

IMPORTED RICE AND AGRICULTURAL LABOR MARKETS IN LIBERIA – GRAND GEDEH COUNTY



April, 2011 - Oxfam GB
Nanthilde Kamara, Oxfam GB
Emily Henderson, Oxfam GB

EMMA Final Report Sections

Section 1	Executive summary or brief.....	3
Section 2	EMMA approach and methodology	5
Section 3	Situation analysis and rationale for EMMA assessment.....	5
Section 4	Rice market system analysis – key findings	10
Section 5	Agricultural labor market system – Key findings	22
Section 6	Response recommendations	32
Section 7	Annexes	38

Section 1 Executive summary or brief

Grand Gedeh County is one of the counties that is most affected by food insecurity, with 42% of the population being food insecure according to the last food security and nutrition survey carried out by WFP, UNICEF and the MOA¹. This County sees also very high stunting rate (43,4% of the population).

Since early March, refugees fleeing fighting and instability in Ivory Coast have been crossing the border and have become concentrated along the border and the main road in Grand Gedeh county, reaching the figure of 57,000² in this county.

An increasing number of villages are being affected by the influx, their current resources are already limited and the presence of thousands of refugees has affected the self-sufficiency of the community. Food and seed stocks are being depleted, meaning that without assistance many farmers will not be able to plant in time for the next harvest. Food assistance to date has not been sufficient to meet the needs of refugees and little has been done to address the shortages faced by host communities.

Faced with the prospect of growing food insecurity, Oxfam GB decided to undertake a market assessment in northern Grand Gedeh to define the most appropriate response and modalities to address emergency needs. Taking into account existing market-system capabilities, Oxfam GB assessed the viability of innovative programmes targeting refugees and host communities, such as cash-based interventions, local procurement and other forms of support to market actors (e.g. traders).

The Oxfam team prioritized the assessment of rice and agricultural labor markets as these play a key role in people's capacity either to buy or produce food.

Main findings :

Rice market

The influx of refugees (increase of around 30% in the population) has globally resulted in a **substantial increase in imported rice consumption** in Grand Gedeh. The volumes traded by big distributors from Great Monrovia have multiplied by almost three, in line with **the increase in trade of 15-30 % reported by all actors along the chain**.

The market chain has shown a high response capacity and elasticity to demand enabling the rapid adaptation to the new volumes consumed. Recent price increases have been related to global world market price increases, showing that the limit capacity of the market has not yet been reached. To answer to the increased demand and the new market of transit centers, small retailers in transit centers have appeared as new actors along the market chain.

The analysis of actors' capacity concludes that **the market system still has a response capacity in case demand continues to increase**, with additional refugees arriving and local rice stocks running out (the start of the lean season will be sooner for households that have shared their last harvest with refugees). However actors along the chain show heterogeneous capacities, and small wholesalers / retailers and retailers in the villages recognize that they could increase their supply in a period of two to three weeks but with a limited capacity to augment volumes as they have limited access to credit and depend on commercial transportation and status of the roads (that will deteriorate during the rainy season). A sudden and substantial increase in demand would lead to local inflation (in addition to seasonal price increase).

Scaling up the capacity of small wholesalers / retailers and retailers in the villages would then require support in capital and transport. As a consequence, for food aid projects, cash delivery modalities cannot be considered alone for villages along the road from Zwedru to Toe Town, and much less for isolated villages.

Agricultural labor market

Farmers with small and medium sized plots of land have benefited from an increase in the availability of manpower due to the influx of refugees, allowing them to hire laborers to prepare their fields for planting rice. However, **vulnerable**

1 « The state of food and nutrition insecurity in Liberia », October 2010, WFP, UNICEF, Ministry of Agriculture

2 Source: HCR – 11th of April

farmers with small plots of land, who have limited sources of income, have been negatively affected by the influx of refugees, as they have shared their resources and as a result reduced the majority of their food and seed stocks. Their production assets are thus very limited: **they have very few agricultural inputs and a very low capacity to hire manpower for their lowland rice farms.** They decided already to decrease their land size and it is likely that their livelihood will be affected in the long term, with a decrease of food self-sufficiency, an increased dependence on the market, heavier indebtedness, and the use of negative coping strategies.

Looking at refugees in host communities and transit centers, the study didn't allow an estimation of the number of refugees who are farming or who are working on rice farms, or to evaluate their need in terms of labor. **Nevertheless, it appeared clearly that both in transit centers and host communities, some refugees are willing or have already started to farm upland or lowland rice, and request agricultural inputs.** In addition, their source of income is limited and doesn't allow them to meet their basic needs and to start livelihood activities.

Response recommendations

It is essential that further interventions ensure that the affected host communities and refugees are able to meet their food needs as well as investing in livelihoods recovery and protection. The following are the major points that would provide a framework to ensure an optimal response meeting immediate and longer term needs, while ensuring a minimum impact on markets and supporting the local economy in northern Grand Gedeh:

- **For vulnerable small farmers in affected host communities:** to increase vulnerable farmers' capacity to produce rice this year and to protect their livelihood in the long term: combination of rice vouchers, a once-off cash grant and seeds and tools package for targeted vulnerable households of host communities. The cash transfer system would allow them to pay manpower, to pay back their credit and eventually cover their main expenses (food, condiments, hygiene). Vulnerable households and refugees would benefit indirectly from this support.
- **For refugees** (in host communities and in transit centers): **a combined approach of direct in-kind distribution and cash transfers** could be proposed to allow them to meet their basic needs (staple food, condiments, clothes, hygiene items), and support their livelihoods through investing in small income generating activities. This combined approach would empower refugees by giving them choice. It would also support the local economy. However, the type of cash transfer, modalities, scale and targeting should be further studied to avoid any negative impact on the market – for example inflation in the rice market or for other commodities.
- **For refugees who want or have already started to farm,** an additional distribution of seeds and tools would be an appropriate response, allowing them to decrease their dependency on humanitarian assistance at harvest time (August or September).

In addition the following activities should be undertaken to ensure the most appropriate humanitarian response:

- Extend assessments of the imported rice and agricultural labor markets to other areas affected by the refugee influx
- Monitor the imported rice and agricultural labor markets in order to evaluate the impact of the humanitarian assistance and adapt the response accordingly
- Extend market value chain assessments to other key commodities such as seeds, hygiene items (suggested soap, as it is also traditional locally produced), and other food items (suggested market system: cassava, palm oil)

Section 2 EMMA approach and methodology

The Emergency Market Mapping Analysis or EMMA is a rapid market analysis designed to be used in the first 2-3 weeks of a sudden onset crisis. Its rationale is that a better understanding of the most critical markets in an emergency situation enables decision makers (i.e. donors, NGOs, government, other humanitarian actors) to consider a broader range of responses. It is not intended to replace existing emergency assessments, or more thorough household and economic analyses, but instead should add to the body of knowledge after a crisis.

The EMMA team was made of 13 staff members from 2 organizations: Oxfam GB (Lead), and WFP - VAM. The team was organized in two sub-teams, each one was headed by a team leader and covered one of the 2 selected market system. The EMMA concepts, logic and processes were taught by one of the team leaders, acting as EMMA facilitator. Training was provided at the beginning of the assessment (2 days in Monrovia), with additional on-the-job training throughout the course of the assessment on various aspects of the tool. While EMMA is designed to be used by those without economic background, this team had a mix of those with significant market experience and a great majority with none. The team was essentially formed of field monitors.

The EMMA assessment was carried out during 9 days from the 12th to the 20th of April 2011. Field work took place in Monrovia (total of 2 days of training and 2 days of data collection) and mainly in northern Grand Gedeh (total of 5 days of data collection / 2 days of travel for leaders of the study), with secondary sources and desk-based research used to maximize use of available information. At the end of the study the team was split into 2 to allow sufficient data collection time in both Monrovia and Grand Gedeh). Interviews were held with key players in the market system, as well as support players (refer to Annex 4. list of actors interviewed).

EMMA's principles are based on optimal ignorance and appropriate imprecision, the amount of information and the details required to produce useful findings in a limited period of time are kept to a minimum. Methodology is thus mostly qualitative rather than quantitative and analysis follows the "good enough" principle.

Section 3 Situation analysis and rationale for EMMA assessment

Section 3.1 First analysis

Grand Gedeh County is one of the counties that is most affected by food insecurity, with 42% of the population being food insecure according to the last food security and nutrition survey carried out by WFP, UNICEF and the MOA³. This County sees also very high stunting rate (43,4% of the population).

Since early March, refugees fleeing fighting and instability in Ivory Coast have been crossing the border and have become concentrated along the border and the main road in Grand Gedeh county, reaching the figure of 57,000⁴ in this county.

An increasing number of villages are being affected by the influx, their current resources are already limited and the presence of thousands of refugees has affected the self-sufficiency of the community. Food and seed stocks are being depleted, meaning that without assistance many farmers will not be able to plant in time for the next harvest. Food assistance to date has not been sufficient to meet the needs of refugees and little has been done to address the shortages faced by host communities.

The situation is deteriorating quickly : the Grand Gedeh population is chronically vulnerable to food insecurity and the lean season will hit them earlier than usual as a direct result of the undue strain posed by the presence of refugees since beginning of March. In mid-March Oxfam GB carried out a food security assessment in Grand Gedeh, which demonstrated :

- **Limited food availability and use of earlier and negative coping strategies :**

Host communities along the main road were quickly depleting their food stocks. The majority of households had started to reduce their food consumption to 2 or 1 meals per day instead of 3 meals per day in a normal situation and had shifted

3 « The state of food and nutrition insecurity in Liberia », October 2010, WFP, UNICEF, Ministry of Agriculture

4 Source: HCR – 11th of April

to less preferred food (cassava, plantain soups). The most vulnerable households had started to collect wild food in the bush and consume their cassava stocks to complement their food basket earlier than usual.

- **Stress on market**

Market prices had started to increase in the main markets of Northern Grand Gedeh with higher demand and market supplies disruption as the majority of basic goods come from Ivory Coast (the main market in Ivory Coast is Toulepleu where fighting has been reported recently).

In Toe Town, where the concentration of refugees is high, market prices had already increased by mid-March, staple crops' prices had increased by 30%.

Markets prices in Zleh Town and Zwedru had started to increase by the end of March : rice prices had increased by 25%, palm oil price by 40%.

- **Limited income opportunities**

Competition between host communities and refugees for casual labor had already decreased the work opportunities and prevented households from earning income to purchase staple food in the market. Refugees in host communities in Grand Gedeh highlighted their inability to generate income and access basic commodities (complementary food, clothes, communication, transport etc...). This is at stake especially as :

- Food acceptance is low in term of quantity (the current food ration at that time lasted 15 days) and quality (distributed cereal is bulgur although Ivorians are used to rice and cassava. Adults consume it but children are reported to refuse it).
- Many refugees had arrived in host communities without any or with very few assets, after spending several days in the bush. With the difference of currency (FCFA versus Liberian Dollar), some were selling the few assets they had brought to get Liberian dollars.

Some refugees had started small businesses in Toe Town and in host communities along the border but lacked the means to purchase the goods they needed to run their businesses.

- **Increased vulnerability among host communities**

More households were becoming vulnerable, with very limited coping strategies and a threat to their livelihoods in the short and long term. Some refugees stated they preferred to remain in host communities who they considered as their relatives and wanted to farm for the next harvest.

- **Slow and insufficient assistance**

90% of refugees were settled in host communities, and didn't receive appropriate assistance in terms of food, NFIs and protection. Affected host communities hadn't been supported in order to mitigate the refugee influx and the food security situation was getting very critical.

Section 3.2 Oxfam strategy

Looking at the humanitarian situation and acute food and WASH needs, Oxfam GB's global strategy in Liberia focused on emergency response in order to meet the following needs :

- Ensure that refugees have access to water, sanitation and hygiene in transit centers in Grand Gedeh and in Maryland County
- Focus on affected host communities that are not currently receiving assistance

Oxfam GB aims at ensuring connectedness of response, meaning to meet immediate needs and support livelihoods of host communities and refugees so that they start developing sources of income to cover at least part of their own needs.

Faced with the prospect of growing food insecurity, Oxfam GB decided to undertake a market assessment in northern Grand Gedeh to define the most appropriate response and modalities to address emergency needs. Taking into account existing market-system capabilities, Oxfam GB assessed the viability of innovative programmes targeting refugees and host communities, such as cash-based interventions, local procurement and other forms of support to market actors (e.g. traders).

The Oxfam team prioritized the assessment of rice and agricultural labor markets as these play a key role in people's capacity either to buy or produce food.

Section 3.3 EMMA scope

Section 3.3.1 Target population and target groups

The **target population** for both market systems analysed by the study was selected on the basis of the preliminary assessments carried out by Oxfam GB and its partners and on the basis of the intended target population for the Oxfam GB program. The target population is the people who are most affected by the influx of refugees from Ivory Coast, including both the vulnerable households of the host communities that are presently hosting refugees and new refugees from Ivory Coast (in host communities and in transit centers), in Northern Grand Gedeh.

- Vulnerable households in host communities:
 - o Small farmers (land surface below 2 acres, few sources of income, focus on female heads of households)
 - o Agricultural laborers (men and women, Madingo tribe)
- Refugees
 - o Refugees in host communities
 - o Refugees in transit centers

Grand Gedeh was selected on the basis of its chronic vulnerability (high rates of food insecurity) and on the limited humanitarian assistance planned to date. After a food security assessment carried out in March, Oxfam GB pre selected 22 communities affected by the impact of refugees' influx as first area of intervention. The geographic coverage of the EMMA assessment was concentrated on these communities and Zwedru and Monrovia as hubs of trade flows. Refer to Annex 1: List of host communities pre-selected.

