# EMERGENCY MARKET MAPPING AND ANALYSIS

# RED SORGHUM, MAIZE FLOUR AND SOAP

# CASH FEASIBILITY STUDY

# JUBA, SOUTH SUDAN FOR DEC 2013 CRISIS

# FOLLOW UP ACTION PLAN

**April 22nd- May 4th 2014**

Humanitarian Aid and Civil Protection

OXFAM

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## Abbreviations and Acronyms

| | |
|---|---|
| PoC | Protection of Civilian |
| EMMA | Emergency Market Mapping and Analysis |
| EFSL | Emergency Food Security and Livelihoods |
| FEWSNET | Famine Early Warning Systems Network |
| IDPs | Internally Displaced Persons |
| IOM | International Organization for Migration |
| UN OCHA | United Nations Office for Coordination of Humanitarian Affairs |
| VAM | Vulnerability Analysis and Mapping |
| WFP | World Food Program |

## Section 1: Executive summary

December 2013 violence in South Sudan had killed thousands and displaced more than 900,000 people. It has also led to a serious deterioration in the food security situation, and some 3.7 million people are at high risk of food insecurity in the coming year. Food partners have so far reached about 865,000 people under the emergency operation between January and April 2014 with most of the food being distributed in-kind.

Oxfam decided to implement, with the support of 17 Food Security Cluster member agencies (both local and International NGO) a market analysis in Juba, the target being the IDP living in the UN House. The objectives of this market analysis were for a) Oxfam to explore alternatives to in-kind food aid in its different areas of interventions and therefore inform the program design of its response and other key stakeholders responses. And b) to create a market baseline: ie a body of knowledge, a dynamic understanding of the selected critical markets from reference time to the present crisis. This baseline is meant to be regularly updated in the future by identifying key indicators to monitor.

The Emergency Market Mapping and Analysis (EMMA) methodology has been chosen to implement this exercise. It is a rapid post crisis market assessment tool used to increase understanding of the most critical market systems and to assist in informing market aware emergency responses. The EMMA took place between April 22nd and April 28th 2014, participants followed a two days training from April 22nd to 24th, 2014. Primary data collection employed a variety of techniques including: individual interviews, focus group discussions, key informant interviews and observations in market places over two days. Following the data collection, the team came together for one day of data analysis and review of the response options. During the second week between April 29th and May 4th, additional data was collected by a smaller team from Oxfam to refine the market analysis and a CTP feasibility study was implemented in parallel as an extra step of this market analysis.

In total, around 60 interviews[1] (individual semi-structured interviews and focus group discussions) were conducted covering households, traders, transporters, importers, consumers and Traders' Unions. Secondary data was sought through desk research from recent publications and situation reports from WFP, FAO, IOM, UN OCHA and Mercy Corps.

Based on a) the need for the target group, b) the response objective and the agency mandate, c) the Government and the Sector plans, d) the impact of the crisis on the market systems, e) the need of further information on this market system and f) the good timing of the exercise and of the seasonality, three critical market were selected for the analysis: red sorghum, maize flour and soap). To measure the impact of the crisis a comparison was made between the market systems in reference time (April 2013) and in crisis time (April 2014).

The team determined the key analytical during the first days of the exercise:

- What has been the impact of December crisis on the sorghum/maize flour/soap market system in Juba?

[1] 27 Households questionnaires, 4 focus group discussions, 2 Union trade interviews, 10 wholesalers interviews, 18 retailers interviews.

- Is the current capacity of the sorghum/maize flour/soap market system sufficient to meet the demand of both Juba overall population and of WFP supply for Juba operations?
- What are the anticipated constraints and risks that will affect the sorghum/maize flour/soap market systems in the coming 6 months?

Because of time limitation, trainees seniority and lack of WFP secondary data, the exercise did not achieve the expected quality and conclusions were drawn only when enough evidences have been gathered. The knowledge gaps and assumptions made are highlighted in the report.

The main findings and recommendations of the report are as followed:

## Maize and sorghum market systems

- The vast majority of maize flour and red sorghum moving through Juba market came from Uganda by road. A small portion of the maize flour and red sorghum entering the market came from the South Sudanese production hubs of Yei and Western Equatoria.
- The crisis in South Sudan has severely impacted the maize flour and red sorghum market chains in Juba. Flows to the States (which use to represent 60 to 70% of the volume of trade) have almost completely stopped, mostly because of insecurity along transport routes and at former delivery hubs. At the same time, demand for maize flour and red sorghum has plummeted in Juba and elsewhere because of the massive displacement of the population.
- If the large importers number has not changed after the crisis, some actors are dealing with half as much maize flour as they did prior to the crisis and ten times as less red sorghum.
- Prices all along the maize market chain have dropped from 180 SSP/50 kg sack at the consumer level to 115-130 SSP/sack. As per the data collected, prices remained stable along the red sorghum market chain.
- Despite the decrease in flows, maize and red sorghum market systems in Juba itself remain well integrated, and they have high expandability.
- **Juba red sorghum and maize flour market systems have currently the expandability to meet the demand of Juba overall population and of WFP supply for Juba operation** for two main reasons: the overall IDP population living in Juba represent less than 10% of Juba overall population and the maize and sorghum market systems were trading 60 to 70% more in April 2013 when Juba was supplying up-country market places.
- It is very likely that the Juba market systems could expand to meet the demand of Juba overall population, WFP supply for Juba operation and of the States if trade with up-country was to restart, as the overall IDP population living in Juba (and therefore of WFP supply needs) represent less than 10% of Juba overall population.
- Inside the UN House the demand for maize flour is very low mostly because of the lack of purchasing power. Few vendors (4-5 at the most) are supplying it; however at an inflated price (about two-thirds more than it costs outside the camp). There is no demand for sorghum inside the camp (as WFP is distributing it in kind), therefore there is no sorghum being sold inside the UN house camp. Some of the sorghum distributed in

the camp is sold by the IDP to Juba traders.

- While traders claimed that they could increase supply of either grain (sorghum and maize) if the demand warranted it, their ability to expand is limited by their lack of capital, the insecurity and unpredictability of their situations (meaning that they do not stock) and UN restrictions on shipments into the camp.
- Within the next 6 months, flows and prices will probably remain lower than they were before the crisis, and in fact will remain similar to what they are now. The Juba market should remain highly integrated with markets in Uganda provided that conditions along the road from Nimule remain relatively secure.

## Soap market systems

- The crisis in South Sudan has impacted the soap market chain in Juba and resulted in a drastic drop in demand due to displacement and loss of income for the affected population.
- Despite the decrease in flows, the soap market system in Juba itself remains well integrated and has high expandability.
- **Juba soap market system would have the expandability to meet the demand of Juba overall population and of relief operation for the IDP living in Juba.**
- Inside the camp, several of the 150 shops are selling soap which they stock through periodic trips to bigger markets in Juba. Those shop are however selling for quite an inflated price at 100 SSP per box as opposed to 75 SSP per box in the market outside the camp. Clearly, these vendors are taking advantage of their market power for the few camp residents who can afford their product. The demand for soap inside the camp is quite low.
- The current capacity of the soap market system inside the camp is low. **The EMMA team estimates that the inside market would however have the expandability to meet the demand of the IDP population if the demand was to increase.**
- Flows and prices will probably remain lower than they were before the crisis, and in fact will remain similar to what they are now.

## CTP feasibility study

### Social acceptance of cash

- The economy is monetised and people are used to handling cash. Acceptance of cash within the target group is high and people expressed preference for receiving support through CTP would they be given the option. Selection of the household member to give the cash/voucher to, will have to be done carefully, involving the community (both men and women).
- Several key high profile stakeholders have been visited within RRC and the Ministry of Finance and they expressed no concern about using CTP and mention there was no specific legal restriction from the government side on using them.

### Payment Mechanism

- Mobile money is not legal in South Sudan.
- Money transfer agencies are operational in Juba, but physical access is a major challenge. Inside the UN House itself there is a KCB branch but the IDPs are not entitled

to access it

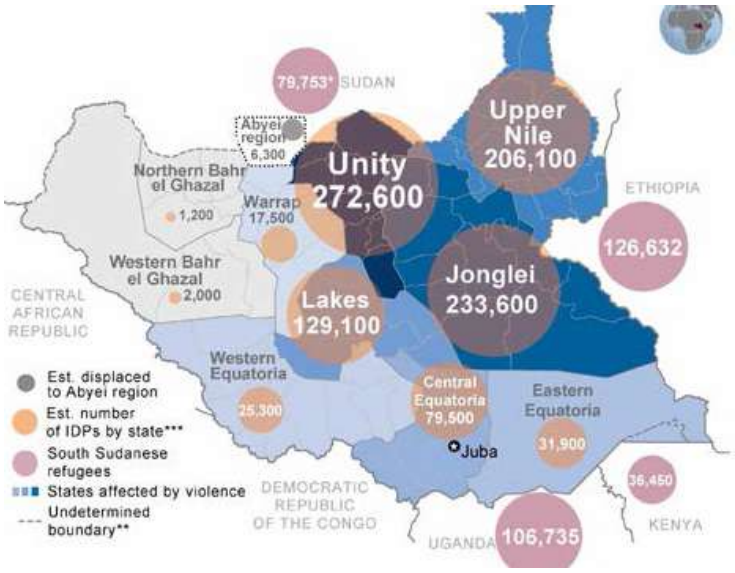
- Money transfer companies are willing to partner with OGB on transferring cash physically within the UN house. Their capacity will have to be carefully crosschecked.
- The transfer charges are between 3 to 5%
- Most of the IDPs have lost their ID documents that is a requirement to access most of mobile banking transfer.
- Money transfer agents use armed escort when moving around with money, this causes a major issue as it is very unlikely that the UN house management will let the agent's escort enters the camps2.
- Access for the outside traders to the UN House needs to be followed up with the camp management.

## Response recommendations

- Oxfam's response in UN House for increased food security and better hygiene should be market aware.
- The soap, red sorghum and maize flour market chains in Juba have been affected by the December 2013 crisis mostly due to the decreased in demand. There are few supply issues as most of the goods are imported from Uganda and the roads between Uganda and Juba are functional. The issues are more demand related issues. Therefore Oxfam response could rely on Juba market and Oxfam could advocate with other actors like WFP for more local procurements.
- It is not recommended to use cash grants, mostly because there is no payment agent accessible in a safe manner to the IDP. Before deciding for any type of CTP, it is key to coordinate with the UNMISS and the camp coordination to confirm feasibility and buy-in of the key stakeholders.
- Recommended response activities:
    - Advocacy for integrating maize flour into the food aid distributed, and procuring both the maize and sorghum through Juba vendors;
    - Commodity voucher for soap distribution;
    - Value voucher as a top up for basic needs; before implementing any value voucher inside the camp, measurement of inside the camp traders' cash absorption capacity should be refined;
    - Conduct market analysis in other Oxfam intervention areas.

[2] ibid

## Section 2: Emergency context




Source: UNOCHA, May 2014

Violence broke out in Juba, the capital of South Sudan, on 15 December 2013 and quickly spread to several other states. Within weeks, thousands of people had been killed or wounded in the violence, and hundreds of thousands displaced from their homes. Despite the signing of a cessation of hostilities agreement on 23 January 2014, fighting between Government and opposition forces has continued, especially in Jonglei, Unity and Upper Nile states, where towns and rural areas have been ravaged by the violence. The armed clash and tense security situation has so far displaced nearly 923,000 people internally, while 350,000[3] fled to neighbouring countries. Among those 923,000 IDP, there are up to 87,000 people sheltering in UN bases, including 13,000 in UN house, Juba. The political and military situation going forward remains uncertain, but there exists humanitarian fallout that is potentially worsening. In the early days of the crisis it was expected that people seeking shelter in UN bases would soon return to their homes, especially in Juba. Five months into the crisis, signs are however that people will stay displaced for longer.

In areas of significant conflict, markets systems have been demolished such as Malakal, Bor and Bentiu forcing people to stay in UN bases looking for protection and access to food and non food items that are no longer available in the markets places. Populations have lost their livelihoods and personal effects, also hampering their ability to return home.

The crisis has led to a serious deterioration in the food security situation, and some 3.7 million people are now at high risk of food insecurity in the coming year including 1.1 million people in the IPC emergency phase, 2.1 million in the acute IPC phase, and some 500,000 displaced people estimated to be at similarly high risk[4]. Food partners have so far reached about 865,000 people under the emergency operation between January and April 2014 but insecurity continues to hamper movement of humanitarian partners. Most of the food aid is currently being distributed in-kind, sometimes through airdrops in the most remote parts of the country.

Furthermore South Sudan faces chronic food insecurity in which the structural 'hunger season' faced by poor and very poor households pushes malnutrition rates over emergency thresholds on an almost yearly basis. Disrupted agricultural cycles, suspension of development programmes, and the potential economic implosion arising from disrupted economic systems,

[3] UNOCHA, April 2014

[4] South Sudan crisis plan, Januray to June 2014

reduced oil revenues, and further austerity, may lead more people to need assistance in the coming months and the country to become more fragile.

Through its humanitarian response in South Sudan Oxfam's objective is to reduce morbidity and mortality by delivering humanitarian assistance in WASH and food security to up to 15% of those affected by the current conflict or around 200-250,000 whichever number is greater. Oxfam also aims at influencing decision-makers to ensure adequate quantity and quality of humanitarian assistance. This includes influencing the humanitarian community in adopting and expanding Cash and market based programming where feasible and relevant, and in carrying out livelihood support as part of relief operation and Protection of Civilians (PoC).

Oxfam is currently supporting Emergency Food Security and Vulnerable Livelihoods of the IDPS in UN house through the distribution of charcoal and milling vouchers. In kind hand grinders are also being distributed to supplement the milling of the sorghum grains as the milling vouchers only cater for 70% of the grains to be milled. Women groups have been supported through the collection of recycles such as plastic bottles as an income generation opportunity. In Awerial Oxfam is addressing food security needs through in-kind food aid. In Jonglei, Oxfam is working in 3 areas (Akobo east, Waat and Lankien) with WFP on GFD for 25,000 beneficiaries and is distributing seeds, tools and fishing gear to 3,500 households. It is also supporting IDP in Melut through Wash and EFSL project. Furthermore Oxfam is implementing EFSL and WASH long-term projects in Upper Nile and plans to intervene in Upper Nile in the field of emergency Food Security with both the IDPs and the host communities. In Lakes State Oxfam is currently supporting Civil Society Organizations to build their capacity and improve service delivery to the populations. Oxfam is also increasing community resilience to climate change through Disaster Risk Reduction project.

