy and numeracy training were the least frequently reported skills (Literacy: 13.9%; Numeracy: 12.3%). A third of respondents indicated receiving language training (32.8%) and most (57.4%) individuals surveyed reported receiving training in business skills.

The DRC report identified a high unmet demand for hotel and restaurant services and found the following skills and occupations required for this sector:

- Bakery, pastry and confectionary making
- Waiting
- House cleaning
- Store keepers
- Professional cooks
- Cashiers

6 Conclusions and Recommendations

General

The market trader respondents in all four markets indicated that they faced problems with getting enough goods to satisfy customer demand. Young entrepreneurs may find that there is a gap in the market for supplying goods wholesale, if they receive the right entrepreneurial training and support.

Traders across all the markets indicated that access to finance is an issue, with a lack of lending organisations featuring strongly as a barrier. If possible, youth employment programmes should target this issue, or at the very least incorporate it into their planning. Additionally, start-up costs have risen dramatically across nearly all the markets. Finding self employment for young people, even for individuals who have received training, may be a difficult task because of such high and rising costs. Most individuals relied strongly on personal savings or help from friends and family to find the starting capital. Should the rising cost of start up surpass the capability of individuals to cover, they will require access to other sources of finance. Such programmes may have to take account for the fact that some individuals may not have access to documentation, as in the case of some traders in Whardigle market. There was some indication that micro-financing from NGOs is available in some areas. It may be possible to form partnerships with these organisations.

For the traders, buying and receiving their goods proved to be a consistent problem. A lack of suppliers and the suppliers' lack of ability to provide sufficient quantities of goods were a constant source of complaint. This will need to be remembered when creating any programmes, as additional businesses in a market may place additional strain on these poor supply links. More research should be conducted in order to understand this issue, and to understand how it can be overcome. It must be noted that the majority of the traders interviewed sold directly to the customer. Very few traded with other traders. As such, the supply side of the business cycle of the markets is largely missing from this survey.

In general, however, the traders were hopeful, with almost all indicating they planned to expand in the future.

Two particular types of service drew high dissatisfaction ratings across all the markets. The Minivan and Minibus services were commonly attributed with poor customer service, poor punctuality and other problems. Researcher observation indicated that many of these issues may be solved by

increasing availability of these services, thereby reducing a crowded and stressed service that almost all customers have to use.

Wadajir

Due to a high level of satisfaction overall with products in Wadajir Market, involvement in the food or clothing industry is not recommended. Highest levels of dissatisfaction were found among products where there was a local alternative which received substantially higher satisfaction.

The minibus and minivans transportation systems receive high levels of dissatisfaction at 66.6% (n=20) and 63.3% (n=19) respectively, with people complaining that minibuses were not punctual (43.3%, n=13) and that both the minibuses and minivans are very crowded. These problems could be fixed by investment in more minibuses and minivans, as well as training provided for drivers in order to improve customer satisfaction. Driving training, customer service skills and financial support may have a measure of success in this field.

The high levels of dissatisfaction with the trades of plumber and electrician suggest that those individuals receive extra vocational training and/or help with acquiring tools.

In general, businessmen and entrepreneurs face obstacles in the Wadajir market as the price to start up a business has risen dramatically and there is a lack of loan opportunities in the area in which to start or expand businesses. It is recommended that lending programs be put into place in order to provide shop owners with the capital necessary to start or expand their businesses. In addition, a lack of supplies and suppliers has left a gap in wholesale businesses or transport companies, which if filled would provide employment, improve services of businesses in the area and benefit locals by providing them with a variety of goods to choose from.

Waaberi Market

Unlike Wadajir market, there are several potential opportunities in the food and clothing industry in Waaberi. With nearly a quarter of those surveyed who purchased eggs responding as being dissatisfied, it appears that there may be a possible gap in the market. Vendors selling butter and honey also receive high dissatisfaction rates, and their products are expensive. These commodities may be able to bear more competition. More research should be done regarding the wholesale price of slaughtered poultry in order to determine whether a gap exists in this market, as the reason for dissatisfaction with this product remains unclear.

There exists a gap in the Waaberi Market regarding tailors as they are very commonly used (93.3%, n=28), but over half of the respondents expressed dissatisfaction with the quality of the service (53.3%, n=15). With investment in professional training and proper equipment, this service would likely improve. Restaurants are subject to a high amount of complaints about their cleanliness and service. Training youths in hygiene and customer service may have the benefit of reducing health risks, as well as increasing employable skills.

Further research into the reason for dissatisfaction with dobbi services (50.0%, n=15) in the area is recommended as to determine how best to improve customer satisfaction and whether a gap exists.

Halwadag

Respondents complained that flour (26.7%, n=8), locally made wood products and furniture (16.7%, n=5), toiletries (13.3%, n=4), and imported clothes and footwear (13.3%, n=4) were “too expensive.” Providing capital and loans to prospective business owners in these services would

increase in the number of vendors of these four services, simultaneously providing employment and decreasing artificially high prices.

Minibuses and minivans, as in other markets, have been met with high levels of dissatisfaction (43.3% n=13 and 51.7% n=15 respectively). Driver training and an increase in the number of vehicles is recommended

Appliance repair services suffer from high levels of dissatisfaction (20.0%, n=6) and will benefit from vocational training and the supplying of proper equipment to lower prices and improve customer satisfaction.

Despite the high consumption rate, Restaurants were often considered too expensive. Investigating the reason for the high price may provide extra opportunities for employment.

Specifically for Halwadag, the Appliance Repair service suffered from a lack of supply, and from being too expensive. There is a clear possibility here that vocational training and additional technicians could fill a need here.

The market traders in Halwadag all had desires or plans to expand. They also gave the highest mean estimate of an increase in employees for the business. This may indicate a huge potential or need for trained young people. Any programmes with the aim of increasing employment may find Halwadag market offers the best chance of success.

Whardigle

As is the case with the aforementioned markets, the minibus and minivan transportation systems were met with high levels of dissatisfaction (62.5%, n=20 and 69.4%, n=19 respectively). Lack of supply was the major complaint among customers of the minibuses, and investment in more vehicles and driver training is recommended to increase the quality of the service and provide more employment by hiring more drivers.

Photographers/Videographers have been met with high levels of dissatisfaction (25.0%, n=8). Investments in proper equipment and the providing of vocational training are likely pay dividends as they are likely to increase the currently low consumption rate of 16.7% (n=6).

The low estimate for the expected increase in employee numbers by traders in this market indicates a possible problem with employment drives. More investigation will be needed in this regard. Programmes that include financial or other types of support may be necessary, as employers themselves may need assistance with keeping their new employees. Partially funded apprenticeship programmes may be a good match to these needs. Additionally, employment may be created through self-employment.

Bearing these conclusions in mind, as well as the fact that many of these findings are indicative rather than concrete, the following recommendations are advisable.

- There is a strong need to extend research into the supply side of the business cycle in order to understand the reasons for poor supply links. As a lack of goods to satisfy consumer demands was a common complaint among traders, it is necessary to address this issue before promoting the expansion or creation of new businesses.

- High start-up costs and low provision of lending organisations were recorded in all market areas. It would therefore be advisable to explore options that would enable greater availability of and access to credit. Partnerships should be sought between microfinance and lending organisations to achieve the aims of greater youth employment.
- Further research is needed to confirm and understand potential gaps within each market i.e. food and clothing in Waaberi; wholesale retailing in Wadajir; appliance repair in Halwadag; or photographer/videographers in Whardigle.