Grand Gedeh	
Population in Grand Gedeh (Zwedru not included) ⁵ in Gbarzon and Tchein districts hosting refugees	60,000 persons
Zwedru population ⁶	29,000 persons
Total population in Grand Gedeh today – in Gbarzon and Tchein districts	89,000 persons
Total refugees in Grand Gedeh	42,186 persons (14/04/11) 57,209 (19/04/11) ⁷
Total population today – including refugees	131,000 persons
Refugees in transit centers	6,000 (estimation) persons ⁸
Refugees in host communities	51,000 persons
Vulnerable host communities (on the basis of food insecurity, 42 %) ⁹	37,380 persons
TOTAL target population	37, 830 + 6,000 + 51,000 = 94,830 persons

⁵ Source: Oxfam assessment

⁶ Source: UNHCR

⁷ Source UNHCR

⁸ Source UNHCR

⁹ Food insecurity was used as a proxy-indicator of vulnerability, Food insecurity rate for Grand Gedeh (42%) is extracted from "The state of food insecurity and nutrition in Liberia, comprehensive food security and nutrition survey, Republic of Liberia, October 2010, MOA, WFP, UNICEF".

Section 3.3.2 Selection of critical market systems (key analytical questions)

Selected critical markets

Market systems were selected on the basis of affected populations' priority needs and the Oxfam GB strategy. The number of markets studied was set to 2 according to the resources (HR, vehicles) available for the assessment. Two market systems were selected through ranking following various criteria¹⁰: imported rice as staple food and an essential commodity for immediate food security and agricultural labor as a critical factor for the cultivation in the starting cropping season (essential for food security of next season).

Key analytical questions

Key analytical questions were formulated to specify the priority focus of the study and the specific programmatic questions to which the assessment is expected to answer in order to contribute to programme design.

Imported rice market system – key analytical questions

1. Has there been any change in consumer demand as a result of the refugee influx?
2. What capacity does the imported rice market system have to supply the vulnerable host communities and refugees?
3. What are the main constraints affecting host communities and refugees access to imported rice?

Agricultural labor market – key analytical questions

1. Are host communities affected in their capacity to hire labor as a result of the influx of refugees (accelerated consumption of food and seed stocks)?
2. How to support food / rice production in the context of the refugees influx and what would be the modalities?
3. Would it be appropriate to use the opportunity of availability of refugees labor to support food / rice production?
4. How to ensure that emergency interventions are designed to support (and not undermine) existing long-term interventions?

Section 3.3.3 Gap analysis

For each of the analysed markets the gap analysis (in particular HH shortfall) has been calculated from the household profiles that were established during the assessment. The EMMA does not rely on statistic results but on a good enough qualitative and quantitative picture of the situation of different categories of households. For that, a total of 18 interviews were carried out with households, including:

Target groups	Number of women interviewed	Number of interviews
Small farmers	3	6
Workers	2	4
Refugees in Host communities	3	6
Refugees in transit centers	1	2
Total	9	18

¹⁰ Ranking criteria: 1/ Relation to urgent need, 2/ market system affected by emergency, 3/ fitting to agency mandate, 4/ seasonal factors and appropriateness of the timing, 5/ consistence with Government and donor's plans, 6/ feasibility

Imported rice market

Target Group	Individuals in need	HH shortfall	Other aid	Total gap	Likely gap duration	Preferences for help
Refugees in transit centers	6,000	35 kg (91 kg covered)	15 days food ration (5 kg wheat bulgur, CSB, pulses, salt oil)	210 MT for 12 months => 158 MT for 9 months 17.5 MT per month during 9 months	9 months (April to June)	Cash / In kind food
Refugees in host communities	51,000	15 kg (111 kg covered)	15 days food ration (5 kg wheat bulgur, CSB, pulses, salt oil)	765 MT for 12 months => 574 MT for 9 months 64 MT per month during 9 months	9 months (April to June)	Cash / In kind food
Vulnerable households hosting refugees (42% food insecure HH ¹¹)	89,000 * 0.42 = 37,380	15 kg (110 kg covered)		1,335 MT for 12 months => 445 MT for 4 months 110 MT per month during 4 months	4 months (April to June)	In kind food
TOTAL				Shortfall per month (what people cannot afford) 191.5 MT during first 4 months and 82 MT for following 5 months Additional demand on market (refugees) 57,000 * 127 / 12 = 600 MT per month		

Households' shortfall was calculated on the basis of present consumption (as per Household interview) compared to the annual consumption average of 127 kg / person / year (FAO standards). The gap has been calculated on the basis of the present profile of sources of income and sources of food. In the coming months, reliance on markets for imported rice will increase as rice stocks will soon be depleted. But on the other side, this estimation is based on lowest purchasing capacity estimates for refugees since some Cash For Work (CFW) in transit centers, agricultural labor (40% of income of refugees) and wild food sale (40-50% of total income). As a consequence, we consider that the volumes estimated here will be representative of the shortfall faced by households.

For host community households, the gap has been estimated to last till the harvest of short cycle varieties in lowlands. For refugees, the gap has been estimated until the harvest of lowland rice (long cycle) in December.

While the shortfalls for refugees calculated above represent the quantity that they cannot access to cover their food requirements either by production or procurement, the consumption of rice by the 57,000 refugees represents a net increase in the local demand of rice. The amount of 57,000 * 10.6 kg / month = 603 MT per month (with the simplification

¹¹ The state of food insecurity and nutrition in Liberia, comprehensive food security and nutrition survey, Republic of Liberia, October 2010, MOA, WFP, UNICEF.

assumption that refugees and host communities have similar rice consumption patterns) represents the net increase in rice requirement in the area of Grand Gedeh. The EMMA will not only look at the capacity of markets to supply the gap identified but also at its capacity to cover this global increase in demand.

Agricultural labor market

Target Group	HH in need	HH shortfall	Other aid	Total gap	Likely gap duration	Preferences for help
Refugees in transit centers	$6,000 * 0.5^{12} = 3,000$	Average of 2 acre = 170 US\$ ¹³ ? % gap	No aid	?	Cropping season – 3 to 6 months	Agricultural inputs (rice seeds and tools)
Refugees in host communities	$51,000 * 0.8^{14} = 40,800$	Average of 1.5 acre = 130 US\$? % gap ¹⁵	No aid	?	Cropping season – 3 to 6 months	Agricultural inputs (rice seeds and tools) Cash
Vulnerable households hosting refugees (food insecure HH)	$13,528 \text{ persons}^{16} = 2000 \text{ HH} * 0.65^{17} = 1300 \text{ HH}^{18}$	Average of 2 acres = 170 US\$ * 60 % ¹⁹ = 100 USD	No aid	$100 \text{ US\$} * 1,300 = 130,000 \text{ US\$}$	Cropping season – 4 to 6 months	Food Agricultural inputs (rice seeds and tools) Cash
TOTAL				Shortfall (what people cannot afford): 130.000 US\$ for 1300 households for 6 months		

The assessment did not provide sufficient elements to estimate the gap of capacity for refugee households to cover their need in agricultural labor. For now refugees mainly rely on the investment of their own labor force, but the assumption can be that the labor force remaining for immediate sources of income (and then coverage of immediate basic needs) will be then stretched. We conclude then that there is a gap to be filled also for refugees, either for labor hiring or for covering their basic needs or investment in small Income generating activities (providing income that can be used for basic needs but also for labor hiring).

Section 4 Rice market system analysis – key findings

Section 4.1 Rice market system before the influx of refugees

¹² According to interviews

¹³ According to interviews, average cost of labor per acre is 6000 Lb\$

¹⁴ According to interviews

¹⁵ As refugees can work on their own farm (labor force available at household level)

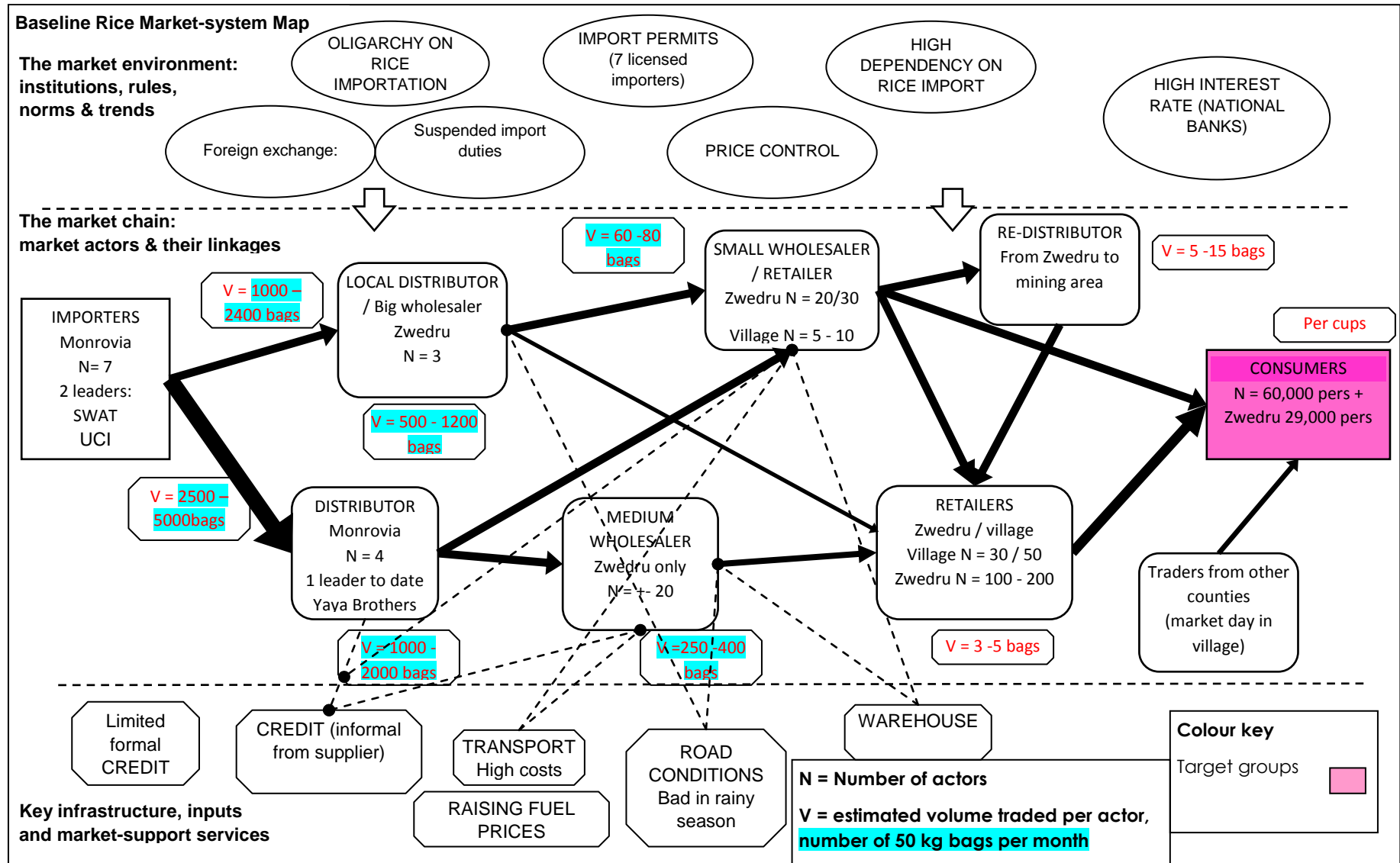
¹⁶ Population with poor food consumption in Grand Gedeh, CFSNS

¹⁷ 65 % of households in Grand Gedeh practice agriculture for food production, 2008 Population and housing census, Liberia

¹⁸ Average number 6.8 members per households, 2008 Population and housing census, Liberia