The objectives of this market analysis were for a) Oxfam to explore alternatives to in-kind food aid in its different areas of interventions and therefore inform the program design of its response and other key stakeholders responses. And b) to create a market baseline: ie a body of knowledge, a dynamic understanding of the selected critical markets from reference time to the present crisis. This baseline is meant to be regularly updated in the future by identifying key indicators to monitor. See detailed Terms of Reference in Annexe 2.

Juba has been selected for this analysis as a starting point because: a) it is the feeding market for a number of areas in the country where Oxfam operates (Jonglei, Upper Nile, etc.); b) it is as a key implementation area with 2 IDP camps (43,482 persons[5]) and c) because Juba area was a priority for several cluster members. Oxfam strategy is to start with Juba market analysis and then replicate the approach in key areas of the country (corresponding to key routes and key markets feeding Oxfam implementing areas). The objective of this analysis is therefore to inform Juba programming and provide a basis for other areas of intervention.

**The EMMA methodology**

The Emergency Market Mapping and Analysis is a rapid post crisis market assessment tool used to increase understanding of the most critical market systems and to assist in informing market aware emergency responses. EMMA methodology was chosen because it appeared, from Oxfam

[5] DTM 2014/04/25

experience, as an appropriate tool to understand the impact of the December crisis on the market systems and to inform response design.

This exercise followed EMMA standard 10 steps process (see Annexe 1 for the EMMA 10 steps) but the methodology has been adapted based on the work recently done by Oxfam under ERC consortium[6] on pre-crisis market analysis and creation of market baseline. The methodology was both qualitative and quantitative and followed a 'good enough' principle.

The EMMA used both secondary data from previous reports and primary data obtained from field data collection in Juba, UN house and mostly one market place: Konyo Konyo market.

In total, around 60 interviews[7] (individual semi-structured interviews and focus group discussions) were conducted covering households, traders, transporters, importers, consumers and Traders' Unions. Secondary data was sought through desk research from recent publications and situation reports from WFP, FAO, IOM, UN OCHA and Mercy Corps.

In order to assess the functioning of the three selected critical markets systems (red sorghum, maize flour and soap) and the impact of the crisis a comparison was made between the market systems in reference time (April 2013) and in crisis time (April 2014). April 2013 was chosen as the reference time as it was a relatively stable year, after the independence. April 2014 was chosen as the crisis time to be able to base the analysis on accurate present data capturing the current situation with the objective to keep gathering data to update the market maps.

The EMMA team was comprised of 29 team members from 17 Food Security Cluster member agencies, both local and International NGO[8]. See Annexe 3 for the detailed participants list. The exercise was facilitated by Emily Henderson, Emily Sloane and Helene Juillard from April 22nd to April 27th 2014. Participants followed a two days training from April 22nd to 24th, 2014. Thereafter, three teams were formed, one per critical market system selected, each with a team leader. Primary data collection employed a variety of techniques including: individual interviews, focus group discussions, key informant interviews and observations in market places over two days. Following the data collection, the team came together for one day of data analysis and review of the response options.

During the second week between April 29th and May 4th, additional data was collected by a smaller team from Oxfam to refine the market analysis and a CTP feasibility study was implemented in parallel as an extra step of this market analysis.

**Exercise limitations**

- **Time limitation**: only 6 days were dedicated to the exercise itself, including 2 days training in a room, which limited the data collection time. The exercise was also advertised as a training rather than an analysis. As a result, participants focused more on the methodology rather than on the quality of the data they were collecting.

[6] The Enhanced Response Capacity is and ECHO funded consortium comprising Oxfam, Save the Children and Concern Worldwide, aiming to improve the preparedness of humanitarian organisations in responding to slow onset crises, thereby increasing the speed and appropriateness of responses.

[7] 27 Households questionnaires, 4 focus group discussions, 2 Union trade interviews, 10 wholesalers interviews, 18 retailers interviews.

[8] Oxfam, ADRA, ACF, PLAN, IRC, BRAC, FEWSNET, Mile Hope, PCO, ASCDA, HERYS, CADA, UNKEA, MARRD, ACEM, ASTAD, SPEDP.

- **Trainees seniority**: most of the trainees were quite junior and were not familiar with data collection methods. This impacted the data quality and the quality of the exercise outcomes especially considering the short time available.
- **Lack of WFP secondary data**: the methodology and data collection have been defined based on the assumption that WFP would be sharing their data of the market assessment they implemented 10 days before the exercise. However we were not granted access to WFP data, they refuse to share those with us.

Considering the above constraints the exercise did not achieve the expected quality and conclusions were drawn only when enough evidences have been gathered. The knowledge gaps and assumptions made are highlighted in this report. The exercise however still has the potential to contribute to Oxfam's advocacy efforts in country with WFP for a more relevant food aid scheme. In addition the exercise could be used to design future PHP response (soap commodity voucher) and livelihood response (value voucher top up to cover basic needs) inside the UN house.

## Section 3: Critical market systems

**Critical Market System**

During EMMA, selecting the critical market systems is a crucial step. The team considered agencies' experience and FSL cluster priorities when determining the critical market systems for this EMMA. The final decision was taken during the training (Day 2) involving all participants. The key selection criteria that EMMA participants agreed upon were:

- Urgent need for the target group;
- Market systems in line with response objective/agency mandate;
- In line with Government plan/sector plan;
- Impact of the crisis on the market systems;
- Need of further information on this market system;
- Good timing of the exercise and of the seasonality.

Each long listed market systems (Maize, sorghum, plastic sheeting, water, medication, soap, casual labour) were ranked according to those criteria and three critical market systems were selected: maize flour, red sorghum and soap.

According to South Sudan's annual Needs and Livelihoods Assessment in 2013 sorghum is the staple food in the country. Any shocks to this staple market system can have a major effect on the market in general and, therefore, food security. Also a staple purchase constitutes the main expenditure for target consumers (up to 60% for the poor households[9]), the functioning of the sorghum and maize markets systems provide the best indication as to whether CTP is applicable in this context. Red sorghum has been chosen over white sorghum as red sorghum is currently being distributed by WFP in the UN house.

[9] Southern Sudan livelihood profile, Save the Children, FEWSNET & SSCCSE, 2006.

Maize flour is a common staple food in the southern part of South Sudan hence also for many of the residents in UN House, therefore the rationale for the selection of maize flour being similar to the ones for sorghum. Regarding soap, this market system was selected mostly because the EMMA team felt there was little to no information on this system and no hygiene promotion intervention in the UN House.

Following the selection of the three critical market systems, the team determined the key analytical questions for each of the system. Although slightly different originally for each critical markets system, the key analytical questions became similar during the exercise:

- What has been the impact of December crisis on the sorghum/maize flour/soap market system in Juba?
- Is the current capacity of the sorghum/maize flour/soap market system sufficient to meet the demand of both Juba overall population and of WFP supply for Juba operations?
- What are the anticipated constraints and risks that will affect the sorghum/maize flour/soap market systems in the coming 6 months?

## Section 4: The Target Population and Gap Analysis

**Target group profile**

The target population for this study was the IDPs living inside UN House, one of the UN compounds, in the Jebel neighbourhood of Juba. According to the Oxfam staff working inside the camp, the total population there is 13,000[10] individuals, or approximately 1,857 households, based on an average of 7 people per household. The household composition has been impacted by the crisis with some men joining the fighting and not living in the UN House. Most were living in the Juba area before the crisis, but some were living in other parts of South Sudan and came to Juba after the crisis started.

Based on household interviews conducted during the EMMA, the residents were mainly urban or semi-urban before the crisis. While many participated in small-scale agriculture before the crisis, most relied primarily on markets to supply their food needs. Most people bought their sorghum and maize flour from wholesalers before the crisis, though some brought them from retailers.

In Juba livelihood zone, the main sources of incomes are derived from trade in firstly livestock, then crops followed by petty trade and milk sales. Labour is an important income source for the poorest households. If the better off groups are not able to offer sufficient labour opportunities the poor will seek external labour and then either send remittances or return later with goods. Total monthly income for the poor is valued at approximately 3 and half sacks of sorghum (90Kg) for the poor, 5-6 sacks for the middle group and 11and a half sacks for the better off. This depends on the price of sorghum grain in the market places, which often increases by two and a half or three times from the pre to post-harvest value. As in other part of the country, lack

[10] Preliminary figures from IOM registration exercise implemented between May 12th and 14th shows an updated figure of 3,587 households comprising of 14,488 individuals, however the calculations in this report have been made with the 13,000 figures.

of cash in the economy and safe places to keep savings and/or banking services has also affected trade and exchange. Detailed information on the specific pre-crisis livelihoods strategies of the IDP living in the UN House was not gathered, but it seems that quite a few households had salaried family members, and others depended on income from small-medium businesses and/or casual labour activities.

At country level there is a major contrast in food consumption between rural and urban areas with 19% of rural households having a poor Food Consumption Score (FCS) compared with 4% of urban. This is similar for food diversity: 18% of the households in urban areas have a poor food diet compared with 58% in rural areas[11].

Based on the 27 HH questionnaires that the EMMA team conducted, there appears to be a *slight* preference for sorghum among the residents living within UN House, although many households still prefer maize flour. About 25% ate only maize flour before the crisis, while about 25% ate only sorghum before the crisis. About 20% ate mostly sorghum but some maize flour, about 20% ate half sorghum and half maize flour, and a small number ate mostly maize flour before the crisis. This trend is supported by interviews made with VAM unit within WFP. Preferences for maize flour were more or less evenly divided between white and yellow.

It was difficult to get accurate estimates of how much of each grain households were eating before the crisis. The data was not good on this, as there must have been some confusion in units of measure. To summarize the data loosely, the average person in a sorghum-eating household ate 10-15 kg of sorghum/month, while the average person in a maize flour-eating household ate 8-12 kg of maize flour/month.

After moving to the camp, most households have had very little access to livelihoods opportunities. A small number (approximately 150 households, or less than 10% of all households within the camp) operate some kind of small business within the camp, though access to capital is extremely limited. A small minority of families have savings or continuing access to capital (perhaps through social networks), but most have little or no purchasing power. Many households are completely reliant on humanitarian assistance, and can only access cash for basic needs by selling a portion of the food aid they are receiving from WFP.

There are different levels of livelihoods vulnerability within the population. The most vulnerable have little-to-no access to cash unless they sell a portion of the food assistance they receive, while the less vulnerable are able to access cash, either through trade, savings or valuable social connections. The EMMA team was not able to identify a simple and accurate method for dividing households by vulnerability, however agencies working in UN house are currently looking into it.

**Seasonal calendars and livelihood zone**

Juba is part of a livelihood zone described as Hills and Mountains Zone. Administratively the zone spreads across Juba, Torit, Budi and parts of Pibor counties, and partially extends to Magwi and Kajokeji. Households in this zone are mostly agro-pastoral. There are two rainy seasons in this zone, the first one from mid March to mid June and the second from mid July to mid October. Households start planting in April during the full onset of rain. July-August marks the end of the first season and beginning of the second. Crops planted in both the first and the

[11] Report on Food Security and Nutrition in South Sudan, VAM Unit, WFP, 2012

second seasons include: sorghum, maize, cowpeas, groundnuts and sesame. Cassava is critical in bridging shortfalls arising from the poor performance of sorghum[12].

**Seasonal calendar for maize flour**

| Event | Jan | Feb | Mar | Apr | May | Jun | Jul | Aug | Sep | Oct | Nov | Dec |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Input purchases | | | | | | | | | | | | |
| Main harvest | | | | | | | | | | | | |
| Agricultural employment level | | | | | | | | | | | | |
| Flood season | | | | | | | | | | | | |
| High prices | | | | | | | | | | | | |
| Trade volumes | | | | | | | | | | | | |

**Seasonal calendar for red sorghum**

| | Jan | Feb | Mar | Apr | May | Jun | Jul | Aug | Sep | Oct | Nov | Dec |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Planting | | | | | | | | | | | | |
| Harvesting | | | | | | | | | | | | |
| Rains | | | | | | | | | | | | |
| High prices | | | | | | | | | | | | |
| High volume of trade | | | | | | | | | | | | |

**Seasonal calendar for soap**

| Factors | Jan | Feb | March | April | May | June | July | Aug | Sep | Oct | Nov | Dec |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| High Volume of trade | | | | | | | | | | | | |
| High Prices | | | | | | | | | | | | |
| Good road condition | | | | | | | | | | | | |

## Gap analysis

Gap analysis forms one of the three important strands of EMMA together with market and response analysis. Gap analysis helps to combine all available avenues of the commodity the analysis looks at from own production, income and food aid and compares it to households' demand for the commodity – red sorghum, maize flour and soap in this case.

| Commodity | Target group | Individuals in need | HH shortfall | Other aid | Total gap | Likely gap duration | Preferences for help |
|---|---|---|---|---|---|---|---|

[12] Southern Sudan livelihood profile, Save the Children, FEWSNET & SSCCSE, 2006.

| | | | | | | | |
|---|---|---|---|---|---|---|---|
| Maize flour | IDPs in UN house | 13,000 (1857 HHs) | 42 kg/ month | No maize flour distributio n | 77,994 kg/mont h (1,560 50 kg sacks) | Until the end of the crisis | There is openness to cash and voucher programs but concern about safe access to market places selling food items. |
| Red sorghum | IDPs in UN house | 13,000 (1857 HHs) | 42 kg/ month | WFP sorghum (roughly 87.5 kg/HH/ month), additional food rations (oil, legumes, salt) | 0 kg (excess of 77,994kg / month) | Until the end of the crisis | There is openness to cash and voucher programs but concern about safe access to market places selling food items. |
| Soap | IDPs in UN house | 13,000 (1857 HHs) | 6240 Kg Monthly (480 g per person) | 2880 Kg (UNICEF) | 3360 kg Monthly | Until the end of the crisis | Commodity voucher or in kind |

This gap calculation is based on two assumptions: (1) a standard of 400 g of cereal/person/day; and (2) if households inside UN House had the choice, roughly half of the grain consumed within the camp would be maize flour. As a result, there is a negative gap (i.e. an excess) for the sorghum as the households received more than they would ideally consume (50% sorghum, 50% maize).

The amount of sorghum, maize and soap available to households during this period comes only from food aid distributions as there was no own production and the purchase from the market places was negligible (less than 2%) as very few households have access to cash.

## Section 5: Market-system maps and Analysis

Information obtained from various interviews and key informants provides a snapshot of the critical market systems during the reference time in April 2013 and crisis time in April 2014. Data collection tools used are presented in Annexes 4, 5 and 6.