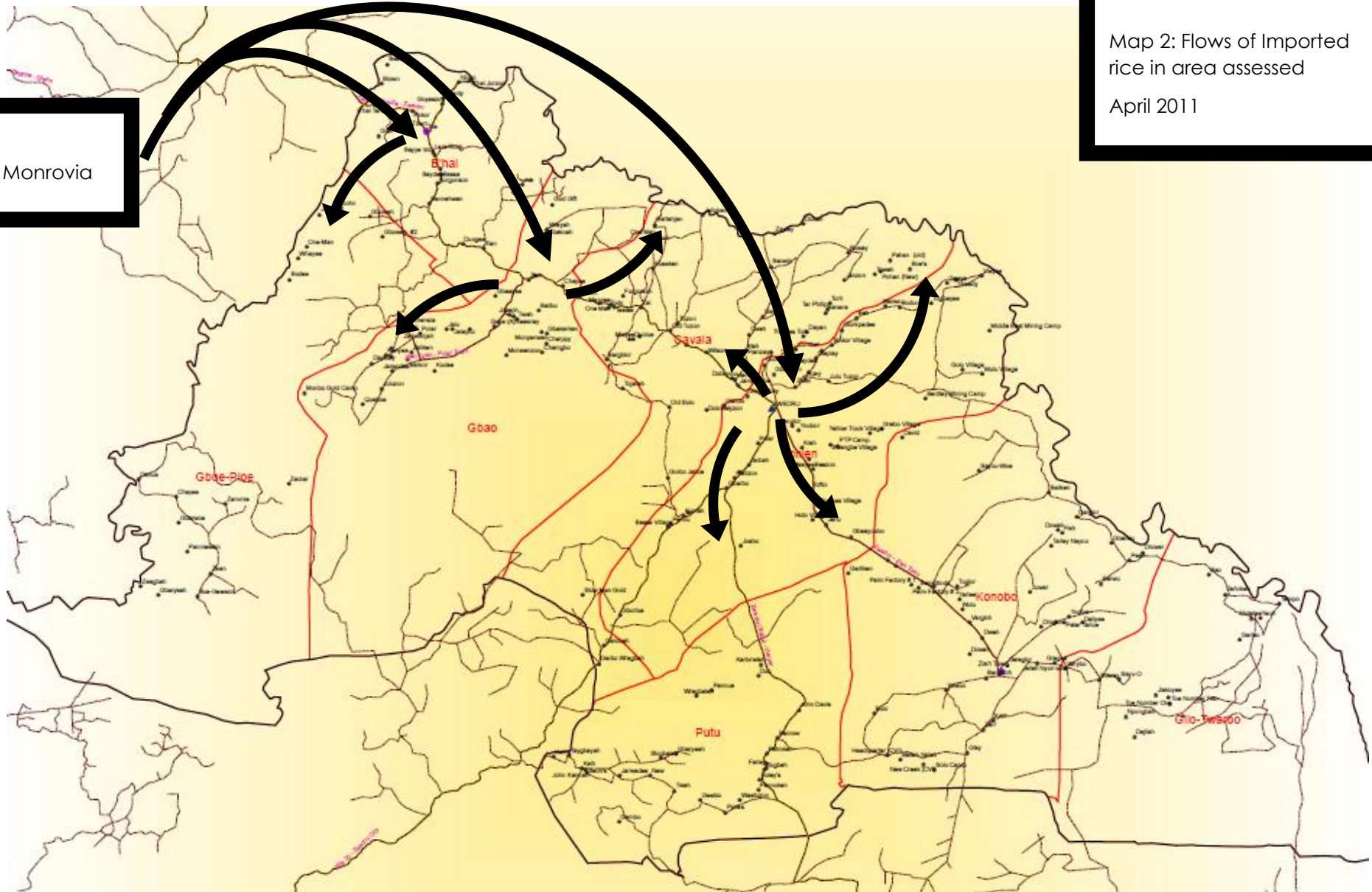
¹⁹ Gap according to interviews

Map 1: Rice market system before the influx of refugees



From Monrovia

Map 2: Flows of Imported rice in area assessed
April 2011



	SEASONAL CALENDAR											
	April	May	June	July	August	September	October	November	December	January	February	March
RAINY SEASON						++						
Upland rice												
Brushing												
Felling												
Slash and burn												
Cleaning												
Planting												
Weeding												
Harvest												
Lowland rice												
Brushing												
Destumping												
Clearing												
Irrigation work												
Nurseries												
Transplanting												
Weeding												
Harvest												
Availability of local rice												
Brick making												
Vegetable production												
Pit sawing												
Remittances												
Palm oil plantation labour												
Market rice												
Price of rice (local rice)												
Price of rice (imported rice)												
Transportation												
Trade volume of imported rice												
Hunger Gap												

Importers: a high degree of market concentration

Liberia is highly reliant on imports to meet domestic requirements, with more than two thirds of food requirements being imported²⁰. It is especially the case for rice – basis of the daily diet – for which Liberia imports 62% of its total annual consumption. Indeed, rice imports are estimated at 280,000 MT²¹ per year against a local production of only 168,000 MT in 2009/2010, for an annual demand for rice of 450,800 MT.²²

Since 2008, as a response to world price rises, and in order to limit price increases on local markets, rice import duties have been temporarily removed in Liberia. Though there is an official end date to this removal of imports duties, the Ministry of Commerce (MOC) has already extended it several times and declared that it would still be extended in 2011, especially in the context of rising fuel prices. According to interviews with MOC, import duties will not be re-established until Liberia becomes self-sufficient.

Rice imports are regulated through the issuance of an import license by the Ministry of Commerce and by the approval by MCI of import requests. The importing company has to pay a one-time form cost of \$25 and US\$ 1 / MT to the Bureau Veritas Group (BIVAC), a private company that is employed by the Government to carry out pre-inspections of imported rice. Also, with the privatization of part of the port, a port fee of 0.5 US\$ per bag has been added.

Government of Liberia (GoL) has a fixed price scheme for imported rice: the allowed margin is restricted to a 1\$ per bag for wholesalers. And the MCI employs staff to monitor Monrovia's markets to ensure that agreed upon price levels are applied. The study shows that this margin is only applicable for importers and wholesalers as traders along the chain – especially at the end side, at village level- do not obtain more than 0.5 US\$ per bag as margin. Domestic price, both at the wholesale and the retail level, are essentially adjusted depending on the world market price trends. The retail trade in rice is not regulated.

GOL, through the Ministry of Commerce and trade, has also established a strategic reserve. In that aim, the MCI monitors private stocks in Monrovia, aiming to ensure that a stock level equivalent to six months of consumption (105,000 MT) is always available in the country²³. Today the MOC declares that the reserve amounts to approximately 35,000 MT maintained by three of the importers and expected to last till July 2011. Other consignments are expected in the coming weeks.

Rice import is highly concentrated at Monrovia level in an oligopolistic structure. While there are 7 licensed importers, their relative weight in imports shares has varied over time. At least 75% of imports are always handled by no more than 3 importers among the 7. Today 3 importers control the whole market, and among them the leader (SWAT) holds more than 60% of the market.

The strong degree of concentration can be attributed to the exigencies of the international rice market. In order to buy from rice exporters, international rice traders require "letters of credit" that banks in Liberia do not deliver²⁴. Also, many traders use international rather than national banks, given that the national banks are not competitive (18% interest rate).

Monetization systems of parboil milled USAID also bring rice into the country (4000 - 5000 MT for the last month according to the MoC).

²⁰ The state of food insecurity and nutrition in Liberia, comprehensive food security and nutrition survey, Republic of Liberia, October 2010, MOA, WFP, UNICEF.

²¹ Other reports seem to talk about 200,000 MT per year

²² Idem

²³ The state of food insecurity and nutrition in Liberia, comprehensive food security and nutrition survey, Republic of Liberia, October 2010, MOA, WFP, UNICEF.

²⁴ Cross border trade and food security, Liberia – Sierra Leone, May 2010, WFP, CILSS, FEWSNET, MOA

Distributors / wholesalers in Great Monrovia

The Red Light market in Great Monrovia represents the main source of imported rice for Grand Gedeh County. The imported rice market remains concentrated at distributors' level in Monrovia, as there are around 4 to supply the main traders of Grand Gedeh, one of them has controlled the biggest part of the market (at least 50%) for many years.

Distributors / wholesalers procure rice directly from the importers and supply wholesalers and retailers from Monrovia and all other counties. According to the level of trust, importers can grant informal credit to their clients without interest and for a period varying from a few weeks to a month.

Distributors from Great Monrovia supply medium wholesalers from Zwedru and small wholesalers / retailers from Grand Gedeh, mainly in villages along the road before Zwedru (for the villages located after Zwedru, traders from this main town represent the main source). The majority of small wholesalers seem to have to pay cash when placing the order (sending cash through transporters or through bank from Zwedru), whereas the majority of medium wholesalers seem to be able to access informal credit with no interest. Distributors then use the credit to increase the traded volume and progressively scale up the business (and therefore demand) of their customers.

Major distributors (x4) controlling the supply to Grand Gedeh are the ones located in Red Light market as they have a comparative advantage of standing in front of the terminal for trucks heading towards Grand Gedeh. This enables customers to deal directly with the distributors who will ensure the direct loading of trucks and dispatching to destination.

In Grand Gedeh

The imported rice market in Grand Gedeh is exclusively supplied by the Monrovia pipeline – through a single main road - while cross-border trade with Ivory Coast has not taken place for many years (before the war), due to negative exchange rate differentials and insecurity on the road on the Ivorian side.

Imported rice enters Grand Gedeh mainly through two channels: a) the distributors in Monrovia, who supply local medium wholesalers and small wholesalers / retailers in Grand Gedeh, and by b) local distributors / big wholesalers, located in Zwedru.

Local distributors / Big wholesalers

Three local distributors / big wholesalers control the market of Zwedru with a supply of 500 to 1200 bags each sold over a period of 3 weeks to 1.5 months, according to the seasonality. With their own storage infrastructures (70 to 100 tonnes) and transport resources (3 trucks each, 35-50 MT in total per trader), they have a strong capacity to respond to demand evolutions. To maintain a stable supply capacity during the rainy season, when roads are in an uncertain and bad condition, they preposition stocks in Zwedru from the months of March-April. This also acts as preparation for the increase in demand during the lean season. (May to July, refer to seasonal calendar).

These local distributors / big wholesalers source the rice directly from importers who they pay directly in cash. However they have options for informal credit, which they can mobilize in case of a rise in demand.

The local distributors supply small wholesalers / retailers in Zwedru and retailers from Zwedru and villages as far as the mining areas along the border. Mainly expecting direct cash payment from their customers, they can provide informal credit (no interest) to their regular and reliable customers.

Correlation with the local rice market is very limited, due to the relatively low production and its high orientation towards self-consumption. Grand Gedeh produces around 45% of its annual requirements in rice. All traders consider that the production of local rice has not impacted on their level of trade of imported rice and on its prices. Among the actors of the market chain, only retailers trade both types of rice. Also correlation with the garri market (alternative staple food in the lean season) does not seem substantial as local production is very limited and all garri sold in shops comes from Monrovia.

One of the major constraints on local distributors / big wholesalers is road conditions and transport costs. A certain stability in supply during the rainy season is ensured thanks to stocks pre-positioned before the start of the rainy season. Warehouse and transportation ownership are key factors to this relative stability. Even if all

actors recognize a seasonality in availability, they confirm that – beyond isolated villages – imported rice is never absent from the shops.

Availability of imported rice in villages along the road and in Zwedru is ensured by local distributors of Zwedru and local wholesalers / retailers. Availability in villages nearby the road is ensured by retailers who hire pick-ups or motorbikes. Availability in isolated villages seems much more unstable.

Local small wholesalers / retailers

Small wholesalers / retailers are mainly self-financed and have limited access to informal credit from local distributors / big wholesalers or distributors from Monrovia. They trade from 60 to 80 bags in a period of 3 weeks to 1.5 months according to the season. In big villages like Zleh town and Toe town competition is higher than in small villages as they reach the number of 5 to 10.

Their response capacity is limited by their reduced capital, limited access to credit and lack of storage space.

Retailers

Retailers sell exclusively to consumers per cups and trade from 3 to 5 bags per month. They procure the rice from distributors / big wholesalers in Zwedru, medium wholesalers in Zwedru and small wholesalers in the villages along the main road.

Consumers

Consumers procure directly from retailers and buy per cup. The price of the cup remains relatively stable while it is the quantity per cup that varies according to seasons. The consumption of imported rice is mainly determined by the availability of local produced rice. Whereas local production is not oriented towards marketing, it is focused on subsistence: local rice stocks last between 3 to 6 months. Most consumers will only buy imported rice when their own supplies have run out. Demand for imported rice increases from April and reaches its peak in July, during the lean season. It also increases at the period of Christmas celebrations. When local rice stocks are exhausted, households do not shift their entire cereal requirement to imported rice, but replace part of it with garri and cassava that they produce.

According to the Liberian Ministry of Agriculture²⁵, annual rice consumption per capita is of 127 kilograms in the country.

While consumption of imported rice by households practicing farming (65% of HH in Grand Gedeh) is seasonal (following production cycles), the area is characterized by a substantial fixed consumption (and therefore demand) of imported rice by people involved in mining and youth involved in non-farming activities. This maintains a stable basis of demand for traders.

Rice prices and seasonality in Grand Gedeh

Prices of imported rice in Grand Gedeh are determined by world import prices, transportation costs and road conditions, and local rice harvest times. Liberia's reliance on food imports and vulnerability to international market price volatilities transmits down to the local level.

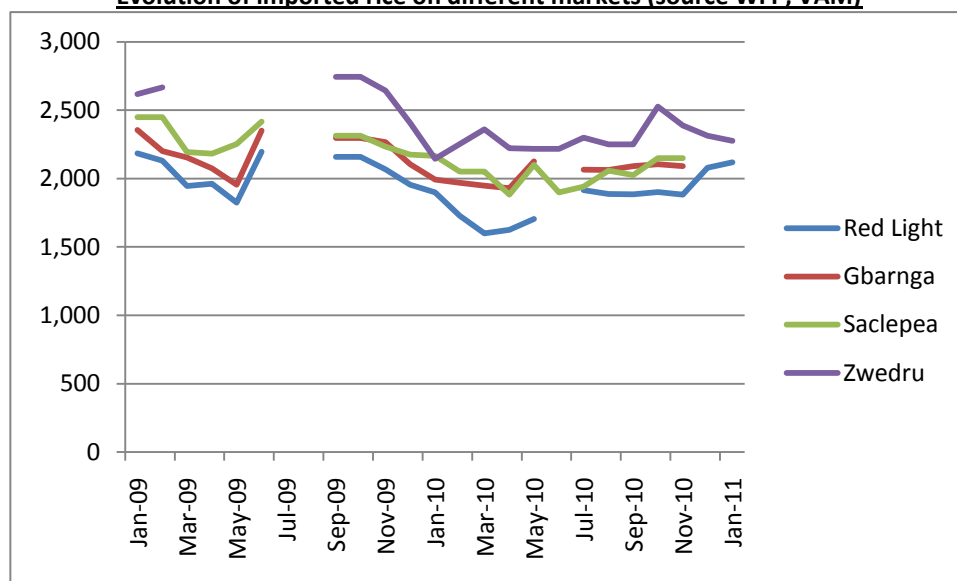
Prices between Red Light market and Zwedru market are relatively well correlated (0.81), showing a fair degree of integration. Variation coefficient for the price of imported rice on Red Light and Zwedru markets remained below 10% in 2009 / 2010, in line with international price stability since 2009²⁶. Prices in Grand Gedeh are higher than in Monrovia due to running costs for the different actors along the chain (not many as the chain is short in its structure) and essentially due to transport costs. Transport from Red Light to villages of Grand Gedeh along the main road costs 4.3 US\$ per 50 kg bag.

According to all traders interviewed, price controls are not operational in Grand Gedeh.

²⁵ The state of food insecurity and nutrition in Liberia, comprehensive food security and nutrition survey, Republic of Liberia, October 2010, MOA, WFP, UNICEF.

²⁶ Idem

Evolution of imported rice on different markets (source WFP, VAM)



Prices decrease from September – October when upland local rice is harvested (as well as lowland short cycle varieties), and further till January as lowland rice is harvested. Though the local rice marketing chain is not strongly interrelated to the imported rice marketing chain (as local rice is not oriented towards trade in Grand Gedeh), prices are interrelated as the harvest is focused on self-consumption and production covers around 3 to 5 months of household consumption. Prices begin to rise as local stocks start to deplete from April - May. Prices remain high during the hunger gap and rise as the lean season reaches its peak in July – August before harvest, also due to the rainy season and the worsening conditions of roads (increase in transport costs and decrease in frequency of supply from the capital). Also the period of high labor hiring and related high consumption of rice leads to a relative increase in demand during the months from March to June impacting on price.

A response capacity limited for small actors of the chain while high(er) for biggest actors

Big wholesalers in Zwedru and medium wholesalers claim that they are able to restock imported rice within 1 to 2 weeks, due to their existing storage capacities, present investment capacities and relations with importers and distributors that extend them informal credit. The situation is different in villages where small wholesalers / retailers supplied from Monrovia (by distributors of Red Light market) and retailers do not have sufficient capital, access to informal credit and storage to answer effectively to a sudden rise in demand.

Section 4.2 Rice market system after the influx

Rice market system after the influx of refugees

The influx of refugees (increase of around 30 % in the population) has globally resulted in a **substantial increase in imported rice consumption** in Grand Gedeh. The volumes traded by big distributors from Great Monrovia have multiplied by almost 3, in line with **the increase in trade of 15-30 % reported by all actors along the chain**. Another indicator lies on the frequency of trucks leaving Red Light market for Grand Gedeh, that has increased from 3 trucks per week to 6 trucks per week since the end of March. The market chain has shown a high response capacity and elasticity to demand, enabling the rapid adaptation to the new volumes consumed. Recent price increases have been related to the global world market price increase showing that the limit capacity of the market has not yet been reached.

In response to the increased demand and the new market of transit centers, small retailers have appeared in transit centers as new actors along the market chain. Procuring bag per bag from small wholesalers in the villages, they trade from 1 to 3 bags a month and sell per cup to customers.

The analysis of actors capacity concludes that **the market system still has a response capacity in case the demand continues to increase**, with additional refugees still arriving and the local rice stocks getting exhausted (start of the lean season will be sooner for households having shared their harvest with refugees). However actors along the chain show heterogeneous capacities, and small wholesalers / retailers and retailers in the villages recognize that they could increase their supply in a period of 2 to 3 weeks but with a limited capacity to increase volumes as they have limited access to credit and depend on commercial transportation and the condition of the roads (that will deteriorate during the rainy season). A sudden and substantial increase in demand would lead to local inflation (in addition to seasonal price increase). Scaling up their capacity would then require support with capital and transport. As a consequence, for food aid projects, cash delivery modalities cannot be considered alone for villages along the road and much less for isolated villages. Food aid support would then require a support to capital and transport capacity to these actors that ensure direct supply to the population and most probably a combination of direct food delivery to support the progressive adaptation of the market and maintain a certain stability in prices.

The multiplicity of actors – of different sizes and capacities - ensures a substantial additional response capacity for Zwedru market. In particular, the local distributors / big wholesalers, still have the capacity to double their supply to 6000 bags a month, on the basis of their existing resources and access to further credit and storage capacity thanks to their business relationships. Within that scaling up capacity, direct cash transfers could then be considered as a modality for food aid projects.

As an indicator of the remaining response capacity of the market, importers and distributors in Great Monrovia, and distributors / big wholesalers in Zwedru are presently ensuring stocks for the lean season, with the prediction of increased demand due to the influx of refugees and the decrease of local rice production as affected host communities don't have enough seeds or decrease their cultivated surface this year (cf. Agricultural labor part).

The bulgur distributed to refugees in transit centers as part of food aid has not undermined the imported rice market, as bulgur is not considered an equal substitute to rice. Traders perceive bulgur distributions positively, as the commodity is partly sold (to the poorest or for animal consumption) to procure imported rice. They consider then that food aid has favoured the imported rice market.

If direct cereal distribution was to shift to pure rice distribution – the preferred staple food for host communities and refugees, the smallest traders along the market chain would be the most affected as their customer base would be reduced, especially at a time when demand is expected to increase. Big and medium wholesalers do not perceive a major threat in food aid as they rely on a large urban and gold mining consumers base.

For reasons that were not analysed during this study, the main importers have stopped providing informal credit to distributors in Great Monrovia, which seems to be leading to a redistribution of power among the 4 distributors supplying Grand Gedeh county.

The imported market rice is progressively shifting from a predominance of butter rice to a predominance of broken rice (fin fin rice from Thailand). Whereas this shift is motivated by lower prices of the broken rice (answering to low purchasing power of the population and apparent changes in the Chinese export market ²⁷), it has been reinforced by the influx of Ivorian refugees who have a preference for this type of rice.

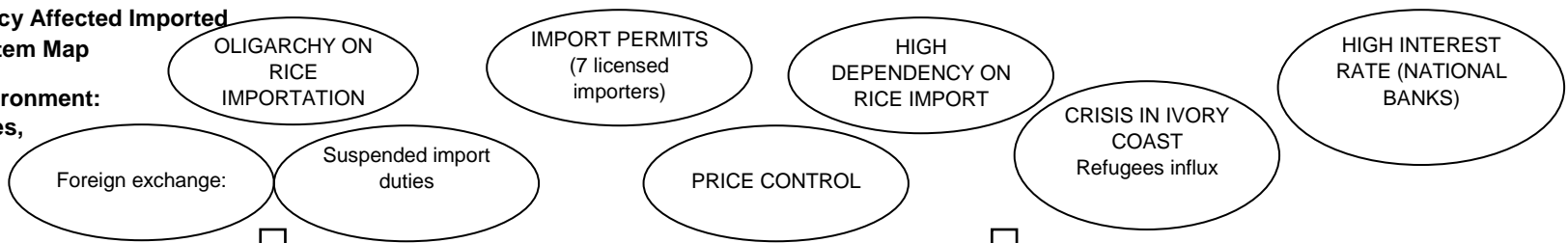
²⁷ Importers made reference to a ban on exports by China from October 2011, explaining the increase on prices of Butter rice.

Rice prices along the market chain

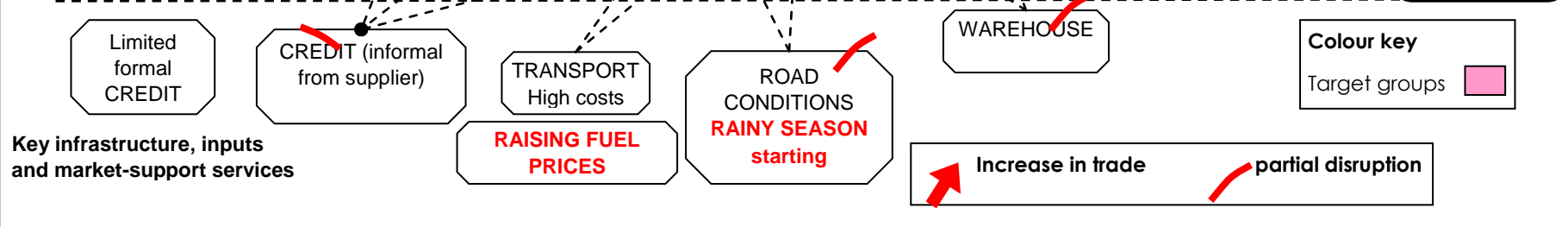
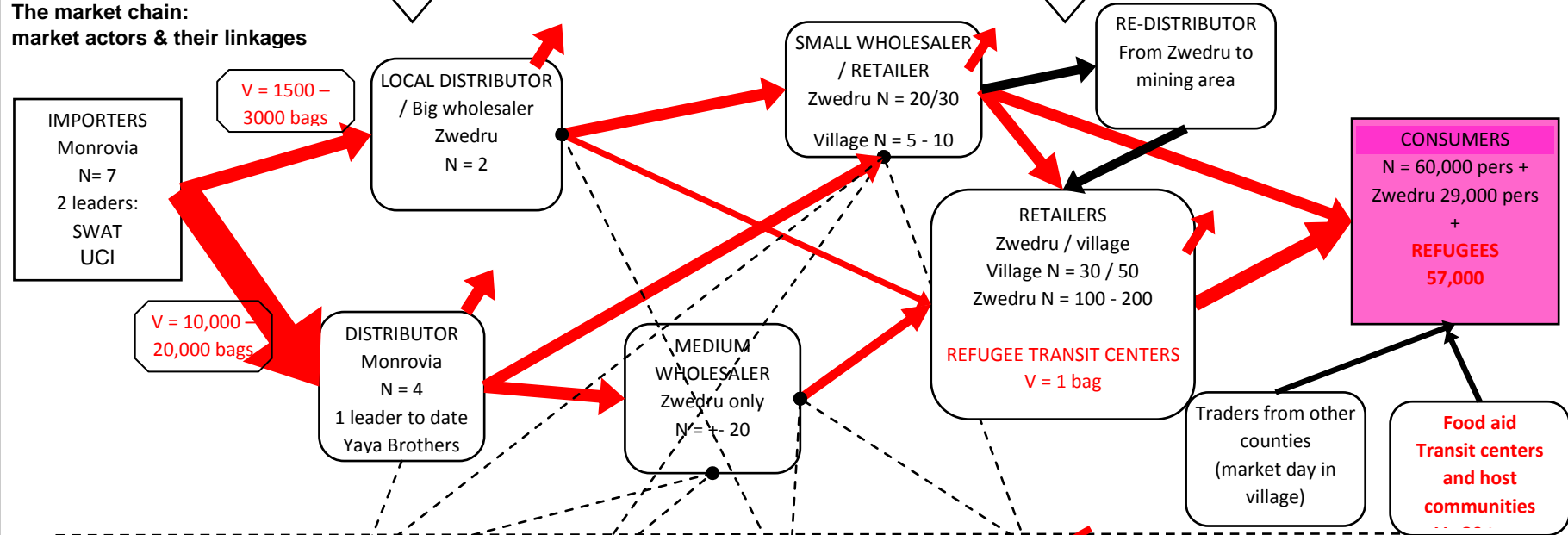
	Butter rice (50 kg)	Finfin rice (broken rice)
From importer to distributor / wholesaler Monrovia	30 / 31.5 Lb\$	27.25 Lb\$
From Distributer / wholesaler Monrovia	31 / 33 Lb\$	28 Lb\$
Transport cost from Monrovia to Grand Gedeh	300 Lb\$ = 4.3 US\$	300 Lb\$ = 4.3 US\$
From distributor Zwedru to small retailer	38.5 Lb\$	36 Lb\$
From medium wholesaler to retailer	36-38 Lb\$	36-37 Lb\$
From retailer (by cup)	23 Lb\$	20 Lb \$

Map 3: Emergency Affected Imported Rice Market-system Map

The market environment: institutions, rules, norms & trends



The market chain: market actors & their linkages



Section 4.3 Capacity of the market to cover the gap

Shortfall per month (what people cannot afford): 191.5 MT during first 4 months and 82 MT for following 5 months

Additional demand on market (refugees) $57,000 * 127 / 12 = 600$ MT per month

The market has shown the capacity to respond to the increase in consumption of rice – estimated at 600 MT per month- due to the increase of total population in Grand Gedeh (refugees' influx).

Analysis of traders' capacity shows that importers, distributors in Monrovia (Red Light) and distributors / big wholesalers in Zwedru have the capacity to answer to the estimated gap of 100 to 200 MT per month. By themselves, the 3 distributors / big wholesalers in Zwedru each have the capacity to increase their trade volume of 100 MT per month provided they have visibility on the requirements. They have capital and opportunities to get credit from importers, and can rely on their own trucks and on warehousing capacity in Zwedru (own warehousing capacity of around 75 MT and possibility to hire additional spaces).

The capacity for small wholesalers and retailers in villages is much more limited and they all highlight that access to capital (credit), and transportation would be limiting factors. They could increase their supply in 2 to 3 weeks but in limited capacities (estimated capacity of increase from 10 to 15%). Increasing the frequency of supply from Monrovia or Zwedru would be the best option for them but they remain totally reliant on transport and road conditions that will deteriorate in the coming months. In contrast to the biggest traders they do not have the capital and storage capacity to make buffer stocks that would stabilize their supply capacity despite the bad road conditions.

The study concludes that cash transfers would be appropriate in Zwedru as traders have the capacity to increase their supplies to the estimated level of gap (higher gaps would require further analysis), but that this would not be appropriate as pure intervention in the villages.

Outside of Zwedru, pure food distribution targeting refugees and host communities would undermine traders activities and income. A combination of cash transfer and direct in-kind distribution should be considered to support local markets without overloading them and risking inflation. In parallel, a support to local actors' capacity (in capital and transport) will allow for the progressive adaptation of the market, maintain a certain stability in prices and allow a direct supply to the population.