The maps are separated into three layers which include: a) the environment, which is comprised of norms, policies, and weather in which the market chain functions; (b) the market chain, which is comprised of all the market actors directly in the chain from producers to consumers; (c) the inputs and support services, which comprised the infrastructures, inputs and services that are required for the market chain to function efficiently.

The maps below show the interactions between the different environmental factors, market chain actors and support inputs and services within the market chain. The figures provided in the analysis below are the EMMA team's best estimates after two days of data collection. They were not exhaustively verified and should be taken as approximate; trends however have been verified. Conclusions have been drawn only when there were enough evidences on proportions.

Because of their similarities and inter-connexions the maize and sorghum market systems' maps are analysed together.

### 1. Main actors

**Importers and wholesalers:**

Based on EMMA team interviews and Desk review[13], the cereal import business in Juba is controlled by only few established traders (less than 10), most of them based in Konyo Konyo market or its neighbourhood. Demand for maize flour and red sorghum has plummeted in South Sudan following the crisis, as a result supply has dropped. Furthermore Juba importers and wholesalers used to sell between 60 to 70% of their supply to up-country wholesalers. These trading routes have been seriously impacted and the interviewed ones reported zero trade with the up-country wholesalers in April 2014. Most of the importers are trading both maize and sorghum, and the number of these big importers and wholesalers has remained stable between reference time and crisis time. The EMMA team has collected information about reduced number of smaller importers/wholesalers trading in sorghum due to the crisis, these traders have not disappeared, they have just stopped importing sorghum because of the lack of demand and have diversified their supply to other commodities.

Most of the wholesalers in Juba are also importers, they travel 2 to 3 times a month through Nimule route to Uganda to get their supply from there. The EMMA team did not gather enough information on the number of soap importers (very first estimates showed around 100 importers in Juba, but this would have to be crosschecked), but the few interviewed were also getting their supply from Uganda. As for maize and sorghum the volume of trade has drastically decreased after the crisis (from 60 tons per month before the crisis to 25 tons per month after)

The import business is not well regulated. Although the Ministry of Commerce and Trade has positioned some staff to monitor major border trade flow points, proper mechanisms to regulate trade including quality checks is lacking in most cases.

**Retailers**

[13] FAO/WFP Crop and Food Security assessment mission to South Sudan, Feb. 2014

The retailers outside the camps are located either in or around the market places and some are located in the more "residential" area. Retailers are usually trading variety of different food and non-food items. Typically the soap retailers would have small grocery supplies, and the sorghum and maize retailers would sell cereals, spices and condiments. Although it has not been possible to gather exact data on their numbers before and after the crisis, observations in Konyo Konyo market have confirmed that their number has reduced because of the crisis. So is the volume of trade: a soap retailer would for example, trade around 20 boxes of soap per month in April 2013 and only around 15 in April 2014.

Juba's retailers get their supplies from Juba's wholesalers and sell their products to Juba's consumers (non IDP population).

**UN house retailers:**
Out of the 150 shops in the UN House, there is only a small number of retailers (4-5 at most) trading in maize flour due to the low demand. Those who are trading it are supplying only very small volumes from either Konyo Konyo or Jebel markets. There is a market expandability and retailers inside the camp are willing to increase their supply would the demand be guaranteed. However retailers inside UN House face challenges in increasing their supply of maize flour. First, they face some level of security risk every time they leave the camp to resupply, and because of the insecurity and unpredictability of their situations, they do not stock. In addition, they have limited capital with which to pay for additional stock and transport costs. Finally, the authorities at the camp gate need to thoroughly check any goods being brought into the camp for security purposes.

However, those who are selling maize flour inside the camp are doing so for quite an inflated price – 200 SSP/50 kg, about two-thirds more than it costs outside the camp. Clearly, these vendors are taking advantage of their market power for the few camp residents who can afford their product. Because there is no demand for sorghum inside the camp, as WFP is distributing sorghum in kind, there is no sorghum being sold inside the UN house camp, however some of the sorghum distributed in the camp is sold by the IDP to Juba traders.

A similar situation applies to the soap retailers inside the camp: they are trading small quantities, but are willing to increase would the demand be guaranteed within the limits which are the same as for the maize market system. As for maize, the traders inside the camp are selling the soap at quite an inflated price as compared to the outside market place (75 SSP per box outside, 100 SSP inside).

The EMMA team aimed at measuring the cash absorption capacity of traders inside the camp by adding questions on their stock volumes, capital and cash flow. This was not reached due to the poor quality of data collection, but this shall be considered in any next data collection.

**Consumer outside the UN House**
Due to limited time, no household outside the UN house has been visited by the EMMA team. Based on secondary data review, number of consumers in the Juba market decreased by 50% due to displacements linked with the December crisis from around 1 million people to 500,000 as of April 2014. The remaining households have physical access to the four main Juba markets (Konyo Konyo, Jebel, Gudele and Lybia). The main limiting factor is lack of purchasing power, which has drastically dropped in the aftermath of the crisis due to displacement, loss of livelihood opportunities, etc.

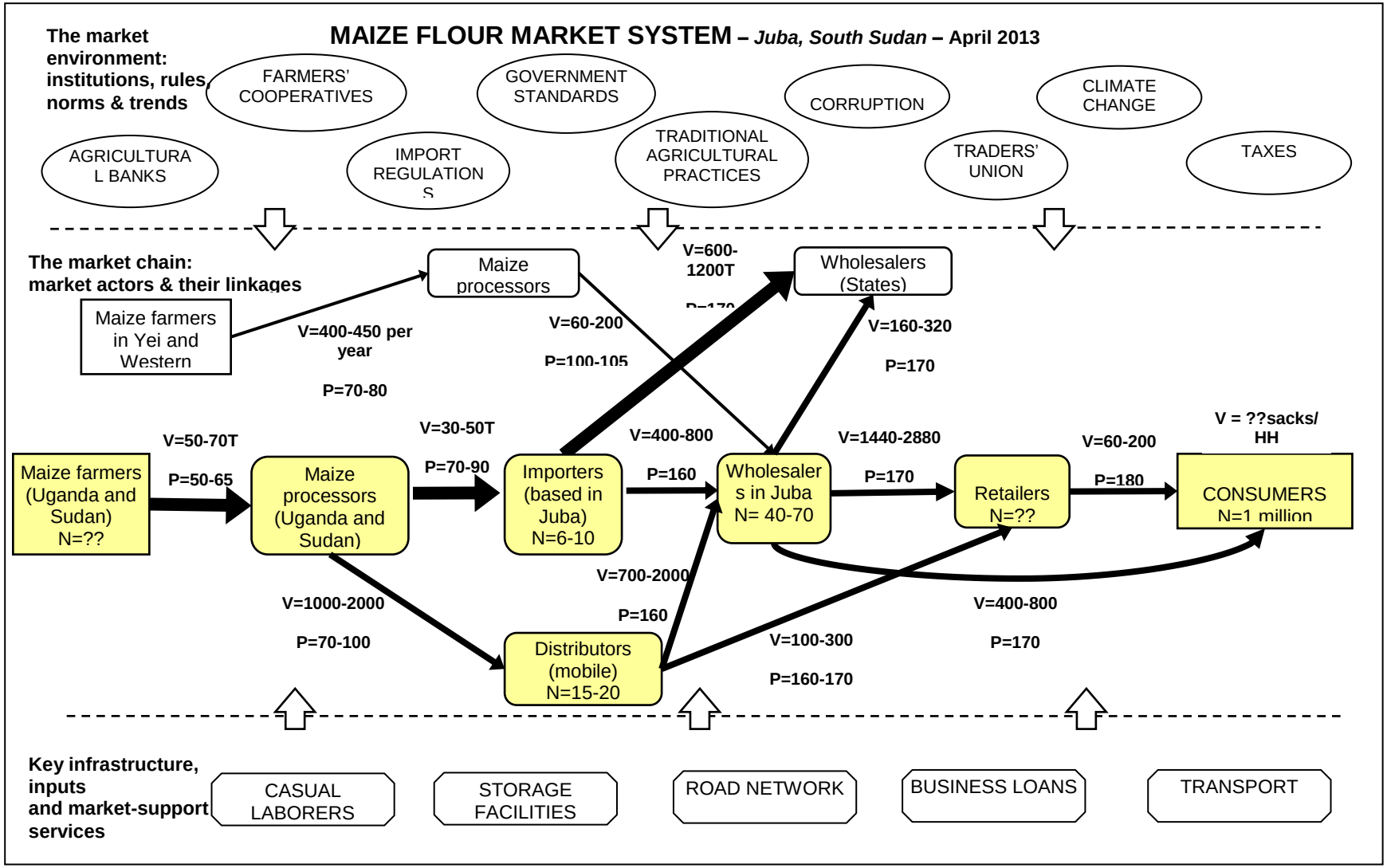
**Consumer inside the UN House**

There are around 13,000 people living in the UN house. They have physical access to the market place inside the camp but face security issue when trying to access the market outside Juba (see above). Anyone venturing outside the camp, especially men and older children, faces serious security risks. Typically only women, who are less likely than men to be recognized as Nuer, visit outside market places. Furthermore, very few people in the camp have any disposable income, and so few are able to buy anything even if they are able to leave UN House.

For the few who visit the outside market places, on average it costs between 6 and 10 SSP in transport (both ways trip) to go from UN house to the outside closest market (Jebel market).

## 2. The maize flour and red sorghum market systems

**Maize flour Market System in the Baseline Year**




Volumes are in 50 kg sacks per month except where otherwise indicated. One Ton (T) = 20 50 kg sacks

Prices are in South Sudanese Pounds/50 kg sack.

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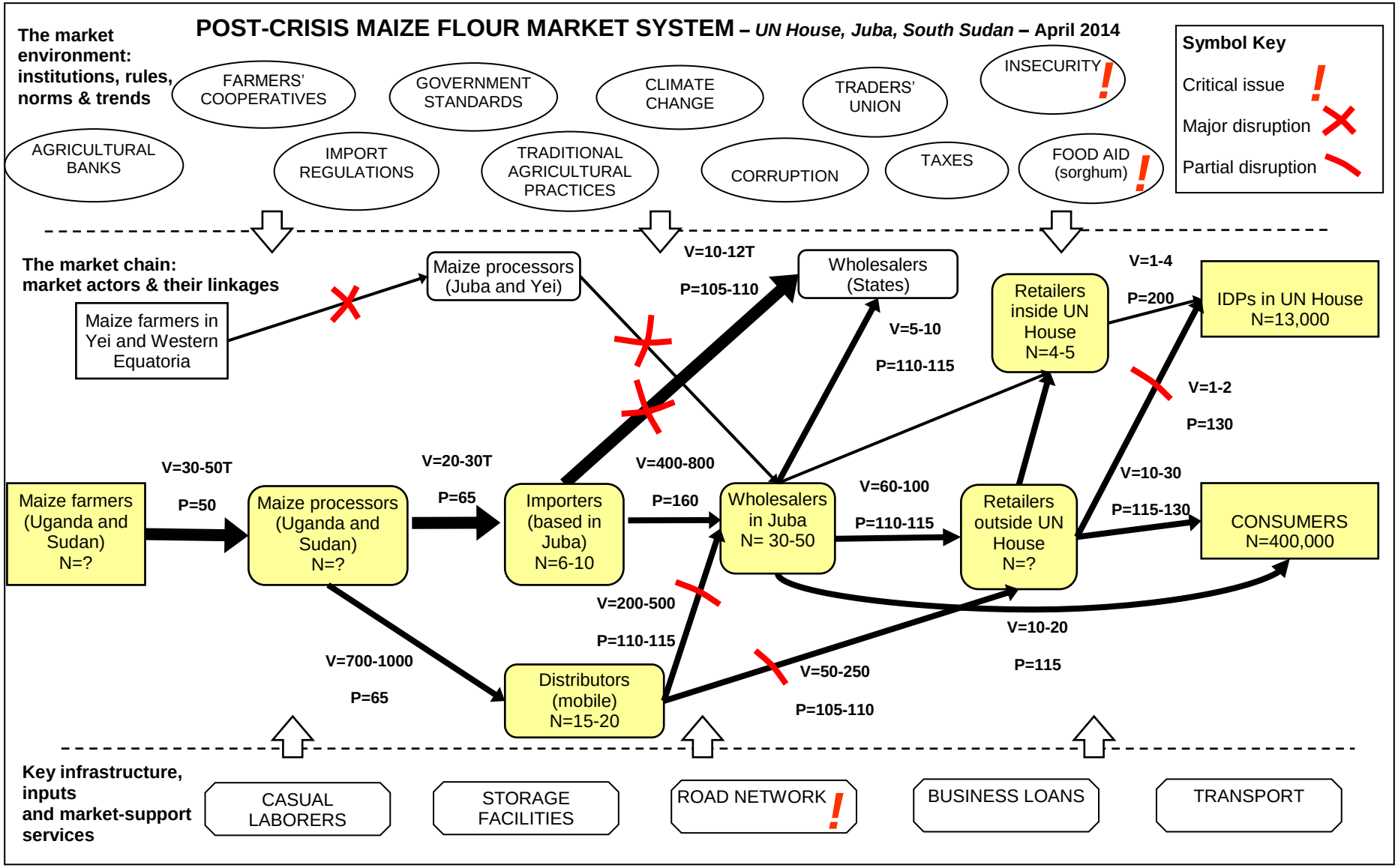
**Maize flour Market System in the crisis time**




Volumes are in 50 kg sacks per month except where otherwise indicated. One Ton (T) = 20 50 kg sacks

Prices are in South Sudanese Pounds/50 kg sack

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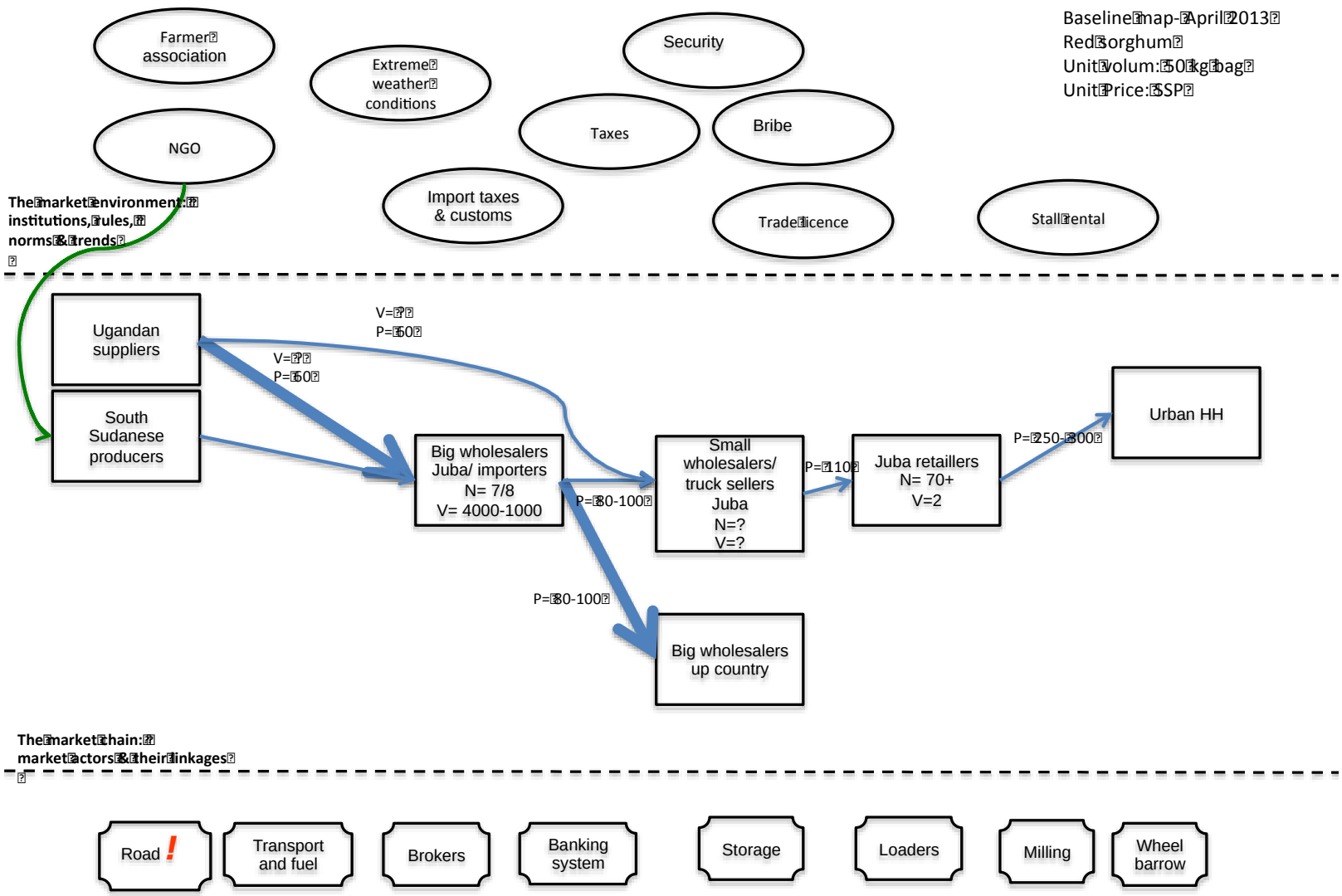
# Red sorghum Market System in reference time

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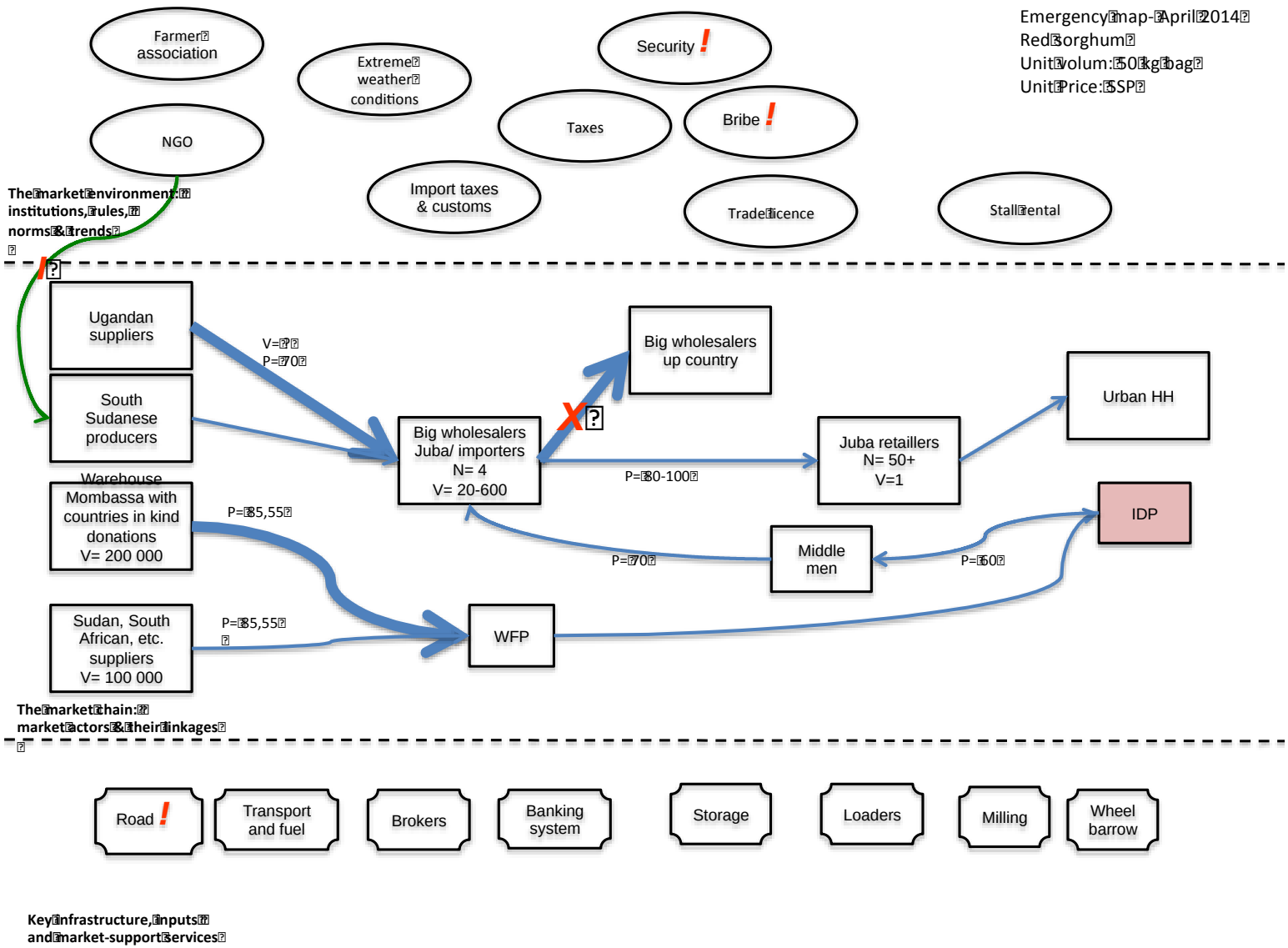
# Red sorghum Market System in crisis time

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**What has been the impact of December crisis on the red sorghum/maize flour market system in Juba?**

According to the EMMA team's best estimates, the market in Juba was supplying roughly 8,800 T/month of maize flour in April 2013. This was much more than sufficient to cover the needs of the Juba population. About 60% of the maize flour and 70% of the red sorghum moving through Juba were delivered up country, to the States, and the rest was purchased by the local population and local retailers.

Maize was typically imported *after* being processed into flour. The vast majority of maize flour and red sorghum moving through Juba market came from Uganda by road. A small portion of the maize flour and red sorghum entering the market came from the South Sudanese production hubs of Yei and Western Equatoria. The potential for agricultural production in South Sudan is huge. Half of the total 82 million hectares of agricultural land is suitable for agricultural production with the remaining half composed of marginal arable land, forests and wetlands. Yet currently only 4.5% of the available agricultural land is under cultivation[14]. Furthermore yields are low, with the average of all cereals generally below one ton per hectare. Production is consumed locally. As a result the cereal production in South Sudan was 761,000 MT in 2012 with the overall cereal deficit estimated at 371,000MT. This deficit is met by cereal import and humanitarian aid.

Since the closure of the border between Sudan and South Sudan in 2012, resulting in trade disruption with Sudan, South Sudan has intensified imports of food and non-food commodities from East Africa and especially, Uganda through Nimule and Ethiopia through Gambella. Juba market imports mostly come from Uganda. A group of 6-10 large importers based in Juba brought about 90% of the maize flour and red sorghum into the market from Uganda. Those importers are dealing with both red sorghum and maize flour.

The team did not gather enough information for this report to comment on the expandability of the maize flour or red sorghum market systems at their baseline capacities but it could be completed if WFP market assessment data is made available.

The crisis in South Sudan has severely impacted the maize flour and red sorghum market chains in Juba. Flows to the States have almost completely stopped, mostly because of insecurity along transport routes and at former delivery hubs. At the same time, demand for maize flour and red sorghum has plummeted in Juba and elsewhere because of the massive displacement of the population. Within Juba, the population has decreased by more than half since the crisis started, as people have fled to other part of the countries or abroad in Uganda and other neighbouring countries (Ethiopia, Kenya and Sudan). Because of the reduction in demand, the volume flowing through Juba market has dropped dramatically. If the large importers number has not changed after the crisis, some actors are dealing with half as much maize flour as they did prior to the crisis and ten times as less red sorghum.

Prices all along the maize market chain have dropped from 180 SSP/50 kg sack at the consumer level to 115-130 SSP/sack. As per the data collected, prices remained stable along the red sorghum market chain. This may seem surprising but can potentially be explained by the fact that prices remain stable from Uganda exporters (60 SSP in April 2013, 70 SSP in April 2014) where most of the sorghum comes from. In addition, the drop in demand from Juba consumers

[14] FAO Land Cover Database, 2010

resulted in a reduction in supply from the importers. As most of them were collecting sorghum from Uganda on a weekly basis, there was no major sorghum stock.

Within UN House itself, conditions are a bit different. Whereas many households in the camp historically consumed at least some maize flour, almost none are eating it today. This is undoubtedly because WFP is distributing food assistance in the form of sorghum, and so most people are simply eating that. Also, residents of the camp have difficulty accessing outside markets. Anyone venturing outside the camp, especially men and older children, faces serious security risks. Only women, who are less likely than men to be recognized as Nuer, visit outside market places. Further, very few people in the camp have any disposable income, and so few are able to buy anything even if they are able to leave UN House.

At the same time, some entrepreneurial camp residents have established small shops inside the camp, about 150 shops in total, which they stock through periodic trips to bigger market places in Juba. Because the demand for maize flour inside the camp is so low, few vendors (4-5 at the most) are supplying it; however, those who are selling it are doing so for quite an inflated price – 200 SSP/50 kg, about two-thirds more than it costs outside the camp. Clearly, these vendors are taking advantage of their market power for the few camp residents who can afford their product. Because there is no demand for sorghum inside the camp, as WFP is distributing sorghum in kind, there is no sorghum being sold inside the UN house camp, however some of the sorghum distributed in the camp is sold by the IDP to Juba traders. As this issue is quite sensitive, it has not been possible to gather information on the volume of trade this represents but sacks of aid sorghum have been observed by the EMMA team in the different visited market places (Konyo Konyo and Jebel).

**Is the current capacity of the sorghum/maize flour market systems sufficient to meet the demand of both Juba overall population and of WFP supply for Juba operations?**

Currently the market place inside the camp is not carrying any red sorghum and the current capacity of the maize flour inside market is quite low. It is supplying something like 10 50 kg sacks per month to the camp. While traders claimed that they could increase supply of either grain (sorghum and maize) if the demand warranted it, even if current supply (of maize flour) were to expand by a factor of ten, the supply would still represent less than 7% of the total need within the camp. The traders' ability to expand is limited by their lack of capital, the insecurity and unpredictability of their situations (meaning that they do not stock) and UN restrictions on shipments into the camp. While the camp authorities can manage to conduct security checks on 1-2 sacks of grain, larger volumes would pose a serious logistical hurdle.

Despite the decrease in flows, maize and red sorghum market systems in Juba itself remain well integrated, and they have high expandability. Most traders said that they could double their current volume within 1-2 weeks if demand was to increase, and it is possible that their expandability is even greater than this. Juba market has currently the expandability to meet the demand of Juba overall population and of WFP supply for Juba operation for two main reasons: the overall IDP population living in Juba represent less than 10% of Juba overall population and the maize and sorghum market systems were trading 60 to 70% more in April 2013 when Juba was supplying up-country market places.

Furthermore it is very likely that the Juba market systems could expand to meet the demand of Juba overall population, WFP supply for Juba operation and of the States if trade with up-country was to restart, as the overall IDP population living in Juba (and therefore of WFP supply

needs) represent less than 10% of Juba overall population.

**What are the anticipated constraints and risks that will affect the red sorghum/maize flour market systems in the coming 6 months?**

As the current situation in South Sudan is highly unpredictable, it is difficult to forecast what will happen over the rest of the year. This forecast will be based on a conservative scenario that sees a decrease in hostilities between the Government and the Opposition Forces with eruptions of tensions and occasional outbreaks of violence, especially in the areas around the rebel front in the eastern part of the country. Most of the IDPs currently living within UN House are expected to stay put over the long term, although there may be some minor migrations in and out. If trade routes inside the country are being secured, trade with the States will resume and volumes transiting through Juba market will increase by 60 to 70%.