As suggested in certain studies focusing on border areas, garri cannot represent an alternative to rice in food aid in Grand Gedeh as garri production (cassava transformation) is limited and garri present in markets comes from the Monrovia market.

Section 5 Agricultural labor market system – Key findings

Section 5.1 Market system before the influx of refugees

As highlighted by the seasonal calendar, the local economy in Grand Gedeh relies heavily on labor and manpower, especially from March until June and in September/ December:

- For agricultural production: cash crop (palm oil, rubber), rice production
- For other types of labor: pit sawing, brick making ...

The study specifically focused on agricultural labor for lowland rice production²⁸, in order to link it with the rice market assessment and with the overall objective of supporting emergency and development program.

The majority of farmers hire manpower for specific activities involved in the production of upland and lowland rice, for example land brushing and clearing, destumping/ felling, planting and harvesting. The average surface is around 2 acres (approximately 1 hectare) for lowland rice.

Activities are gender based, those related to heavy work such as brushing, destumping favour men, whereas planting and harvesting are usually done by women.

The majority of agricultural laborers are paid in cash or in kind (usually in cassava or rice) if farmers have less financial resources Harvest work can be either paid in cash or in kind.

Wages are different among communities and depend on the type of work and its tediousness. Prices are always negotiated between the workers and the farmer, which also explains the difference of price. It is to be noted that for large plots of land, the cost per capita and per surface unit decreases.

Type of work	Wages (in L\$) – per man per day and per acre	Number of workers	Type of worker
Brushing	50 – 133 L\$	5-10	Men
Felling	12- 40 L\$	5-6	Men
Planting	25-125 L\$	3-6	Women
Harvesting	40 – 60 L\$ 10 – 20 kg of rice	2-7	Women
Average Cost for agricultural labor (per acre for the season)	6000 L\$		

Manpower is a limiting factor in Grand Gedeh as the population is low, vulnerable households have few active members who are able to work and agricultural work is in competition with other lucrative activities such as work in cash crop plantation (palm oil, rubber), brick making, timber market, gold mining.

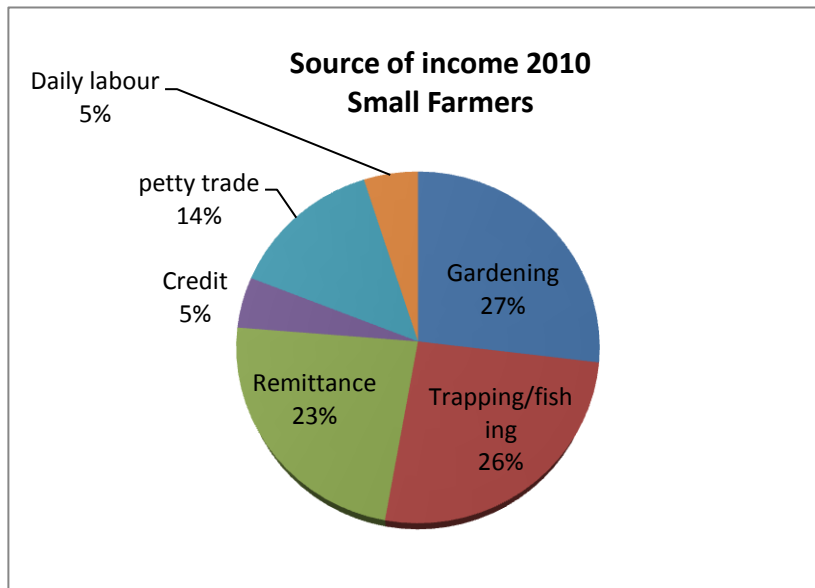
Looking at geographical factors, the availability of manpower is not homogeneous: workers are almost absent in remote communities whereas manpower is more available in communities on the main axis, especially in the “hubs” town: Zleh town, Toe Town and Zwedru

²⁸ Lowland rice is now the main produce in the study area for the majority of farmers as upland rice losses are very high due to pests, disease and birds

Farmers profile:

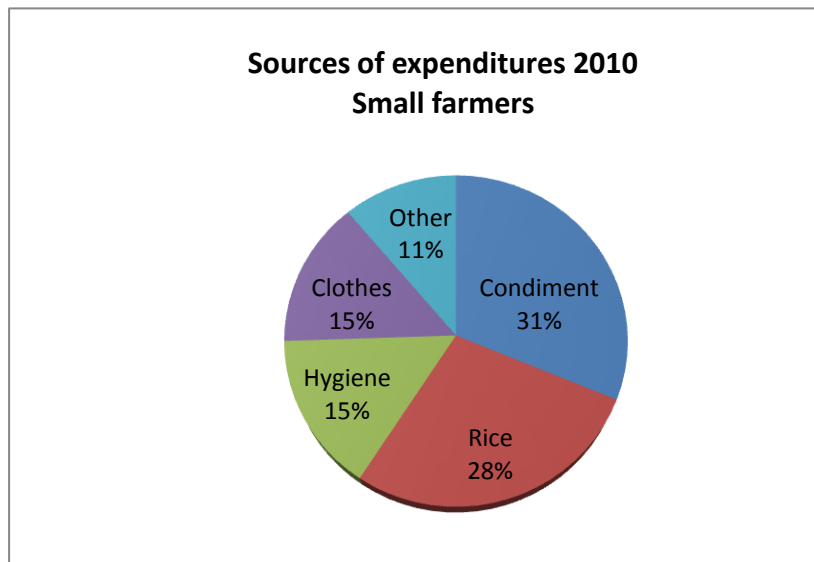
It is to be noted that EMMA methodology is based on qualitative approach: farmers interviewed have been selected on predefined criteria of vulnerability. The results below show trends, but more detailed assessment is necessary to define precisely their profile.

The assessment highlighted that the majority of farmers are small farmers with an average surface of lowland cropping of 2 acres. Their source of income is essentially based on trapping/fishing (for men), sale of vegetables (essentially women) and remittances.



Vulnerable small farmers, usually female heads of household, are also workers for rice production for planting and harvest activities, that enable them to hire and pay workers for their own fields.

There is a second category of farmers small/medium farmers, who cultivate a larger surface (2.5 acres in average or above) but overall, have other sources of income such as remittances and petty trade, who allow them to have a higher financial capacity.



Despite the fact that they are farmers, their 2 main sources of food are equally their own production and market which can be easily explained by the fact that April is the beginning of the lean season, and farmers start to purchase their food on the market. Looking at their expenses, the most important are food items: rice and condiments. Their food consumption, based essentially on cereal (rice and cassava), condiments and wild food, is lower in dry season when their food stocks are exhausted (from April to July). They are eating usually 2 meals per day, and consume between 1 and 2 cups of rice per person per day (350g of rice in average).

Workers:

Workers have different profiles:

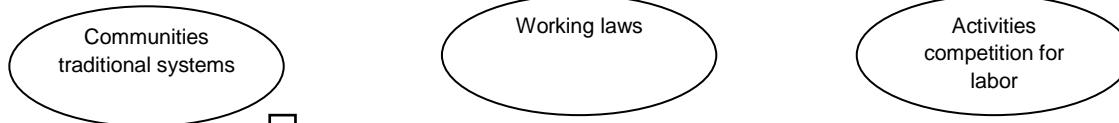
- Very poor local men and women: small farmers who have a very low financial capacity are also working on other farms as agricultural labor, to be able to cover their expenses
- Madingo tribe who don't have access to land and are not farming
- Ivorian workers who are crossing the border to look for work.

They are paid in average 100 Liberian Dollars and work for 20 days during the cropping season. As work is seasonal, workers are often do several different types of work throughout the year: in cash crop plantation, pit sawing, agricultural labor.

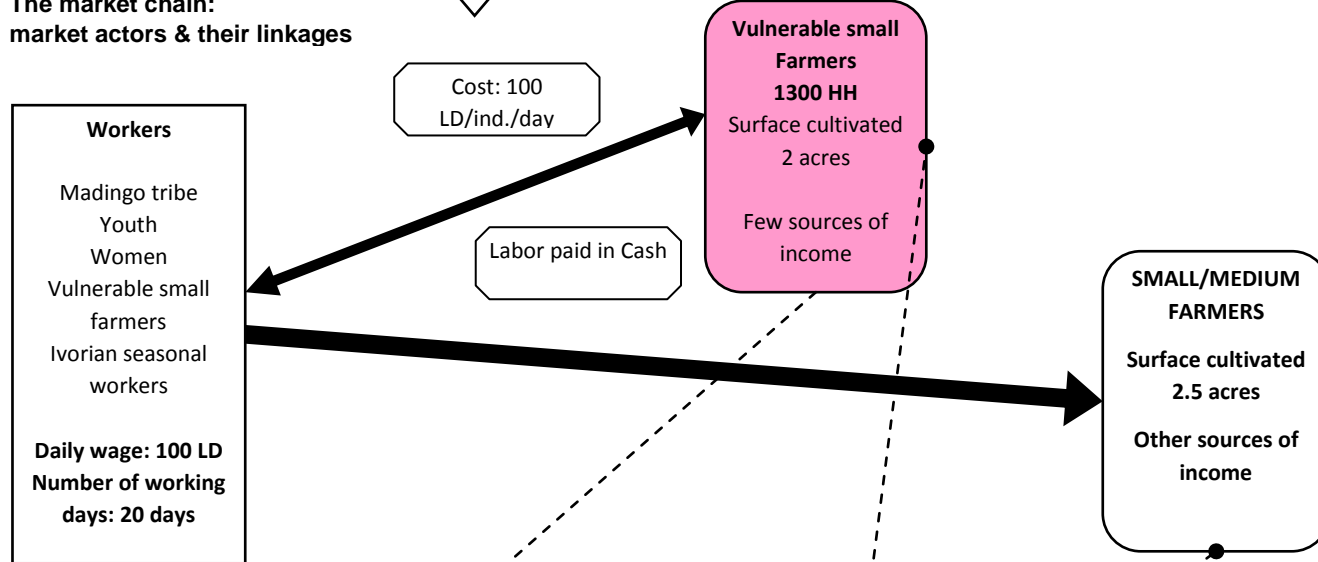
They depend heavily on the market for their food (80 to 90% of their expenses), and consume on average 2 meals per day in a normal year, and 1 cup of rice per person and per day (316g in average).

Map 4: Baseline Agricultural Labor Market system Map

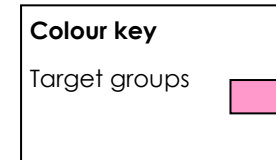
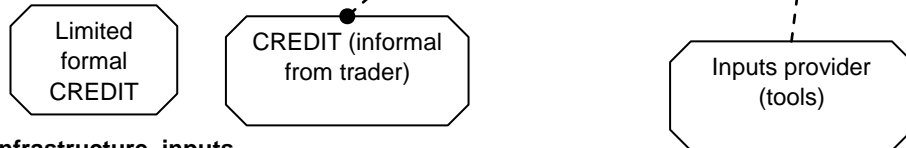
**The market environment:
institutions, rules,
norms & trends**



**The market chain:
market actors & their linkages**



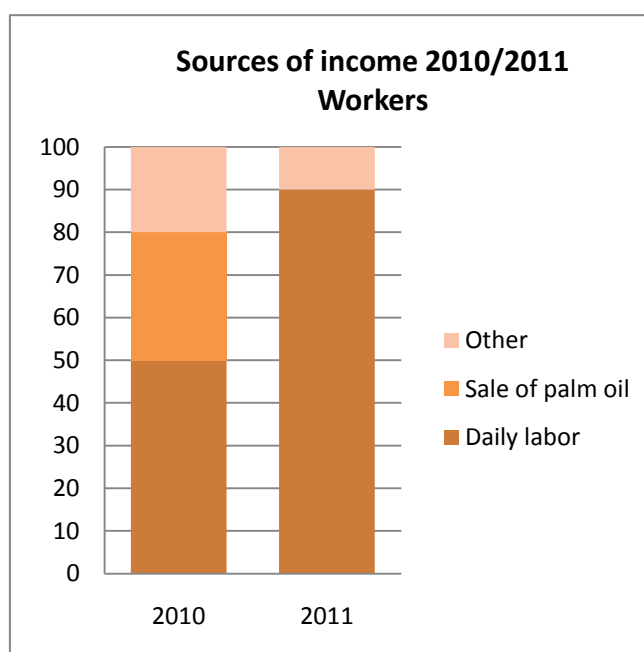
**Key infrastructure, inputs
and market-support services**



Section 5.2 Market system after the influx of refugees

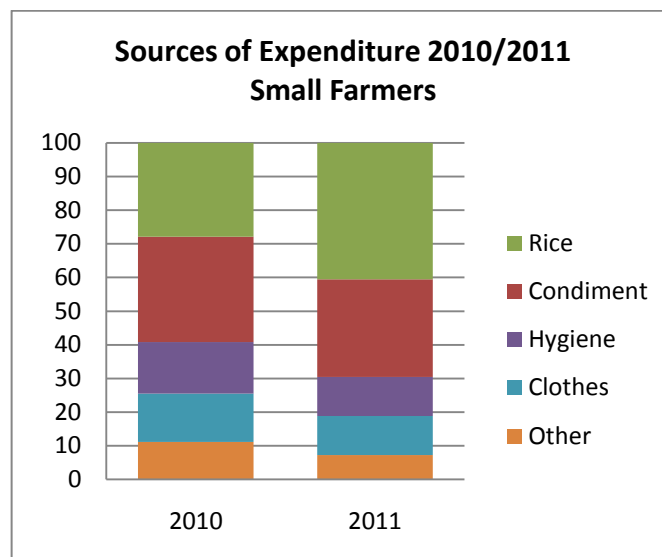
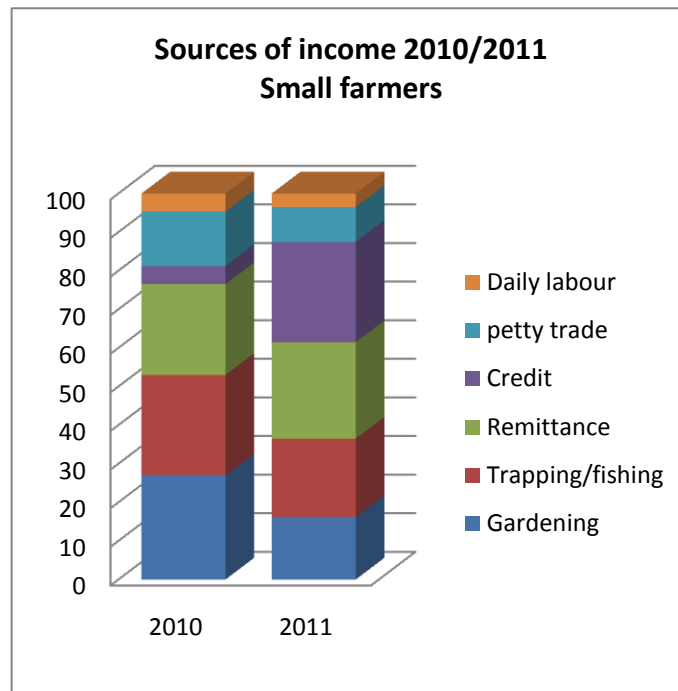
With the influx of refugees, manpower availability increased and some farmers who couldn't find manpower last year were able to hire refugees this year, especially in remote communities. Competition on labor opportunities increased: according to interviews with workers and small farmers, the daily wage didn't change but opportunities to find work decreased, affecting workers and vulnerable small farmers.

For several weeks, large scale Cash For Work (CFW) programmes have been undertaken by NGOs (NRC, Oxfam) to clear and brush transit centers and camp sites, offering additional work opportunities in the area. On average, each worker is paid 3 to 4 USD per day (210 – 280 LD), e.g 2 to 3 times more than local daily wage. Liberian workers interviewed stated that they are working for those programs and earn more money than they are usually paid: and instead, refugees and Liberian women are working on rice fields.



Refugees located in transit centers and host communities are this year the main manpower available for agricultural labor. They seem to be paid less than Liberian workers, but this is not a generality and there are differences between communities. With their income, they mainly purchase rice and condiments (80 to 90% of the expenses) and hygiene products, knowing that assistance is a very small part of their source of food (10%).

Vulnerable small farmers who have depleted their assets hosting refugees, lack the financial capacity to hire and pay manpower. At the time of assessment, vulnerable farmers weren't able to pay labor for the next cropping season (lowland rice) either in cash or in kind. They had increased their use of credit to access basic commodities, essentially rice and condiments and they were intensifying wild food collection in the bush to meet their food needs, as they had already exhausted their food stocks. They had to decrease their food consumption, eating once a day, compare to twice per day last year, and started to enter in the hunger gap 1 month earlier than usual and eat less than 1 cup per person and per day (around 250g of rice).



Vulnerable small farmers plan to decrease their surface of lowland rice this year as they cannot afford agricultural labor costs, on average from 2 to 1.5 or 1 acre. They will be affected in the long term with a very low capacity to meet their basic needs.

In contrast, small and medium farmers who have several sources of income are planning to increase their lowland surface, from 3 to 3.5 acres, and are hiring more workers, from 5 to 7 workers in average.

Refugees interviewed in host communities and in transit centers are planning to farm, respectively in average 1.5 and 2 acres, with their own manpower or (more exceptionally) hiring other refugees for preparing the farm land. Some refugees hired other refugees to clear the farm land selling assets they brought to be able to pay workers, around 200 LD per day and per person.

Their source of income is currently very limited and precarious, especially for refugees in transit centers as they earn money exclusively from daily work. Refugees in host communities have more diversified source of income,

but still limited, based essentially on wild food collection and sale (50% of income), and daily work for agricultural activities or for NGOs programme (50% of income).

Sources of expenditures and of food are slightly the same:

- Refugees in transit centers spend 90% of their income in food, mainly for rice and condiments, the rest is allocated to hygiene or clothes.
- Refugees in host communities spend between 60% and 90% of their income in food (rice and condiments), hygiene items and clothes. They diversify more their source of food, through wild food consumption and host communities' gift.

For both profiles of refugees, food assistance represents only 10 to 20% of their source of food.

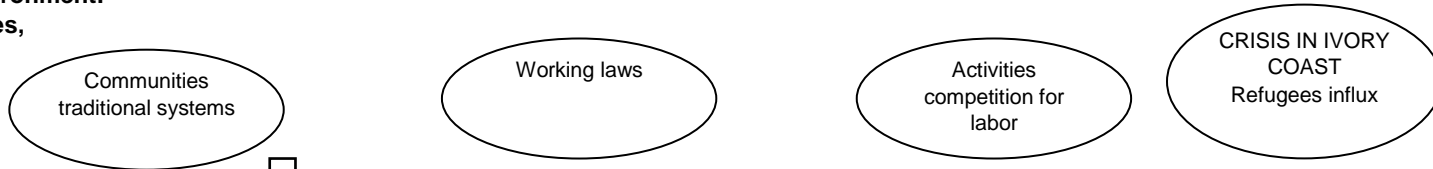
Both in host communities and transit centers, refugees consume between 1 to 2 meals per day, and consume 1 cup per person and per day (around 300g of rice).

All refugees interviewed requested agricultural inputs, food (rice) and cash to meet their basic needs and start economic activities (IGA).

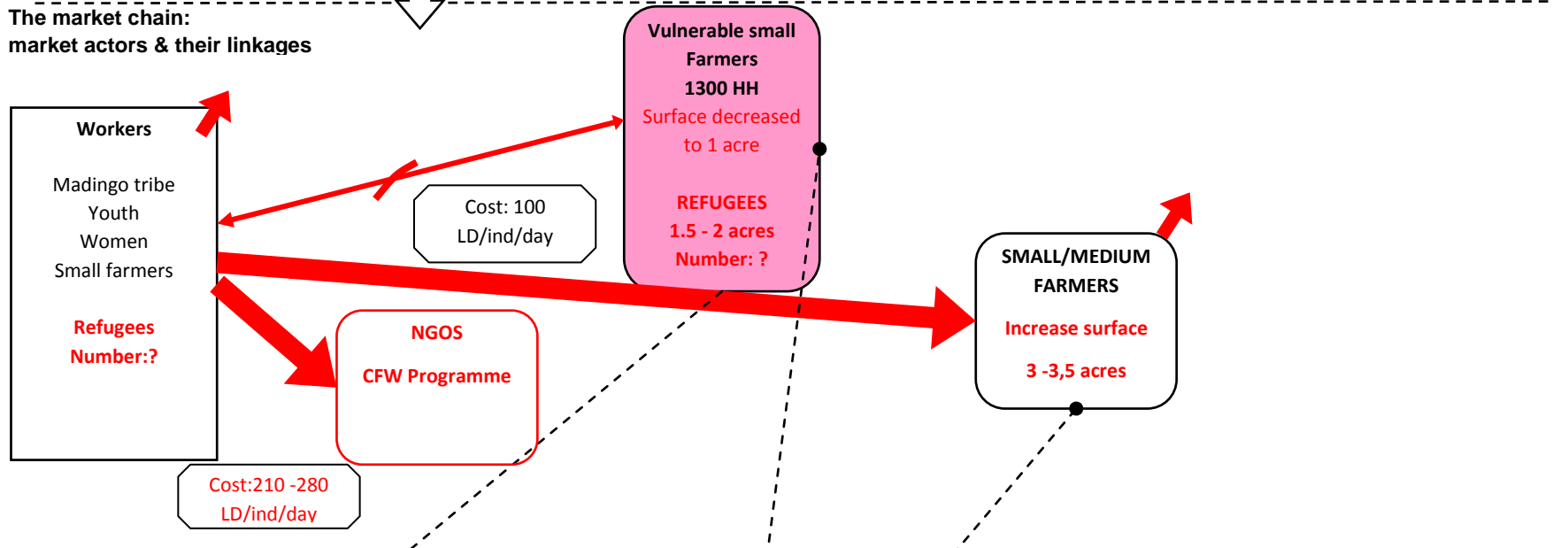
.

Map 4: Baseline Emergency Affected Agricultural Labor Market system

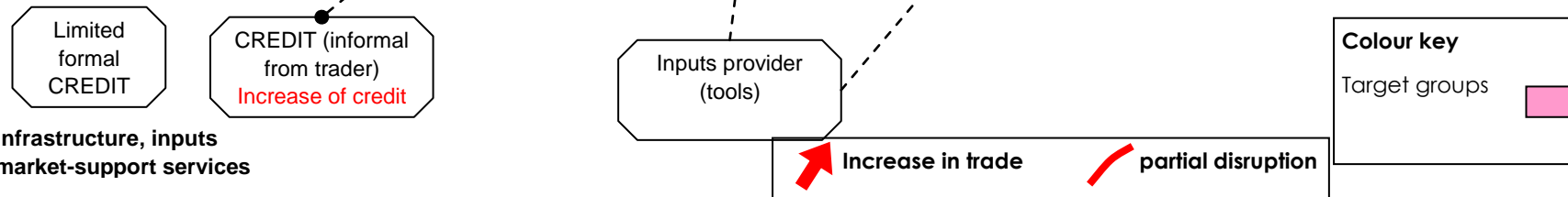
**The market environment:
institutions, rules,
norms & trends**



**The market chain:
market actors & their linkages**



**Key infrastructure, inputs
and market-support services**



Colour key

Target groups

Section 5.3 Capacity of the market to cover / answer the gap

Shortfall per month for vulnerable farmers in host communities (what people cannot afford): 130,000 USD for 4 to 6 months

Additional demand on market (NGOs, small farmers, refugees): ? refugees

Additional offer on market: 57,000 refugees

Despite some farmers hired more workers this year for agricultural activities, the market seems to have a limited capacity to respond to the increase of manpower with the influx of refugees. But NGOs' large scale CFW programmes have absorbed part of it and limited the competition for work opportunities in the area.

Analysis of farmers' capacity shows that small/medium farmers have benefited from increase of manpower's availability, allowing them to augment their surface of rice land. However, small vulnerable farmers, who have limited sources of income have been affected by influx of refugees, depleting their food and seed stock: their production assets are thus very limited: they have very few agricultural inputs and a very low capacity to hire manpower for their low land rice farms. They decided already to decrease their farm land, and their livelihood will be affected on the long term, with decrease of food self-sufficiency, increase dependence on the market, heavier indebtedness and use of negative coping strategies.

Looking at refugees in host communities and transit centers, the study didn't allow estimation on number of refugees who are farming or who are working on rice farms, neither to evaluate accurately their need in labor. Nevertheless, it appeared clearly that either in transit centers or host communities, some are willing or started to farm on upland or low land, and request agricultural inputs. In addition, their source of income is limited and don't allow them to meet their basic needs and to start livelihood activities.

In order to increase vulnerable farmers' capacity to produce rice this year and to recover from refugees' influx and protect their livelihood on the long term, the study concludes that cash transfers would be appropriate in combination with distribution of agricultural inputs (seeds and tools). The cash transfer system would allow them to pay manpower but also to pay back their credit and eventually meet their basic needs (food complements, hygiene). Vulnerable households and refugees (as agricultural laborers) would benefit indirectly from this support.

Looking at refugees (in host communities and transit centers) a combined approach of direct food distribution (cf. findings on rice market) and cash transfers could be proposed to allow them to meet their basic needs (staple food, condiments, clothes, hygiene items), and support their livelihood through investing in small IGAs. This combined approach would allow refugees' empowering, giving them choice and support the local economy. However, the type of cash transfer, modalities, scale and targeting should be further studied to avoid negative impact on the market – inflation on rice market or for other commodities.

Regarding specifically refugees who want or already started to farm, an additional distribution of seeds and tools would be an appropriate response, allowing them to decrease their dependency to humanitarian assistance at harvest time (August or September).