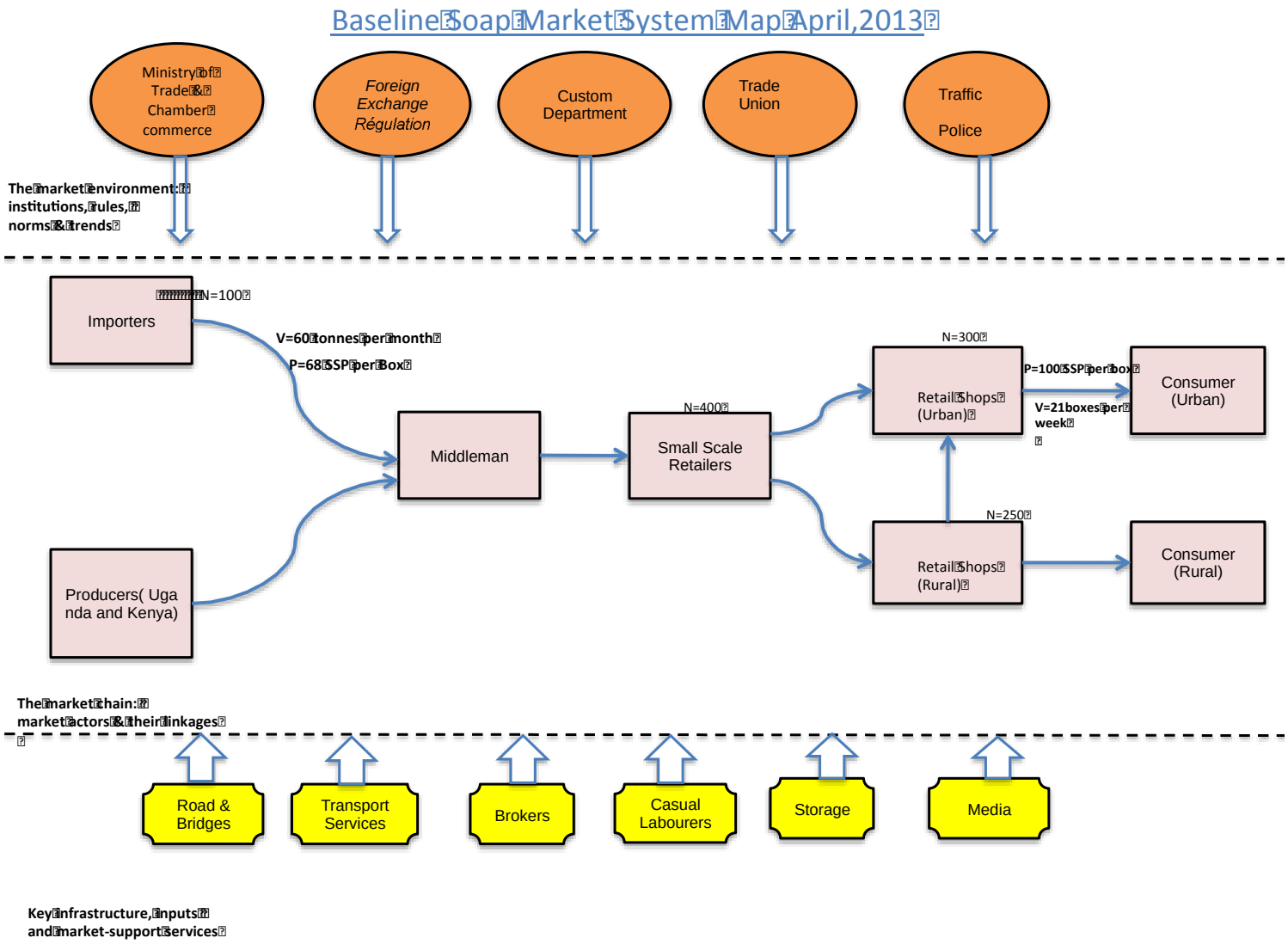
The 2014 agricultural season has been interrupted by the crisis, and maize and sorghum harvests within South Sudan will certainly be reduced. However, this will be unlikely to affect the Juba market much, as the population relies on imported maize flour and red sorghum, and the in-country production represents a tiny portion of the Juba's market (less than 5% according to Konyo Konyo trade union).

Flows and prices will probably remain lower than they were before the crisis, and in fact will remain similar to what they are now. Some market actors in Juba may leave for lack of profits, but it is expected that the ones that remain will simply increase their volume to cover any gaps. The Juba market should remain highly integrated with markets in Uganda provided that conditions along the road from Nimule remain relatively secure, therefore Nimule's road security condition is key to monitor.

If the food assistance within UN House is still being delivered in kind, with no cash being distributed to cover basic needs, the situation within the camp should remain much as it is now: with very little access to purchase power for the IDP living in the camp, a small market place inside the camp and some of the food aid being sold by the IDP outside the camp to cover their other needs. The inside market will remain small but intact, stifled by the residents' lack of purchasing power.

## 3. The soap market system

## Soap Market System in reference time

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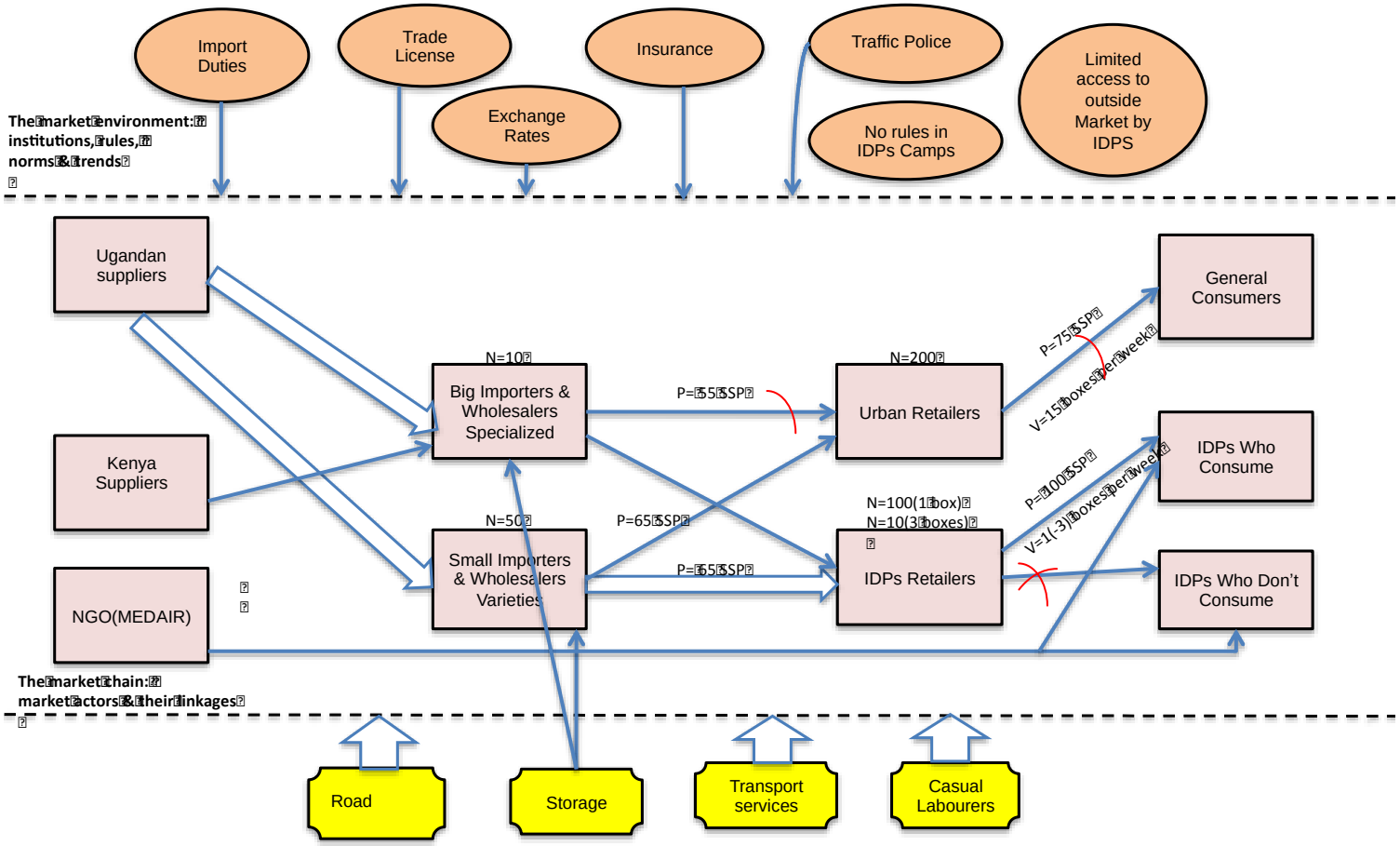
## Soap Market System in crisis time

### Emergency Soap Market System Map April,2014




Key infrastructure, inputs and market-support services

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**What has been the impact of December crisis on the soap market system in Juba?**

As per EMMA team's best estimates, the market in Juba was supplying roughly 60 T/month of soap in April 2013 which was enough to cover Juba market's demand. The vast majority of soap moving through Juba market came from Uganda by road.

The crisis in South Sudan has impacted the soap market chain in Juba and resulted in a drastic drop in demand to roughly 24 T/month due to displacement and loss of income for the affected population. The volume flowing through the market has dropped dramatically.

Inside the camp, several of the 150 shops are selling soap which they stock through periodic trips to bigger markets in Juba. Those shop are however selling for quite an inflated price at 100 SSP per box as opposed to 75 SSP per box in the market outside the camp. Clearly, these vendors are taking advantage of their market power for the few camp residents who can afford their product. The demand for soap inside the camp is quite low, displaced households have very little access to capital and rarely prioritise the purchase of soap with the little capital they can have (percentage of households inside the camp who buy soap should be looked into).

**Is the current capacity of the soap market system sufficient to meet the demand of both Juba overall population and of WFP supply for Juba operations?**

Despite the decrease in flows, the soap market system in Juba itself remains well integrated and has high expandability. Most traders said that they could double their current volume within 1-2 weeks if demand were to increase, and as for the maize and soap market system, it is possible that its expandability is even greater than this. Juba market would have the expandability to meet the demand of Juba overall population and of relief operation for the IDP living in Juba also because the overall IDP population living in Juba represent less than 10% of Juba overall population.

The current capacity of the soap market system inside the camp is low. It is supplying something like 80 boxes per month (420kg) to the camp. Traders claimed that they could increase supply if the demand was guaranteed but as for the maize market system, the expandability is limited by the traders lack of capital, the difficult access to Juba market, the insecurity and unpredictability of their situations (meaning that they do not stock) and UN restrictions on shipments into the. The EMMA team estimates that the inside market would however have the expandability to meet the demand of the IDP population if the demand was to increase.

**What are the anticipated constraints and risks that will affect the soap market system in the coming 6 months?**

Flows and prices will probably remain lower than they were before the crisis, and in fact will remain similar to what they are now. Some market actors in Juba may leave for lack of profits, but it is expected that the ones that remain will simply increase their volume to cover any gaps. The Juba market should remain highly integrated with markets in Uganda provided that conditions along the road from Nimule remain relatively secure.

If the relief within UN House does not change, the situation within the camp will remain much as it is now. The inside market will remain small, stifled by the residents' lack of purchasing power and lack of major expandability of the market.

## Section 6: Comparing the gap in needs with the market capacity

| Key market system | Findings | Implications for Oxfam's response |
|---|---|---|
| Maize | • There is a gap of 77,994 kg/month (1,560 50 kg sacks)<br>• There is offer of maize in the camp but very limited by low demand from IDP, difficult access, fear to stock and UN regulations.<br>• There is offer of maize outside the camp, limited by low demand from Juba population. But there is a high expandability (from Uganda's import), and the supply chain seems to be relatively reliable for the months ahead.<br>• There is demand for maize inside the camp strongly limited by purchasing power.<br>• There is demand for maize outside the camp strongly limited by purchasing power and interruption of trade with up-country.<br>• Outside the camp the limiting factor is demand not supply, the same apply to inside the camp (but to a lesser extent due to limited expandability of the inside market) | The response cannot rely on the internal camp market but it can rely on the Juba market to cover the need. |
| Sorghum | • There is no gap, rather a surplus of 77,994 kg/month (1,560 50 kg sacks)<br>• There is no offer of sorghum in the camp due to no demand from IDP, sorghum being distributed in kind.<br>• There is offer of sorghum outside the camp, limited by low demand from Juba population. But there is a high expandability (from Uganda's import), and the supply chain seems to be relatively reliable for the months ahead.<br>• There is no demand for sorghum inside the camp because sorghum is provided in-kind.<br>• There is demand for sorghum outside the camp strongly limited by purchasing power and interruption of trade with up-country.<br>• Outside the camp the limiting factor is demand not supply, the same apply to inside the camp (but to a | As there is a surplus, advocacy can be done to diversify the food basket to include maize.<br>The current response cannot rely on the internal camp market but it can rely on the Juba market to cover the current aid being distributed. |

| Key market system | Findings | Implications for Oxfam's response |
|---|---|---|
| | lesser extent due to limited expandability of the inside market) | |
| Soap | • There is a gap of 3360 kg;<br>• There is offer of soap in the camp, though limited by the low demand, difficult access and fear to stock<br>• There is a demand both inside and outside the camp, strongly limited by purchasing power<br>• There is expandability for both outside the camp and inside the camp markets.<br>• Both for outside and inside the camp the limiting factor is demand not supply. | The PHP response can rely on either the internal camp market (preferred option) or Juba market. |

## Section 7: CTP feasibility study

CTP can be a dignified and relevant way to deliver humanitarian aid if the context is appropriate and some conditions are fulfilled:

- Social acceptance of cash (within the community and by the authorities)
- An efficient payment mechanism accessible by all community members and safe for both the community and Oxfam team
- Functional and accessible markets

The feasibility study has been done as an extra step of the EMMA study over the course of 2 days on April 29th and 30th 2014 by Helene Juillard with the support of Emily Sloane and S.Gasim, covering CTP feasibility in the UN house.

### 1.Social acceptance of cash

In the assessed area the economy is monetised and people are used to handling cash. Acceptance of cash within the target group is high and people expressed preference for receiving support through CTP would they be given the option.

As per the four focus groups discussions held in UN House (2 with men and 2 with women) it appears that men take decisions on the allocation of available resources at household level. The women are in charge of the food budget and decide on the use of this budget once the allocation has been done by the men.

If CTP are being considered, the selection of the household member to give the cash/voucher to, will have to be done carefully, involving the community (both men and women). As mentioned by the CCCM Gender assessment report on IDP response at UNMISS UN House PoC published in 2013: "The challenges in connection with not being occupied inside the PoC were mentioned not only by men, male youth and the traditional leaders but also by young girls and boys (age 10-15). The men voiced that not being able to leave the PoC, to engage in livelihood activities and to cater for their families makes them feel helpless. During the day, men mainly gather to sit and talk and debate about the political developments. Without work and education, they have difficulties do distract themselves and keep their "minds busy". Sitting in groups and talk about the conflict is also something male youth (16-24) as well as boys (10-15) often do." Men having

lost their role of money earner may feel strongly against being totally deprived of this role would women solely be given the cash/voucher.

The Deputy Director of RRC for Juba State, the Acting Food Security Director within Global RRC and the Director for Aid coordination within the Ministry of Finance have been visited to assess their positions towards CTP. The three of them express no concern about using CTP and mention there was no specific legal restriction from the government side on using them.

In the assessed CoP, Oxfam is already using CTP through voucher modality to deliver some charcoal. There are no agencies using CTP in the UN House, relief is mostly delivered in kind.

## 2.Payment Mechanism

**Mobile money is not legal in South Sudan** and therefore, even if some small-scale mobile money transfers take place within the UN House, it cannot be considered as an option.