Section 6 Response recommendations

Response-recommendations framework				
Response activities or combinations	Key risks and assumptions	Likely effect on market system and target groups	Timing	Implementation
<p>Combination of food vouchers + once-off cash grant + seeds and tools package for targeted vulnerable households of host communities</p>	<ul style="list-style-type: none"> -Requires coordination with traders at different levels of the chain (at Monrovia or Zwedru level and village level) -Security for cash delivery -Availability of efficiency cash delivery structures - seeds and tools available on time 	<ul style="list-style-type: none"> - Direct impact on food security of vulnerable host communities (mitigate impact of refugees influx on food stocks) - Support to agricultural labor for local production (through cash grant) - Support to agricultural production to mitigate impact of refugees influx on seeds stocks and ensure the next harvest - Support to local market actors through the food vouchers, without excessive pressure on their supply capacity (as part is provided as direct food delivery) -Cash grants will support local markets as amounts will be shared among diversity of commodities - Potentially employment of refugees as daily laborers for agricultural farms 	<p>3– 4 months (according to evolution of humanitarian situation)</p>	<ul style="list-style-type: none"> -Targeting: vulnerable Liberian households - Geographic targeting: Priority on isolated villages (lower access to market, less humanitarian coverage) - Food vouchers for rice - Amount of cash grant defined according to main expenses (study highlighted agricultural labor and condiments for meal preparation) - Anticipation on exit strategy or connectedness with longer term programme

Response-recommendations framework

Response activities or combinations	Key risks and assumptions	Likely effect on market system and target groups	Timing	Implementation	
	<p>Combination of direct food distribution + food vouchers + once-off basic needs / livelihood cash grant + seeds and tools package for targeted refugee households</p>	<ul style="list-style-type: none"> -Requires coordination with traders at different levels of the chain (at Monrovia or Zwedru level and village level) -Security for cash delivery -Availability of efficiency cash delivery structures - seeds and tools available on time 	<ul style="list-style-type: none"> - direct impact on food security of refugees - support to basic needs and early economic recovery - Support to local market actors through the food vouchers, without excessive pressure on their supply capacity (as part is provided as direct food delivery) -Basic needs / Livelihood cash grants will support local markets as amounts will be shared among diversity of commodities 	<p>9 months (according to evolution of humanitarian situation)</p>	<ul style="list-style-type: none"> -Targeting: refugee households - Geographic targeting: Priority on isolated villages (lower access to market, less humanitarian coverage) -food vouchers for rice - amount of cash grant defined according to main expenses (study highlighted hygiene, condiments for meal preparation and support to start of small business) - Anticipation on exit strategy or connectedness with longer term programme
	<p>Support local rice production and marketing to increase self sufficiency and reduce external dependency</p>	<ul style="list-style-type: none"> - Relative low price of imported rice removes economic interest for local rice production - Processing of rice answers to market standards to ensure efficient marketing - Youth access more interesting sources of income (palm oil heads harvest, hunting, rubber tapping, timber sawing...) 	<ul style="list-style-type: none"> - Increase self-sufficiency and reduce dependency on imported rice - Contribute to national food sovereignty - Improve farmers' livelihood 	<p>3 – 5 years</p>	<ul style="list-style-type: none"> - Rice market value chain development approach - Capacity building - Linkage with markets and reinforcement of producers groups

Response-recommendations framework

Response activities or combinations	Key risks and assumptions	Likely effect on market system and target groups	Timing	Implementation	
	Ensure access to credit and micro-credit to small business owners and traders	<ul style="list-style-type: none"> -Microfinance institutions may need support (do they have the capacity?) -Small business owners and traders do not match criteria for credit allocation 	Ensure trader access to liquidity in order to respond to market evolutions	3 months	<ul style="list-style-type: none"> - Feasibility analysis in particular for adaptation to emergency response (analysis of existing systems – capacities and constraints, proposition of innovative approaches...) - Partnership with micro-finance institutions - Anticipation on exit strategy or connectedness with longer term programme
	Monitoring of imported rice market and agricultural labor as update of present EMMA assessment	Insufficient resources to ensure monitoring (HR, vehicles, etc...)	Flexibility of programmes to be adapted to the results of the monitoring	Every month (to be adapted also according to evolution of humanitarian situation)	<ul style="list-style-type: none"> -Design of monitoring form (selection of parameters to be followed) -Mid-term evaluation / monitoring reviews
	Market chain analysis for seeds	Insufficient resources to ensure assessment (HR, vehicles, etc...) It becomes too late for it to be relevant for humanitarian response	Advise seeds supply modalities for humanitarian response According to results support national market Support local seed production and	Now – April 2011	Assessment

Response-recommendations framework

Response activities or combinations	Key risks and assumptions	Likely effect on market system and target groups	Timing	Implementation	
		food production for self sufficiency			
	Market chain analysis for hygiene items (suggested soap, as it is also traditional locally produced)	Insufficient resources to ensure assessment (HR, vehicles, etc...) It becomes too late for it to be relevant for humanitarian response	Advise hygiene items supply modalities for humanitarian response According to results support local markets Mitigate negative impacts on traditional soap production and eventually support it Coverage of refugees hygiene basic needs	Now – April 2011	Assessment and recommendations
	Assessment of other market systems (suggested market system: cassava, palm oil)	Insufficient resources to ensure assessment (HR, vehicles, etc...) It becomes too late for it to be relevant for humanitarian response	Advise commodities supply modalities for humanitarian response According to results support local markets Mitigate negative impacts on local production and support it Coverage of refugees basic needs	Now – April 2011	Assessment and recommendations
	Consultation and collective agreement with concerned actors on payment fees for cash for work	-Lack of coordination among actors -Different interests and mandates between actors	Avoid diversion of labor from agricultural production support staple food production	Now – April 2011	<ul style="list-style-type: none"> - Meetings - Agreements - Launching coordination

LIST OF ABBREVIATIONS:

CBI	Cash Based Interventions
CFW	Cash For Work
CILSS	Comite Permanent Inter Etats de Lutte contre la Secheresse dans le Sahel
GOL	Government of Liberia
EMMA	Emergency Market Mapping Analysis
FAO	Food and Agriculture Organisation
FEWSNET	Famine Early Warning System Network
HH	Household
IGA	Income Generating Activities
MOA	Ministry of Agriculture
MOC	Ministry of Commerce
VAM	Vulnerability Analysis Mapping
WFP	World Food programme

BIBLIOGRAPHY

- Cross border trade and food security, Liberia – Sierra Leone, May 2010, WFP, CILSS, FEWSNET, MOA;
- The state of food insecurity and nutrition in Liberia, comprehensive food security and nutrition survey, Republic of Liberia, October 2010, MOA, WFP, UNICEF.
- Republic of Liberia, Market Review (LMR), conducted December 2006 – February 2007, Monrovia, July 2007, GoL, FAO, WFP,
- Liberia: Household Food Security and Nutrition Surveillance Conducted in November-December 2009
- Liberia market price monitor: A monthly price analysis of food and other essential commodities, January 2011
- Liberia market price monitor: A monthly price analysis of food and other essential commodities, December 2010
- Liberia market price monitor: A monthly price analysis of food and other essential commodities, November 2010
- Liberia market price monitor: A monthly price analysis of food and other essential commodities, October 2010
- Liberia market price monitor: A monthly price analysis of food and other essential commodities, September 2010
- Initial refugee assessment, Ivorian refugee influx and food security, Liberia, January 2011, WFP
- Emergency Market Mapping and Analysis, Toolkit, Mike Albu, Practical Action Publishing Ltd, Oxfam GB 2010

Section 7 Annexes

Annex 1 – List of communities pre-selected by Oxfam GB (Initial survey)

No.	Name of community	Estimated population	Refugee population
1	B'Hai Tarway Town	1097	184
2	Towah Town	350	147
3	Parkor Town	1200	135
4	Bah Town	8300	24
5	Senewen Town	4500	117
6	Dougee Town	8300	928
7	Tian Town	1858	1191
8	Zleh Town	5000	2626
9	Pouh Town	5036	1932
10	Gaye Town	1775	414
11	Polar Town	2888	173
12	Tuzon	Na	2276
13	Gbeayea Town	877	170
14	Garley Town		807
15	Solo Town	Na	56
16	B'Hai Tarway	Na	184
17	Blown Town	Na	1011
18	Zai	3500	1516
19	Gwein Town	1346	247
20	Barblor Town	2010	405
21	Toe's Town	9000	5593
22	Zwedru	29000	5870
	Total	82537	20156

Annex 2 – Additional facts on rice imports

Before 2008, import related charges, in addition to the CIF Monrovia price, included an import duty (of US\$ 44/MT in 2007), National port authority (NPA) charges (of US\$ 12.5/MT in 2007) and an overhead (of US\$ 30 / MT for a total US\$ 87.5/ MT in 2007). B: import duties of US\$ 2.10 per 50 kg bag in May 2008.²⁹

Cocoa and imported rice market chains are tightly intertwined.³⁰

Main importers by order of import volume (April 2011, source WFP).

SWAT (Supplying West Africa Traders Inc)	Contact: Sayon town (more than 50% of the imported rice)
United Commodities Inc	Contact: Jamaica Road intersection, Bushroad Island
Mila Commodities	
Fouta Corporation	
Harmony Radinf Mechlin	
K & K. Trading Corp	
BridgeWays Corp	

Firestone Rubber Plantation also imports parboil rice for employees who receive a monthly allotment as part of their compensation.

Type of imported rice and origins (2010, Source WFP).

Type of rice	Origin	Percentage of total rice imports
Butter Rice	China	41
Thai Parboiled	Thailand	40
Pakistani parboiled	Pakistan	8
American parboiled	USA	6
Vietnamese white (butter)	Vietnam	3
Brazilian parboiled	Brazil	2
Spanish parboiled	Spain	0

“Butter rice” (round Chinese rice) accounted for 90 % of rice imports in 2009 / 2010.³¹

²⁹ Republic of Liberia, Market Review (LMR), conducted December 2006 – February 2007, Monrovia, July 2007, GoL, FAO, WFP,

³⁰ Cross border trade and food security, Liberia – Sierra Leone, May 2010, WFP, CILSS, FEWSNET, MOA;

³¹ The state of food insecurity and nutrition in Liberia, comprehensive food security and nutrition survey, Republic of Liberia, October 2010, MOA, WFP, UNICEF.

Annex 3 Response options

Option	Advantages	Disadvantages	Feasibility and timing
Unconditional cash transfer for food	Beneficiaries can prioritize their needs and preferences Support directly local market	Pressure on small traders and high risk of inflation as stand-alone modality	High 2 – 3 weeks to begin
Food vouchers	Support directly local market Ensures use on food and project impact on food security	Pressure on small traders and high risk of inflation if considered as stand-alone modality Complex as requires agreement with both wholesalers and retailers to ensure that retailers are in measure of supplying Potentially high cost of voucher production	High 2 – 3 weeks to begin
Direct food distribution	Ensures use on food and project impact on food security (provided right food ration) No inflation risk related	Negative impact on small actors of the market chain (reduction of trade volume) High logistic cost due to transportation and distribution Risk of inadequacy of food ration	High 3-4 weeks to begin
Combination of direct food distribution + food vouchers + livelihood cash grant	Cash grant allows beneficiaries to prioritize between their different needs (study shows that needs are highly diverse) Direct support to market actors Limited risk of inflation Takes into account present potentials and constraints of the market chain	More complex in terms of targeting, implementation and monitoring Potentially high cost of voucher production Complex as requires agreement with both wholesalers and retailers to ensure that retailers are in measure of supplying	High 3 weeks to begin
Labor voucher	Ensures use on labor and impact on	Long targeting (need to identify among small	High

	agricultural production	farmers the ones who have insufficient means to pay for labor) Labor fees are based on negotiations and different from one community to the other Fixing fee will be very complex (Competition with NGO programmes offering high fees for casual labor, fee differences between Liberians and refugees)	1 month to begin
Support local rice production and marketing to increase self sufficiency and reduce external dependency	Increase self-sufficiency and reduce dependence on imports and world prices evolutions	Long process For now, rice prices are making rice production not competitive	Medium 5 years
Advocacy towards Government, WFP, UNHCR, and donors to 1/ increase coverage and favour combined approaches in programming (food aid associated to cash transfers) 2/ prioritize also host communities affected by the refugees influx			High 1 month
Advocacy towards Government, NGOs and WFP on negative impact on local markets of pure direct food distribution to favour combined type of responses integrating CT modalities			High 1 week
Monitoring of imported rice market and agricultural labor as update of present EMMA assessment, to extend to other areas affected by influx of refugees	Team is already trained to the methodology Possibility of short listing reduced number of parameters to be updated regularly (suggested every month)	Need to identify the proper moment to update the study as situation is constantly changing	High During the lean season
Market chain analysis for seeds	Will support presently planned responses	Shall be done asap to be relevant	High 1 – 2 weeks max
Market chain analysis for hygiene items (suggested	Will support presently planned WASH	Highly dependent on resources and buy-in	High 1 – 2

soap, as it is also traditional locally produced)	responses Potential support to local production		weeks max
Assessment of other market systems (suggested market system: cassava, palm oil)	Most probably will support early recovery programming	less urgent Palm oil market assessment could start with a baseline before the next year's peak season	High 1 – 2 weeks max
Advocacy towards Government for road rehabilitation and construction	Direct impact on trade flows and prices (through transport costs)	High investment compared to resources Long process For now, this message has lower priority than other ones related to emergency	Medium
Support access to credit and micro-credit to small business owners and traders	Increase response capacity and income for small traders especially in villages	MFI might not cover required range of credit amounts required	Medium 2-3 years
Consultation and collective agreement with concerned actors on payment fees for cash for work			High 1 week

Annex 4 - List of actors interviewed

Company	Contact person	Contact Number	Type of actor
Fawaz	Mr. Fawaz	06 59 76 00	Local distributor / Big wholesaler
Sam Ricky	Samir Ricky	06 10 44 40	Local distributor / Big wholesaler
Mohamed Kone	Mohamed Kone	06 61 21 49	Medium wholesaler
Yayah Brothers Red Light Branch	M.Solo	06515690	Distributor
Road transport Union – Monrovia – Red Light Grand Gedeh branch	Edward – FRTU Supervisor	06 40 77 18	Transporter – light vehicles
Road transport Union – Monrovia Grand Gedeh branch	M. Moses – FRTU Supervisor	06414071	Transporter – Trucks
	Samuel Rizky	06 104440	Wholesaler Zwedru
	Oumarou Kamara	077 912029	Retailer Toe Town

	Cyrus Beah	076 028428	Wholesaler oe Town
	Marie Chea	06 954204	Retailer Zleh Town
	Mohammad Konneh	06 612149	Retailer Zwedru
	Osmah Bah	088 0519229	Wholesaler Zleh Town
SWAT	M.George N.Nehme - President		Importer
Ministry of Commerce	M. Jezee	06835756	

Annex 5 – EMMA team composition

	Name & contact details	Organization	International/ National	Email address
1	Emily Henderson – EMMA Facilitator / EMMA leader for Imported rice market system	OXFAM GB	International	Ehenderson@oxfam.org.uk
2	Nanthilde Kamara – EMMA team leader for agricultural labor market system	OXFAM GB	International	nkamara@oxfam.org.uk
3	Galah Toto	OXFAM GB	National	gtoto@oxfam.org.uk
4	Alfred V. Guines	OXFAM GB	National	alfredguine@yahoo.com
5	Thomas L. Gayeplu	OXFAM GB	National	thomasgayeplu@yahoo.com
6	Roseline Bockarie	OXFAM GB	National	slakumba@yahoo.com
7	Wlekomun Degbe	OXFAM GB	National	wlekomundegbe@yahoo.com
8	Paulue Shar	OXFAM GB	National	pauluesharbeh@yahoo.com
9	Patricial S. Davie	OXFAM GB	National	
10	Jeff Juaquellie	OXFAM GB	National	jefjuaguellie@yahoo.com
11	Emmanuel Anderson	WFP	National	Emmanuel.anderson@wfp.org
12	Benjamin Toe Jr.	OXFAM GB	National	
13	Alfred Chelley	OXFAM GB	National	

Annex 6 – TOR of EMMA study
Liberia EMMA Terms of Reference

Assessment dates: April 12nd to April 21st 2011

Host agency: OXFAM GB

Participating agencies: Oxfam GB, WFP

Emmanuel Anderson (VAM assistant) will participate during the 3 first days of the assessment.

Budget: approx USD \$18,000

EMMA Objectives:

Main Objectives:

- To establish a baseline of the main key-market systems in order to: 1/ assess the market systems prior to the emergency, 2/ to measure the impact of the influx of refugees on the market systems compared to the situation prior to the crisis 3/ to evaluate the impact of the emergency response in short and long term.
- To identify, through appropriate responses (cash/ in-kind/ market support/ advocacy) to meet emergency and early livelihood recovery needs for refugees and affected host communities population in Grand Gedeh county.
In regard to the large influx of refugees and its impact on host communities, agencies are planning or engaged in a number of interventions including: food aid, agricultural programme, protection, wash, shelter. The implementation of an Emergency Market Mapping and Analysis (EMMA) assessment will help identify the most appropriate responses for the immediate and medium-term interventions.
- To build OXFAM GB Liberia's team capacity to use EMMA methodology

EMMA outputs

- Market Maps of selected critical markets
- Seasonal calendar for critical markets
- Refugees and host communities Household Profiles
- Key findings and recommendations report

Key findings and recommendations will be presented April 21st prior to departure of EMMA Leader (Emily Henderson). This report will be disseminated to the wider NGO network and through the sectorial emergency cluster and other interested stakeholders.

Geographical Area

Monrovia, Grand Gedeh County

Potential Critical Markets for Analysis

Oxfam GB has preliminary identified the following critical markets for potential analysis, that should be shared and discussed with other agencies and Oxfam team.

- Rice (local and imported): as main staple crop for both communities and refugees,
- Palm oil: as main fat source and source of income (cash crop)
- Local labor : agricultural labor
- NFI (to confirm): hygiene products (soap, bleach)

A final decision of markets to analyse has been made on the first day of the EMMA with all participants:

- Rice (focus on imported)
- Agricultural labor

Teams

13 participants, included 2 expatriates, taking into account:

- 1 team of 3 monitors and 1 team of 4 monitors
- 2 team coordinators (field coordination of each team)
- 1 facilitator / leader (Emily Henderson) and 1 leader (Nanthilde Kamara)
- 2 persons who could not be present during the field work

All participants speak English and all local staff speaks local language.

Facilitation/training will be primarily in English.

Duration of assessment and working Hours

- 10 days from April 12th to April 21^{nst} Please see schedule below
- Participants should be prepared for long working hours.
- All participants should agree to work the length of assessment, without a break if necessary to complete the work on time. Please inform us if this is likely to be difficult or if there are any outstanding issues that need addressing

Methodology

The assessment will use the methodology in the EMMA Toolkit, comprising ten steps.

1. <i>Essential Preparation</i>	Background research; arrival; consultation with colleagues; agency mandate, target population needs & profiles
2. <i>Select Markets</i>	Selection of critical market-systems; and identification of key analytical questions for each system
3. <i>Preliminary Analysis</i>	Production of initial profiles, seasonal calendars, maps of the market-system; identification of key informants or leads.
4. <i>Fieldwork Preparation</i>	Setting the fieldwork agenda; devising interview structures & questionnaires; data-sheets and recording formats
5. <i>Fieldwork Activities</i>	Conducting the fieldwork activities – who, where, when.

	Section includes guidance on interview methods and tips.
6. <i>Mapping the Market</i>	Finalising baseline & emergency maps, seasonal calendars; description of key features, bottlenecks, constraints
7. <i>Gap Analysis</i>	Comparison of household economic profiles, analysis of priority needs, access and gaps
8. <i>Market Analysis</i>	Analysing impact on availability, conduct, performance, supply and demand, capacity of market-system to react
9. <i>Response Analysis</i>	Exploration of response options, cash and other intervention feasibility; response recommendations and their logic
10. <i>Communicate Results</i>	Consultation with colleagues; presenting conclusions to wider audiences (donors, agencies)

Communications

- Most staff has local mobile phones and these shall be used.
- At the start of field work, participant mobile numbers shall be collected and shared

Administration and resources required:

The following will be required and provided:

- Office space and access to printers and photocopier
- Flip charts/ white boards and relevant markers
- Spare pens/ paper (participants to bring their own note pads)
- Data show/ projector for laptops
- Refreshments during training/ analysis sessions
- Computers (at least one per team)

Vehicles will be provided by:

2 car & driver – OXFAM GB

Financial support: estimated EMMA cost up to 18 000 USD

Assessment Schedule

DAY	Agenda	Comments
Tuesday April 12	<ul style="list-style-type: none"> • Welcome - objectives • <i>Taxi market</i> • <i>Intro to EMMA – What, Why, When, Who</i> • Review of baselines and existing 	<ul style="list-style-type: none"> • <i>Nanthilde</i>

	assessments <ul style="list-style-type: none"> • Selection of target group • Selection of critical markets • Completion of ToR of study • Identify Key Analytical Questions for each critical market • <i>Ten Steps, 3 Strands; EMMA Flow Chart; Main Tools of EMMA</i> 	
DAY 2 Wednesday April 13	<ul style="list-style-type: none"> • Optimal ignorance, Appropriate imprecision • Preliminary mapping = baseline map for each critical market and market affected map • draft seasonal calendar • Examine existing baseline information, incl. HH profiles • Review of key analytical questions • <i>Gap analysis and market analysis training</i> • Fieldwork preparation, questionnaires 	
Thursday April 14	<ul style="list-style-type: none"> • Fieldwork in Monrovia 	Monrovia
	<ul style="list-style-type: none"> • Fieldwork in Monrovia ⇨ Review of market maps and seasonal calendar 	Monrovia
Friday April 15	Trip to Grand Gedeh	
Saturday April 16	<ul style="list-style-type: none"> • Fieldwork • Analysis/Revise Seasonal Calendar and HH Profiles • <i>Analysis/Revise Maps</i> 	Zleh Town
Sunday April 17	Fieldwork <ul style="list-style-type: none"> • Analysis/Revise Seasonal Calendar and HH Profiles • <i>Analysis/Revise Maps</i> 	Polar Town / Zwedru
Monday April 18	Fieldwork Develop market support options Return to Monrovia for 2 leaders	Toe Town
Tuesday April 19	fieldwork Fieldwork Monrovia <ul style="list-style-type: none"> • Develop Response 	Polar Town / Toe Town Red Light, Distributers, Transporters, WFP

	Recommendations	
Wednesday April 20	<ul style="list-style-type: none"> • Reporting • Finalize Recommendations Report 	
Thursday April 21	<ul style="list-style-type: none"> • Reporting 	

Presentation of the results could be done the 25th of April at the Food Security meeting in Monrovia by Nanthilde and to field actors the same week in Nimba and Grand Gedeh counties. Report will be diffused to all stakeholders when ready.

Annex 7 - Questionnaire for household profile and agricultural labor market

SOURCES OF INCOME - What do you do to keep the family going?		
Last year Rainy season List and proportion of total income per activity (agricultural activities shall be included = cassava, rice, vegetable)	Last year dry season	Today
Total amount per month		
Expenditures What do you spend your money on?		
Last year april List of sources of expenditure and proportion of total expenditures for each	Today List of sources of expenditure and proportion of total expenditures for each	
Total amount per month (in particular amount spent in rice: local and imported shall be distinguished)		
Sources of food		
List of sources and proportion per source - Procurement in market (cash) - Barter - Credit (in-kind / cash)		

<ul style="list-style-type: none"> - Own production / picking - Gift / food aid 		
AGRICULTURAL LABOR		
Total quantity of work hired (number of man days)		
List activities for which work is hired (and specify number of persons and number of days 1/ last year 2/ this year (already done + intentions)	For which steps did you hire / share work? How many people for how many days? What did you give them? (cash amount or quantity in kind)	Who are this people? Where do they come from? Are laborers available? Where?
Total surface cultivated 1/ last year 2/ intentions for this year	Land size % of surface in rice	Why is there a difference between last year and this year?
Are you a worker? For which type of work? For who? Where?	Gather information for: 1/ last year 2/ intentions for this year	
Rice production	Production last year Duration of stocks	
Rice consumption		
Dry season last year <ul style="list-style-type: none"> - Number of cups per day (of local rice / of imported rice) 	Rainy season last year	Today Why is it different with last year?

Preference		
Do you find rice on the market? Is it different with last year? When is local rice largely available and when is it scarce?	If somebody was to help you to feed your family, what would you prefer? Cash or in-kind food? What type of food	

Annex 8 – Questionnaire to traders

EMMA Liberia Monrovia – Grand Gedeh – April 2011

Data Recording Sheet

Date:

Introduction : present the EMMA study. Its objective is to inform the design of humanitarian intervention taking into consideration the way markets function.

Specify that we will share the findings with them once the study is completed.

We shall gather data also for local rice as we need to understand the inter-relations and what are the impacts of local rice market on imported rice market.

Critical market item: IMPORTED RICE		Business location:		Type of actor	
Type d'information	Units	Baseline (<u>last year at the same time of the year</u>)	TODAY	Evolution ou planned trend in the coming weeks / months	
1. Type of traded rice (imported, local, long grain, broken...)					
2. Do you also trade local rice ? (if					

the actor also trades local rice, make sure you collect also key information for local rice)				
3. Origin / sources of traded and imported rice : where do you procure the rice (location / actors) ? Do you use intermediaries ?				
4. Different seasons of trade (specify the months for high demand season and season of low demand)		<u>Imported rice</u> High season Low season <u>Local rice</u> High season Low season		
5. Quantities traded : specify average volume per month for each season		High season Low season	High season Low season	
6. Quantities of local rice traded: specify average volume per month for each season		High season Low season	High season Low season	
7. Total quantities traded by you and your competitors per unit of time (per month) – ONLY IMPORTERS		High season Low season	High season Low season	
8. To who do you sell the imported		Any difference last year ?		

rice ? type of actor ? average number of actors ? where are they ?			
9. What are the other main actors in the market chain between you and the customer (to show your market chain for their comments)		Any difference last year ?	
10. How do you find competition ?		Any difference last year ?	
11. In which unit do you procure ? in which unit do you sell ? (is there any repackaging)		Any difference last year ?	
12. Sale price (per season) per type of unit		High season Low season	High season Low season What anticipated evolution ?
13. What are the main factors that determine prices ?			
14. Has trade changed for you due to the refugee influx (more / less demand, change in prices of goods or services, change in rules...) ?			
15. How do you cope with those changes ? what have you done ?			

<p>16. In particular, how has demand behaved with the influx of refugees ? (increase, decrease, no change to date) ? Do you manage to answer to the present rice demand? If not what is the demand not covered</p>				
<p>17. What has changed on the market chain due to the refugees influx ? (number of actors ? prices of rice ? supply size ? demand size? Prices or conditions services and inputs ? rules and regulations ?</p>			<p>What further changes could take place in the coming months ?</p>	
<p>18. How have other actors of the chain adapted to the situation ?</p>				
<p>19. How do you perceive the food aid that is taking place (bulgur) ? does this represent a competition</p>			<p>Could it represent a competition in the coming months ?</p>	
<p>20. Do NGOs and WFP represent or could represent a competition for you?</p>				
<p>21. Labor cost to load / unload (is there a seasonality?)</p>		<p>High season Low season</p>		

22. Average stock available (per season)		High season Low season		Are you going to increase your stocks as a result of refugees influx ?
23. Lead- time (between order and delivery)		High season Low season		
24. Main constraints that you normally meet in trade		High season Low season		
25. What are the laws and regulations that you have to follow / that have a big influence in the way to do this trade (import tariffs...)?		Any difference last year ?		Any evolutions planned ?
26. What are the important services that you use ? (transport, storage, communications, financial services) detail which ones				
27. Transport modalities for your procurement Transport cost per unit per season		High season Low season	High season Low season	
28. Transport modalities for delivery Transport cost per unit per season		High season Low season	High season Low season	

<p>29. If greater demand in the emergency zone were guaranteed, to what extent would you be able to increase your supply volume ?</p> <p>30. How long would it take to scale up your supply?</p> <p>31. Where would you find extra supply ?</p> <p>32. What could limit you in increasing demand ? (for example, access to credit, roads conditions / transport...)</p>			
<p>33. Number of other actors who do the same type of trade in the same location (get the contacts)</p>		<p>Difference last year ?</p>	<p>Any foreseeable changes ?</p>
<p>34. According to you, what shall be done to support the sector?</p>			