The main existing money transfer agents are the banks (like KCB) and the money transfer companies (Eden, ElPaso, Western Union for international transfer).

**Money transfer agencies are operational in Juba, but physical access is a major challenge.** Male IDPs and male youth (age 16-24) say it is impossible for them to leave the site and that they would most likely be arrested and killed if detected by police, army or even civilians with specific ethnic profile. The women (age group 25-45) are reluctant to leave the PoC site fearing for their safety, but often take the risks as they say it is impossible for men to leave the site[15]. Some women therefore access outside money transfer companies to collect money sent by relatives abroad through international money transfers but it is not possible to rely on this access to implement a CTP scheme at scale. In addition, women said that when trying to collect money from non-international money transfers (i.e. sent by relatives from another part of the country) if recognised as Nuer, the money could be confiscated from them[16].

**Inside the UN House itself there is a KCB branch but the IDPs are not entitled to access it** and it is meant to deliver services only to the UN staff. There seems to be no space for negotiation on changing access by IDP to the KCB branch inside the UN House[17].

The only option in terms of money transfer companies has been to assess the possibility for them to enter the UN house and set up a cash counter inside the CoPs. Eden money transfer company has been met and the attached questionnaire filled (see Annexe 5 for the questionnaire used and Annexe 6 for the transcription of Eden answers). El Paso and KCB have been spoken to over the phone but further assessment is needed.

Money transfer companies are **willing to partner with OGB** on transferring cash physically within the UN house. They claim they have the capacity to cover cash transfer to 2,100 HH (13,000 persons) on a monthly basis and mentioned about having the capacity to serve 200 to 400 clients a day. However this will have to be crosschecked as Eden for example mentioned that the 2,100 HH could be registered in their database within 24h. This is either a very efficient registration process or most likely they have difficulty to apprehend the volume it will represent. In addition, around 6,000 heads of household are currently officially registered within UN house, for 13,000 persons. This average size of 2,1 persons/HH is artificial and the

[15] CCCM Gender assessment report on IDP response at UNMISS UN House PoC, 2013
[16] FGD, CTP/EMMA study, OGB, April 2014
[17] Discussion with UNMISS Head of Operation for UN House

result of a poor registration process. Because the registration process is sensitive, Oxfam country team suggested that the cash grant should be distributed to each 6,000 heads of household with tailored amount to their specific household members' numbers. If the grant has to be given to the 6,000 smaller HH currently registered with non-standard amount, **the money transfer company capacity will most likely be extremely stretched** as they have never done it in the past on such a large scale. One of the transfer company met (Eden) had an experience with a UK NGO, but at the time of the interview, they could not remember which one neither its scale and were supposed to send further details.

The **transfer charges are between 3 to 5%** with all the costs being bore by the money sender. This charge is within a very acceptable range (usually agency consider transfer charges to be between 2 to 7%[18]).

Money transfer agents use armed escort when moving around with money, this causes a major issue as it is very unlikely that the UN house management will let the agent's escort enters the camps[19]. The money transfer agents met were not willing either to leave their escort at the UN house gate. The possibility for the money transfer agents to leave their escort at the gate and for this escort to be replaced by a UN escort could be discussed but seems very heavy and challenging to implement as no one from UN or money transfer company was favouring it. This may also present some security and ethical challenges for NGO.

Accessing money transfer system also normally requires having a valid ID, especially with the banks. **Most of the IDPs have lost their ID documents.** Alternatives apparently exist with money transfer companies and Eden mentioned a valid mobile number could suffice but not with the banks for which having a national ID is a pre-requisite to be able to access their services.

Looking at traders access, to assess feasibility of using voucher modality, the access by the IDP to the outside traders is as restricted as it is for them to access money transfer agents. In terms of access for the outside traders to the UN House the question has been raised with the camp management (UNMISS Head of Operation for UN House and ACTED Camp coordinator) and needs to be followed up. It could be allowed but in any case the packaging would have to be done outside; if the traders try to get in with 50kg bag of sorghum or maize, all the bags will be open and searched which will make it impossible in terms of delivery duration. If the traders enter with smaller bags (i.e. quantity for one HH) bags will not be searched, as there will be less risk for the bags to contain weapons[20]. Smaller bags may raise questions of acceptance by the IDPs and if this modality is selected, Oxfam should consider a way to make sure the recipients will trust the quantities in the bags (free access scales, etc.).

## 4. Market

Market functionality is assessed in detail above, both for Juba market and for the one inside the camp.

[18] Oxfam Standard Operating Procedures, Working with Cash and Markets.
[19] ibid
[20] UNMISS Head of Operation for UN House

## Section 8: Main recommendations and conclusions

**Response logic**

Oxfam's response in UN House for increased food security and better hygiene should be market aware. The soap, red sorghum and maize flour market chains in Juba have been affected by the December 2013 crisis mostly due to the decreased in demand. There are few supply issues as most of the goods are imported from Uganda and the roads between Uganda and Juba are functional. Therefore Oxfam response could rely on Juba market and Oxfam could advocate with other actors like WFP for more local procurements.

**Response options**

Based on the above, it is not recommended to use cash grants, mostly because there is no payment agent accessible in a safe manner to the IDP. Vouchers both for commodities and value could be considered relying on both internal traders for small-scale scheme and external traders for larger scale ones (i.e. for cereals). Before deciding for any type of CTP, it is key to coordinate with the UNMISS and the camp coordination to confirm feasibility and buy-in of the key stakeholders.

The study aimed at calculating the costs and value for money per metric ton of the different commodities for each considered modalities (in-kind, cash and voucher), however considering the short amount of time, this has not been possible.

**Response activities**

| Activities | Advantages | Disadvantages | Feasibility |
|---|---|---|---|
| Advocacy for integrating maize flour into the food aid distributed, and procuring both the maize and sorghum through Juba vendors. | Increasing numbers of IDPs would have access to their preferred staple food<br>Profits would increase for some large-scale suppliers within the local maize flour and red sorghum markets | Food rations would still not be tailored to individual households' preferences; some trading and/or selling of food aid would likely still occur | High - WFP is apparently eager to save their supplies of sorghum for other parts of the country. Also, it is clear that the Juba market could supply enough |
| Cereal voucher distribution for cereals<br>BNFs could choose between sorghum and maize flour<br>Work with large wholesaler to organize a market place/warehouse inside the camp | Individual IDP households would have their choice of staple foods<br>Profits would increase for some large-scale suppliers within the local maize flour market system. | Traders' willingness to participate in the program could change quickly if the security situation were to worsen | Low-moderate - The security checks required by the UN to allow the transport of large, private stocks of cereals into the camp would be cumbersome and would likely deter would-be vendors. Follow up with Peace about wholesaler/transfer agents access to the UN house. Assess the possibility to start with portion of in |

| | | | |
|---|---|---|---|
| | | | kind (e.g. sorghum) and a portion through voucher (maize) |
| Commodity voucher for soap distribution. | Individual IDP household would have gain access to soap in a dignified way, with the possibility to choose.<br>Profits would increase for some of the vendors within the UN House market place, and the increased cash flow could provide opportunities for other IDPs to pursue income-generating activities as well. | If not integrated in a broader PHP response, the impact of the soap distribution will likely be smaller.<br>Additional supply trips to Juba for market vendors inside camp could increase the security risks that they face | Moderate-High: Oxfam already has some experiences about commodity voucher for charcoal. This could be used for soap voucher, although relying on traders inside the camp. |
| Unconditional cash grants for all food needs<br>Vendors within the camp would be expected to increase supply to meet the demand of the camp residents | IDPs within the camp would have purchasing power and the freedom to spend their cash on their unique wants and needs<br>Profits would increase for most/all of the vendors within the UN House market, and the increased cash flow could provide opportunities for other IDPs to pursue income-generating activities as well<br>The program would likely have a positive effect on beneficiaries' morale and could ease tensions within the camp | Tensions and crime within the camp could increase, especially if not all camp residents are targeted for assistance<br>Additional supply trips to Juba for market vendors inside camp could increase the security risks that they face<br>The markets within the camp might not have the capacity to supply sufficient food for the entire camp population<br>It may not be possible to identify an appropriate, accessible, safe and feasible means of cash transfer | Low – it is unlikely that vendors within the camp could supply all basic needs for camp residents, especially large volumes of staple grains. Also, there does not seem to be a feasible means to efficiently transfer cash to the camp population. |
| Value voucher as a top up for basic needs | IDPs within the camp would have a small purchasing power and the freedom to prioritise | Additional supply trips to Juba for market vendors inside camp could increase the | High-Moderate<br>Before implementing any value voucher inside the camp, |

| | | | |
|---|---|---|---|
| | some basic expenses. Profits would increase for most/all of the vendors within the UN House market, and the increased cash flow could provide opportunities for other IDPs to pursue income-generating activities as well.<br>The program would likely have a positive effect on beneficiaries' morale and could ease tensions within the camp. | security risks that they face | measurement of traders' cash absorption capacity should be refined. |
| Conduct market analysis in other Oxfam areas | Area could include Upper Nile (Malakal and Melut) and Jonglei (Waat and Lankien); liaise with Plan (for Melut) and FAR (for Akobo).<br>Oxfam would gain a better understanding of market chains in this area and could design better response option. | Team may not have the internal capacity to do so. | High |

**Response recommendations**

| | |
|---|---|
| **Response objective:** | Contributing to saving lives and minimizing the negative consequences of the current crisis on the food security and livelihoods of affected communities UN House |
| **Outcome of the response** | Providing food security and livelihoods support to 13000 people affected by the crisis in UN House, Juba, South Sudan |
| **Activities for EFSL component** | |
| 1. Advocate to WFP for local procurement of food aid for UN House and for the integration of maize flour into food rations | Coordinating with other agencies working within UN House to confirm WFP's willingness to procure food aid locally and to develop an action plan to put it in place quickly.<br>Explore the research.<br>Follow up with UNMISS to assess the feasibility to use commodity voucher for a portion of the food ration. |

| | |
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| 2. Feasibility study to see if the market inside UN House could cover the rest of the WFP's food aid package (legumes, oil and salt) | The EMMA focused on maize flour and sorghum but did not examine the market chains or the feasibility of the other items in the WFP's food aid package. Providing vouchers to camp residents to procure these items within UN House could be an option, but it should be more thoroughly explored by Oxfam staff before going ahead. |
| 3. Value voucher distribution to IDPs within UN House for basic, non-food needs | Determine a targeting system and levels of assistance per vulnerability level. Current WFP registration records are problematic, as in many cases more than one individual per household is registered to receive assistance. However, it may be necessary to simply use the existing registration data rather than to revisit it. Blanket coverage is recommended in order to reduce the risk of tension or crime among residents; however, it may be worth providing extremely vulnerable households with top-up vouchers. The Oxfam team would have to identify vulnerability criteria and appropriate value voucher amounts. |
| | Identify vendors within the camp who are willing and able to participate in the voucher program. Set up operational contracts with them.<br><br>Develop a distribution plan for vouchers. It may make sense to distribute two months' of vouchers at once, given the large number of beneficiaries. Vouchers could be designated for a specific month (or time period) in order to facilitate this. |
| 4. Market monitoring | Monitoring of key market indicators (key commodities price, number of importers, volume of trade, security condition of the Nimule road and of the main up-country trading routes) to follow the context and adjust the response option and delivery modality accordingly. This further monitoring could also be an opportunity to fill the gaps highlighted in this report. |
| 5. Replicating market analysis in other parts of the country | Implement a similar exercise in others Oxfam intervention area, in partnership with other agencies that expressed interest during the Food Security Cluster. This could go along with advocacy for transfer mechanisms, for cash to be feasible in other areas of country (where the PoC rules do not apply) |

NB : The activity related to soap distribution should be integrated into Oxfam broader PHP response and the EMMA team did not have enough information to draft a PHP recommended response.

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# Annexes

## 1.The EMMA ten steps

The EMMA process can be divided into ten steps, covering the general sequence of activities. However, EMMA is also an iterative process. In practice, activities in different steps will overlap, and we may return to particular steps repeatedly, as our analysis of each market system is revised. This continues until a 'good-enough' final picture is achieved.

| | |
|---|---|
| 1. Essential preparation | Do background research and in-country briefings; agency mandate, terms of reference and practicalities; identify target population and their priority needs |
| 2. Market Selection | Select the most critical market systems for EMMA to study, selection using various specific criteria; and then identify the key analytical questions that will guide the investigation of each system |
| 3. Preliminary analysis | Draft initial provisional household profiles, seasonal analysis calendars, baseline and emergency-affected maps of the market system; and then identify key informants and useful leads for fieldwork |
| 4. Fieldwork preparation | Fieldwork Agree and set the fieldwork agenda; devise the preparation questionnaires, interview plans and information recording formats needed for EMMA interviews and other fieldwork |
| 5. Fieldwork activities | Conduct fieldwork activities: interviews and other informationactivities gathering; this section includes guidance on interview methods and tips relating to different categories of informant. |
| 6. Mapping the market | Mapping Produce final versions of baseline and emergency market the market maps, as well as seasonal calendars and household profiles that describe the situation, and will inform the three 'analytical' steps that follow. |
| 7. Gap Analysis | Finalize the gap analysis strand: use household profiles, analysis information on priority needs, shortfalls and access constraints in order to finally estimate the total gap which needs to be addressed |
| 8. Market Analysis | Complete the market analysis strand: use market maps and analysis data to analyse availability, conduct, performance and thus estimate the capacity of the market system to meet the gap. |
| 9. Response Analysis | Response Finish the response analysis strand: make reasoned analysis recommendations, based on the market system logic, feasibility, timing and risks of different options, including cash, in-kind relief or other market support |
| 10. Communicate results | Consult with colleagues, and communicate EMMA's results to wider audiences (donors, agencies); using concise briefings and eye-catching map-based presentations and reports |

## 2.Market analysis Terms of reference

| EMMA - South Sudan<br>Terms of Reference | |
|---|---|
| **Dates** | On the job training (6 days): 22 to 27th of April 2014; continuation of assessment and analysis (7 days): 28th of April to 4th of May. |
| **Agencies** | Oxfam GB Lead/Coordination and other organisations – WFP, Mercy Corps, Save the Children, ACF, etc... (see list of participants) |

**Background and Introduction**

A political crisis within the Government of South Sudan (GoSS) which began on 15th December 2013 has spilled over into armed conflict based on ethnic divisions. This crisis resulted in significant population displacement as people have fled their homes to escape fighting. Early February 2014, the UN estimated that more than 450,000 people have been displaced including 400,000 internally displaced people and close to 50,000 refugees in neighbouring countries. Numbers are still growing by the day. In areas of significant conflict, markets have been demolished such as Malakal, Bor and Bentiu forcing people to stay in UNMISS bases looking for protection and access food and non food items that are no longer available. Populations have lost their livelihoods and personal effects also hampering their ability to return home. The situation remains widely unpredictable and although peace talks are taking place in Addis Ababa even the most optimistic predictions suggest that the crisis will continue for some time and that it is unlikely that people will be able/willing to return to their homes in the near future. Like most crisis, this conflict is hitting the poorest and most vulnerable people the hardest.

Oxfam works in an impartial and neutral manner to offer assistance to those who are most in need and who are in places that are less accessible to the humanitarian community as a whole but where Oxfam has a distinctive competence. Through its humanitarian response Oxfam's objective is to reduce morbidity and mortality by delivering humanitarian assistance in WASH and food security to up to 15% of those affected by the current conflict or around 200-250,000 whichever number is greater. Oxfam also aims at influencing decision-makers to ensure adequate quantity and quality of humanitarian assistance. This includes influencing the humanitarian community in adopting and expanding Cash and market based programming where feasible and relevant, and in carrying out livelihood support as part of relief operation and Protection of Civilians (POC).
Oxfam is addressing food security needs through commodity vouchers in Juba (in complement to food aid ensured by other agencies) and food aid in Awerial. Oxfam intends to explore alternative to pure food aid in its different areas of interventions and is therefore looking at implementing a market analysis to inform its program design.

**EMMA GOAL:**
To assess 1 to 3 relevant critical market systems in key areas of South Sudan in order to inform appropriate program design and targeting, including the feasibility and appropriateness of cash transfers (cash and / or vouchers, market support options) as a means to support access to food & livelihoods security for displaced/affected families.

**EMMA Objectives:**
- To consolidate existing information on market systems for selected critical markets;
- To determine the current state of the market for selected critical commodities / services and identify critical factors affecting supply and capacity to respond to demand- in selected areas; (this will imply creating market baselines for selected critical market systems items to inform response analysis);
- To identify through a rapid market analysis, the most appropriate modalities for meeting

food and livelihood security needs (cash/in-kind/market support/advocacy) in selected areas; and to establish trader willingness and capacity to work with Oxfam/organisations for possible food security and livelihoods related cash & voucher programmes;

- To recommend market monitoring indicators and approach to ensure the update of the market analysis as the situation evolves;
- Strengthen the South Sudan response team's capacity to conduct market analysis and to use it for response analysis.

**Outcomes:**

- Oxfam and partner organisation staff have a better understanding of market analysis as an essential input to response analysis and are able to apply the analysis to project design (CTP and /or in-kind)
- Baseline and emergency market analysis are conducted to inform an appropriate response design for food security and livelihoods needs.
- Innovative programming is proposed, combining different types of direct and indirect interventions as appropriate.
- The market analysis is based on and updates & complements existing information and knowledge on the critical market systems

**Outputs of the Training and EMMA assessment:**

- **Consolidated report of existing market information** for selected critical market systems (this will take the form of a summary, trade flow maps and balance sheets); this will not be an exhaustive compilation but will consolidate the essential information that will serve as a basis for the EMMA. This will include trade flow maps, existing balance sheets, projected balance sheets, understanding of regional trade flows and implications on S Sudan capacity to attract required food quantities.
- **EMMA reports** for each commodity selected: each report will have an analysis of the market system (baseline/reference and emergency maps) and response recommendations and include an executive summary of key findings and recommendations (including market maps). They/It will include a proposed monitoring system and indicators – complementary to the FSC assessment and monitoring strategy.
- **Activity report:** summary of the undertaken activities, of skills gained by the participants and of the evaluation of the exercise by the participants. This report will be 15 pages maximum and the template will be provided by Oxfam.

**Geographical Area**

- Juba camps and Juba (first week and second week)
- Oxfam operational areas in Jonglei (second week)

**Critical Market for Analysis (to be confirmed by participants team)**

- Cereals (sorghum and maize flour); potentially a third one in Juba;
- Critical markets for Jonglei operational areas to be determined.

**Key analytical questions (to be finalised with participants and with desk based review data):**

- What are the most appropriate modalities to address basic needs in the camps (cash, in-kind)?
- Are cash vouchers or even cash grants relevant and feasible in the camps? Is supply in Juba and in Juba camps sufficient and appropriate to allow increase of the portion of cash-transfers in the assistance provided to displaced populations? If yes up to which extent and how?
- Are traders and other service providers ready to deliver cash transfers?
- What are target groups preferences?

- What is the situation of the markets in Jonglei operational areas and how are they supplied (in 'normal' times, today and in future depending on different factors)?
- Is supply in those areas sufficient and appropriate to allow a portion of the assistance provided to displaced populations to be cash transfers? If yes up to which extent and how?
- Are traders and other service providers ready to deliver cash transfers in those areas?
- What market indicators shall we follow to monitor the key changes in markets and measure the feasibility and relevance of cash transfers (in part or full) in different areas?
- What key elements shall we consider if we want to replicate such exercise in other parts of the country?

**Team:**

- 1 facilitator + 1 co- facilitator, 26 participants in week 1; organised in 3 teams (1 per critical market)
- 1 facilitator + 1 co-facilitator , xx participants in week 2

**Total 28 persons**

Team members will comprise Oxfam staff, plus participants from other interested agencies.

**Duration of the Assessment and Working Hours:**

- Practical training in first week = 6 days including practical;
- Assessment and analysis in week 2: 7 days including data collection and travel;
- Participants will be required to take part in markets mapping and in data collection;
- Participants need to be ready for long working hours and should attend the whole duration of the exercise (6 days if only attending the practical training; 13 days if attending the whole exercise).

## 3.Participants list

**Participant list EMMA training Juba-**
**April 22- 28 2014**

| | | | | |
|---|---|---|---|---|
| Emily Henderson | Oxfam | Market Specialist | | EHenderson@oxfam.org.uk |
| **Group 1** | **Organisation** | **Position** | **Phone number** | **Email address** |
| Emily Sloane | Oxfam | Team Leader | 0955107780 | ESloane@oxfam.org.uk |
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| Gwolo Charles | PCO | Liaison Officer | 0955969284 | gwoloc@gmail.com |
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| **Group 2** | **Organisation** | **Position** | **Phone number** | **Email address** |
| Helene Juillard | Oxfam | Team Leader | 0955107840 | |
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| Nyarakajo Joseph | FEWSNET | FSM | 0926586895 | nyarakajojoseph@yahoo.com |
| Pal Yian Beaeh | Mile Hope | Senior Supervisor | 0954939141 | |

| | | | | |
|---|---|---|---|---|
| Joseph Musibulo Simiyu | HERYS | Programme Coordinator | 0955200797 | simiyu.henry@gmail.com |
| **Group 3** | **Organisation** | **Position** | **Phone number** | **Email address** |
| Florence Modong | Oxfam | EFSL officer | 0955835881 | FModong@Oxfam.org.uk |
| Salome Lukorito | CADA | Programme Officer | 0954441215 | skhatundi@yahoo.com |
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| Joseph Malish | ASTAD | Project Coordinator | | |
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| Memendasuk Daniel Gonda | PLAN | Field Monitor | 0954136043 | karimdan5@gmail.com |
| Deng Jok Awol | ASCDA | Field Officer | 0955117279 | |

## 4. Trader maize sorghum questionnaire

**EMMA South Sudan – April 2014** **Data Recording Sheet**

Date: _____ Enumerator(s): _____

**Introduction**: *Present the EMMA study. Its objective is to inform the design of humanitarian interventions, taking into consideration the way markets function.*

*Specify that we will share the findings with them once the study is completed. Tell them that we shall gather data for the maize and sorghum markets, as we need to understand their characteristics as well as how the ongoing crisis has affected them.*

| **Critical market items: MAIZE SORGHUM** | **Business location:** | **Type of actor:** |
|---|---|---|
| **GENERAL CHARACTERISTICS** | | |
| **1. What goods do you sell?** | | |
| **QUESTION** | **BASELINE *(last year at the same time of the year –*** | **TODAY** |

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| | *only complete if the trader was actively working in the same market last year at this time)* | | | |
|---|---|---|---|---|
| | **Maize** | **Sorghum** | **Maize** | **Sorghum** |
| **2. Were you trading in this market a year ago?**<br>**If so, were you selling maize/sorghum then?** | | | | |
| **3. What type of maize/sorghum do you sell? (imported, local, variety)** | | | | |
| **VOLUMES AND FLOWS** | | | | |
| **4. Where does the maize/sorghum that you sell come from?**<br>**Where do you get it?**<br>**Do you use intermediaries?** | | | | |
| **QUESTION** | **BASELINE** *(last year at the same time of the year – only complete if the trader was actively working in the same market last year at this time)* | | **TODAY** | |
| | **Maize** | **Sorghum** | **Maize** | **Sorghum** |
| **5. How often do you procure it, and how much do you procure each time?** | | | | |
| **6. When during the year do you sell IMPORTED** | | | | |

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|---|---|---|---|---|
| **maize/sorghum?**<br>**What are the months when it is in high demand? Low demand?** | | | | |
| **7. When during the year do you sell LOCAL maize/sorghum?**<br>**What are the months when it is in high demand? Low demand?** | | | | |
| **8. How much IMPORTED maize/sorghum do you sell per month in the high season? In the low season?** | | | | |
| **9. How much LOCAL maize/sorghum do you sell per month in the high season? In the low season?** | | | | |
| **10. How many people selling similar products are there in this market?** | | | | |
| **QUESTION** | **BASELINE *(last year at the same time of the year – only complete if the trader was actively working in the same market last year at this time)*** | | **TODAY** | |
| | **Maize** | **Sorghum** | **Maize** | **Sorghum** |

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| | | | | |
|---|---|---|---|---|
| To whom do you sell the maize/sorghum? Type of buyer? Where do they live?<br>Under which conditions do you make sales (e.g., cash only, trade, on credit)?<br>Average number of buyers per week? | | | | |
| 11. How are the prices set? How do you find the competition in this market (e.g., stiff, relaxed, cartel)? | | | | |
| 12. In which unit do you procure maize/sorghum?<br>In which unit do you sell? | | | | |
| **CONSTRAINTS AND RESPONSE CAPACITY** | | | | |
| | **Maize** | | **Sorghum** | |
| 13. What are the main constraints that you normally meet in trade? (Note differences between | | | | |

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| | | |
|---|---|---|
| **the high and low seasons.)** | | |
| **QUESTION** | **Maize** | **Sorghum** |
| **14. 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…)?** | | |
| **15. Has trade changed for you due to the conflict (more / less demand, change in prices of goods or services, change in rules…) ?** | | |
| **16. What have you done to cope with those changes ?** | | |
| **17. In particular, how has DEMAND behaved with the displacements after the crisis ? (increase, decrease, no change to date) ? Do you manage to answer to the present maize/sorghum** | | |

| | | |
|---|---|---|
| **demand? If not, what is the demand not covered?** | | |
| **18. What has changed on the market chain due to the displacements and crisis ? (number of actors ? prices of maize/sorghum ? Supply size ? demand size? Prices or conditions? services and inputs ? rules and regulations ?** | | |
| **19. How have other actors of the chain adapted to the situation ? Has anyone left the market?** | | |
| **20. If greater demand in ther emergency zone were guaranteed, to what extent would you be able to increase your supply volume ?**<br>**How long would it take to scale up your supply?** | | |
| **21. Where would you find** | | |

| | | | | |
|---|---|---|---|---|
| extra supply? | | | | |
| 22. What could limit you in increasing your supply? (for example, access to credit, roads conditions / transport…) | | | | |
| **PRICES AND TRANSACTION COSTS** | | | | |
| QUESTION | BASELINE *(last year at the same time of the year – only complete if the trader was actively working in the same market last year at this time)* | | TODAY | |
| | Maize | Sorghum | Maize | Sorghum |
| 23. How much do you buy maize/sorghum for in the high and low seasons?<br>How much do you sell it for in the high and low seasons? | | | | |
| 24. What is the cost of labour to load / unload maize/sorghum (is there a seasonality?) | | | | |
| 25. What type of transport do you use to procure the maize/sorghum that you sell? | | | | |

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|---|---|---|---|---|
| **What is the cost of transport per unit per season?** | | | | |
| **FORECASTING** | | | | |
| | **MAIZE** | | **SORGHUM** | |
| **26. How do you think the maize/sorghum market will change in the next six months? (in terms of prices, availability…)**<br><br>**What particular risks or challenges might arise that would impact the markets?** | | | | |
| **MODALITY OF INTERVENTIONS** | | | | |
| **27. Do you sell, or do you see others selling, food aid in the market?**<br>**Is there a difference in quality and price between the food aid and the products in the local market ?** | | | | |
| **28. How do you perceive the food aid that is taking place?**<br>**Does this represent a competition for you or** | | | | |

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|---|---|
| other vendors in the market?<br>If food aid were discontinued, what would the impact on the market be? | |
| 29. Do you know about voucher programs? Cash transfers?<br>What do you think about giving IDPs vouchers or cash instead of food aid?<br>Could these types of programs have any benefit for you?<br>Would you be interested in participating in a voucher program?<br>Do you have any concerns about these types of programs? | |
| **FINAL QUESTIONS** | |
| 30. How much do you earn from sales of ALL products on a typical day? | |
| 31. What is the approximate value of all of the stock that you | |

| | |
|---|---|
| **have now?** | |

## 5.Trader soap questionnaire

**EMMA South Sudan– April 2014** **Data Recording Sheet**

Date: _____ Enumerator(s): _____

**Introduction**: *Present the EMMA study. Its objective is to inform the design of humanitarian interventions, taking into consideration the way markets function.*

*Specify that we will share the findings with them once the study is completed. Tell them that we shall gather data for the soap market, as we need to understand its characteristics as well as how the ongoing crisis has affected it.*

| **Critical market items: SOAP** | **Business location:** | **Type of actor:** |
|---|---|---|
| **GENERAL CHARACTERISTICS** | | |
| **1. What goods do you sell?** | | |
| **2. Were you trading in this market a year ago? If so, were you selling soap then?** | | |
| **3. What type of soap do you sell? (imported, local, variety)** | | |
| **VOLUMES AND FLOWS** | | |
| **QUESTION** | **BASELINE *(last year at the same time of the year – only complete if the trader was actively working in the same market last year at this time)*** | **TODAY** |
| **4. Where does the soap that you sell come** | | |

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|---|---|---|
| from?<br>Where do you get it?<br>Do you use intermediaries? | | |
| 5. How often do you procure it, and how much do you procure each time | | |
| QUESTION | BASELINE *(last year at the same time of the year – only complete if the trader was actively working in the same market last year at this time)* | TODAY |
| 6. When during the year do you sell soap? What are the months when it is in high demand? Low demand? Is demand different at different times of year for different types of soap? | | |
| 7. How much soap do you sell per month in the high season? In the low season? | | |
| 8. How many people selling similar products are there in this market? | | |
| 9. To whom do you sell | | |

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| | | |
|---|---|---|
| the soap? Type of buyer? Where do they live?<br>Under which conditions do you make sales (e.g., cash only, trade, on credit)?<br>10. Average number of buyers per week? | | |
| 11. How are the prices set? How do you find the competition in this market (e.g., stiff, relaxed, cartel)? | | |
| QUESTION | BASELINE *(last year at the same time of the year – only complete if the trader was actively working in the same market last year at this time)* | TODAY |
| 12. In which unit do you procure soap?<br>In which unit do you sell? | | |
| CONSTRAINTS AND RESPONSE CAPACITY | | |
| 13. What are the main constraints that you normally meet in trade? (Note differences between the high and low | | |

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| | |
|---|---|
| **seasons.)** | |
| **14. 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…)?** | |
| **15. Has trade changed for you due to the crisis and displacement (more / less demand, change in prices of goods or services, change in rules…) ?** | |
| **16. What have you done to cope with those changes ?** | |
| **17. In particular, how has DEMAND behaved with the crisis and displacement ? (increase, decrease, no change to date) ? Do you manage to answer to the present maize/sorghum demand? If not, what is the demand not covered?** | |

| | |
|---|---|
| **18. What has changed on the market chain due to the crisis and displacement ? (number of actors ? prices of soap ? Supply size ? demand size? Prices/ conditions? Services/ inputs ? rules/ regulations ?** | |
| **19. How have other actors of the chain adapted to the situation ? Has anyone left the market?** | |
| **20. If greater demand in ther emergency zone were guaranteed, to what extent would you be able to increase your supply volume ?**<br>**How long would it take to scale up your supply?** | |
| **21. Where would you find extra supply?** | |
| **22. What could limit you in increasing your supply? (for example, access to credit, roads conditions** | |

| | | |
|---|---|---|
| / transport…) | | |
| **PRICES AND TRANSACTION COSTS** | | |
| **QUESTION** | **BASELINE** ***(last year at the same time of the year – only complete if the trader was actively working in the same market last year at this time)*** | **TODAY** |
| **23. How much do you buy soap for in the high and low seasons?**<br>**How much do you sell it for in the high and low seasons?** | | |
| **24. What is the cost of labour to load / unload soap (is there a seasonality?)** | | |
| **25. What type of transport do you use to procure the soap that you sell?**<br>**What is the cost of transport per unit per season?** | | |
| **FORECASTING** | | |
| **26. How do you think the soap market will change in the next six months? (in terms of prices, availability…)**<br>**What particular risks** | | |

| | | |
|---|---|---|
| **or challenges might arise that would impact the markets?** | | |
| **MODALITY OF INTERVENTIONS** | | |
| **27. Do you sell, or do you see others selling, hygiene items such as soap that are provided by NGOs in the market?**<br>**Is there a difference in quality and price between the hygiene items given by NGOs and the products in the local market ?** | | |
| **28. What do you think about this hygiene assistance?**<br>**Does this represent a competition for you or other vendors in the market?**<br>**If hygiene assistance were discontinued, what would the impact on the market be?** | | |
| **29. Do you know about voucher programs? Cash transfers?**<br>**What do you think about giving IDPs** | | |

| | |
|---|---|
| **vouchers or cash instead of hygiene assistance? Could these types of programs have any benefit for you?**<br>**Would you be interested in participating in a voucher program? Do you have any concerns about these types of programs?** | |
| **FINAL QUESTIONS** | |
| **30. How much do you earn from sales of ALL products on a typical day?** | |
| **31. What is the approximate value of all of the stock that you have now?** | |

## 6.Household questionnaire

# Household questionnaire- Inside the camp

| | |
|---|---|
| Data collection date | |
| Camp | |
| HH place of origin (before the | |

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| | | | |
|---|---|---|---|
| displacement) | | | |
| HH size | | | |
| Interviewer(s) | 1.<br>2.<br>3. | | |
| Interviewee(s) | Name | Role (Head of HH, etc.) | Tel |

1. **What are your monthly sources of incomes?**

| **Major sources of incomes** | **Who receives payment?** | **Baseline situation- April 2013 (value, time-period, percentage of HH income for the month)** | **Crisis situation April 2014 (value, time-period, percentage of HH income for the month)** |
|---|---|---|---|
| 1. | | | |
| 2. | | | |
| 3. | | | |
| 4. | | | |

| | | | |
|---|---|---|---|
| | | | |
| 5. | | | |
| 6. | | | |
| 7. | | | |
| **Approximate Total Value:** | | | |

**2. What are your main sources of food (in general)?**
(ask first what are the main sources and then the percentage only for the main sources)

| **Major sources of food** | **Baseline situation- April 2013 (percentage)** | **Crisis situation April 2014 (percentage)** |
|---|---|---|
| Own production | | |
| Gift | | |
| Market outside the camp | | |
| Market inside the camp | | |
| Food aid | | |
| Gap | | |

| | | |
|---|---|---|
| Other | | |

**3. What are your main sources of expenditures?**
(ask first what are the main sources and then the percentage only for the main sources)

| **Major sources of expenditures** | **Baseline situation- April 2013 (percentage)** | **Crisis situation April 2014 (percentage)** |
|---|---|---|
| Food | | |
| Health | | |
| Water | | |
| Hygiene | | |
| Shelter | | |
| Education | | |
| Livelihood assets (seeds, etc.) | | |
| Other | | |

**4. What are the main sources of sorghum?**

| **Sorghum sources** | **Baseline situation- April 2013** | **Crisis situation- April 2014** |
|---|---|---|

| | Amount per week (in SSP) | Quantity per week (kg for sorghum and maize and pc for soap) | Amount per week (in SSP) | Quantity per week (kg for sorghum and maize and pc for soap) |
|---|---|---|---|---|
| Own production | | | | |
| Gift | | | | |
| Market outside the camp | | | | |
| Market inside the camp | | | | |
| Food aid | | | | |
| Other | | | | |

**5. What are the main sources of maize?**

| **Maize sources** | **Baseline situation- April 2013** | | **Crisis situation- April 2014** | |
|---|---|---|---|---|
| | Amount per week (in SSP) | Quantity per week (kg for sorghum and maize and pc for soap) | Amount per week (in SSP) | Quantity per week (kg for sorghum and maize and pc for soap) |
| Own production | | | | |
| Gift | | | | |
| Market outside the camp | | | | |

| | | | | |
|---|---|---|---|---|
| Market inside the camp | | | | |
| Food aid | | | | |
| Other | | | | |

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6. **What are the main sources of soap?**

| **Soap sources** | **Baseline situation- April 2013** | | **Crisis situation- April 2014** | |
|---|---|---|---|---|
| | Amount per week (in SSP) | Quantity per week (kg for sorghum and maize and pc for soap) | Amount per week (in SSP) | Quantity per week (kg for sorghum and maize and pc for soap) |
| Own production | | | | |
| Gift | | | | |
| Market outside the camp | | | | |
| Market inside the camp | | | | |
| Food aid | | | | |
| Other | | | | |

7. **For the sorghum/maize and soap you <u>buy</u> every week, with which actor do you get it from?**

| **Soap sources** | **Baseline situation, if HH comes originally from Juba- April 2013** | | | **Crisis situation- April 2014** | | |
|---|---|---|---|---|---|---|
| | Sorghum | Maize | Soap | Sorghum | Maize | Soap |
| Retailers inside the camp | | | | | | |

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| | | | | | | |
|---|---|---|---|---|---|---|
| Retailers outside the camp | | | | | | |
| Wholesaler outside the camp | | | | | | |
| Brokers | | | | | | |
| Others (specify) | | | | | | |

**Under which conditions: do you pay cash or under credit or do you get it for free?**

8. **For the sorghum/maize and soap you buy every week, what is the packaging and the type you choose/ the type you would choose?**

| | **Baseline situation- April 2013** | | | **Baseline situation- April 2013** | | |
|---|---|---|---|---|---|---|
| | **Packaging** | **Type chosen** | **Preferred type** | **Packaging** | **Type chosen** | **Preferred type** |
| **Sorghum** | | | | | | |
| **Maize** | | | | | | |
| **Soap** | | | | | | |

9. **Do the shops/markets inside the camp sell all the essential food and non-food items?**
   Yes No (please circle)

**If no, which items are not available?**

**If no, how do you get this non available items?**

10. **Do you access market/ shops of essential food and non-food items outside the camp?**
    Yes No (please circle)

**Do both men and women have safe physical access to these outside markets?**

**If yes, do you rather go to the outside markets to purchase sorghum/maize/soap? Why?**

**11. What are the transportation costs to the local markets? (For a return journey, if you access outside markets)**

**12. Do you know of any functional money transfer systems that usually deliver cash (such as banks, money lenders, traders, post offices, remittance companies and/or mobile phone companies) that are accessible to you?**

Yes No (please circle)

If yes, which ones?

**13. Can most women and men inside the camp physically and safely access and use these functional money transfer mechanisms (road conditions, security, are they allowed into the buildings, can they own mobile phones if money is transferred by phone, etc.)?**

Yes No (please circle)

**14. What do men and women need to access the money transfer mechanisms (ID cards, documents, mobile phones, etc.)?**

**Do most men and women have the documents they need to access the money transfer mechanisms?**

Yes No (please circle)

**If no, what are they missing documents?**

**15. If you do have access to money transfer systems, how much does it cost to use these?**

**16. Within the HH who decide on the use of the available resources and money?**

**17. Would the answer change in case of polygamous household?**

**18. Do men and women use the available money in a different way?**

**19. If you were to receive support in terms of food would you rather receive it in kind, through a cash grant or through voucher? Why?**

**20. If you were to receive support in terms of hygiene material would you rather receive it in kind, through a cash grant or through voucher? Why?**

## 7.Interview with Money transfer company

Money transfer company name & address: _____

Details of agent for potential further communication (name, role, tel #):
_____
_____
_____
_____

Data collection date: _____

Evaluation team: _____

1. Have you ever collaborated with an NGO before to do a cash transfer? If so with who, for how many HH and during which period of time?

2. If so what have been the lessons learned from this collaboration? Have you adjusted the cash distribution mechanism accordingly?

3. How many people per day can you serve? (staff #, branches # in the area, etc.) What is the maximum amount you can distribute per day?

4. What is the registration process for the HH to benefit from your financial services? Who is responsible for the data entry? What is the information you need from Oxfam and how should it be handed over to you (soft copy, hard copy, etc.)?

5. What is the money transfer and money disbursement process?

6. What are your monitoring and evaluation mechanisms? And your reconciliation mechanisms?

7. How much does the service costs? For Oxfam? And for the HH?

8. In case mobile money is considered: how much does the SIM card cost?

9. What happened in case of mistake? (transfer to a wrong number, id lost, etc.)

10. From the moment Oxfam gives you all the necessary information, how long does it take for you to proceed with the first transfer?

11. What are the security measures you put in place to ensure your clients (and potentially Oxfam beneficiaries) security?

12. Would you be interested to collaborate with Oxfam to distribute cash transfer in the IDP camps in Juba?

13. Ask them a copy of their internal regulations (if the document is public)

| ANY OTHER OBSERVATION MADE DURING THE ADMINISTRATION OF THIS PART OF THE QUESTIONNAIRE OR DURING THE VISIT TO THE MONEY TRANSFER COMPANY AGENTS (INCLUDING VISUAL OBSERVATIONS): |
|---|

## 8.Interview with EDEN Money transfer company

Money transfer company name & address: Eden Main branch

Details of agent for potential further communication (name, role, tel #):
See contact list

Data collection date: 29/04/2014

Evaluation team: Gashim and Helene Juillard

1. Have you ever collaborated with an NGO before to do a cash transfer? If so with who, for how many HH and during which period of time?

*Yes, they did collaborate with a UK based NGO (did not remember the name neither the details of the collaboration and are supposed to send further details)*

2. If so what have been the lessons learned from this collaboration? Have you adjusted the cash distribution mechanism accordingly?

3. How many people per day can you serve? (staff #, branches # in the area, etc.) What is the maximum amount you can distribute per day?

*200/400 persons/day, maximum of 300,000 SSP/ day. Eden has 17 branches in 9 different States in South Sudan.*

4. What is the registration process for the HH to benefit from your financial services? Who is responsible for the data entry? What is the information you need from Oxfam and how should it be handed over to you (soft copy, hard copy, etc.)?

*HH would ideally need an ID or eventually just a valid mobile phone number. Eden will be responsible to enter the data in their database.*

5. What is the money transfer and money disbursement process?

*The money will be disbursed directly in cash in the UN house compound by Eden agents. Eden could dedicate 4 staff for this task.*

6. What are your monitoring and evaluation mechanisms? And your reconciliation mechanisms?

7. How much does the service costs? For Oxfam? And for the HH?

*3% of the amount to be transferred to be paid by Oxfam. There will be no charge for the HH. No need for the HH to open an account or anything with Eden.*

8. In case mobile money is considered: how much does the SIM card cost?

*N/A*

9. What happened in case of mistake? (transfer to a wrong number, id lost, etc.)

*As the money will be given directly in cash to the beneficiaries, risk of mistake is limited. Eden will need Oxfam support to ensure benef identification.*

10. From the moment Oxfam gives you all the necessary information, how long does it take for you to proceed with the first transfer?

*They say 1 day, but were not 100% sure. Maybe 3 to 4 days.*

11. What are the security measures you put in place to ensure your clients (and potentially Oxfam beneficiaries) security?

*They are moving with an armed escort when they move money. This is not negotiable, but could potentially discuss the option to leave their own armed escort at UN House gate and use an UN armed escort for inside the camp.*

12. Would you be interested to collaborate with Oxfam to distribute cash transfer in the IDP camps in Juba?

*Yes*

13. Ask them a copy of their internal regulations (if the document is public)

| **ANY OTHER OBSERVATION MADE DURING THE ADMINISTRATION OF THIS PART OF THE QUESTIONNAIRE OR DURING THE VISIT TO THE MONEY TRANSFER COMPANY AGENTS (INCLUDING VISUAL OBSERVATIONS):** |
| --- |
| |