MARKET ANALYSIS IN EMERGENCIES

SUBA SIVAKUMARAN

CaLP
THE CASH LEARNING PARTNERSHIP

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A REPORT FOR THE CASH LEARNING PARTNERSHIP – CALP

SUBA SIVAKUMARAN

The Cash Learning Partnership (CaLP) aims to promote appropriate, timely and quality cash and voucher programming as a tool in humanitarian response and preparedness.

Originating from the will to gather the lessons learnt from the Tsunami emergency response in 2005, the CaLP is today composed by Oxfam GB, the British Red Cross, Save the Children, the Norwegian Refugee Council and Action Against Hunger / ACF International. The five steering committee organisations have come together to support capacity building, research and information-sharing on cash transfer programming as an effective tool to support populations affected by disasters in a way that maintains dignity and choice for beneficiaries while stimulating local economies and markets.

In 2010, the CaLP partnered with the International Federation of the Red Cross and Red Crescent societies (IFRC), with support from ECHO and Visa Inc.

For more information, visit: www.cashlearning.org

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INTRODUCTION

What are markets? Markets are comprised of actors, institutions and policies that influence the production and consumption (hence the prices and quantities) of goods and services. A market for a single good can be extremely different from that for another, even if both goods are sold in the same physical market.

Market analysis is not a new phenomenon in the humanitarian world. It can be traced back to the early 1950s when some developed countries wanted to dispose of their accumulated food surpluses[1]. The recent emphasis on market analysis has been on its use in the relatively new modality of cash transfers, but it is relevant for all kinds of agency response. Understanding how markets are affected by crises and how agency response can both be informed by markets as well as impact markets is a fundamental part of continued development in systematic programme design.

RESEARCH QUESTIONS

Despite the number of tools available and the amount of innovations in programme design, the humanitarian assistance community faces a number of challenges when conducting market analysis to inform broader programme planning in crises. This paper will address two key challenges arising from obstacles to more comprehensive and consistent detailed market analysis. By examining the capacity and current thinking within the sector this report discusses how we can improve the quality of market analysis, and its impact on humanitarian programmes.

The first of the two research goals is to better understand how markets can be approached in a manner that utilises their potential to 'strengthen' the impact of an intervention, rather than a more limited approach that is focused solely on 'doing no harm'. At a minimum, of course, 'humanitarian action [should] protect human life where this is threatened on a wide scale[2]'.

Research Question 1: How can market analysis strengthen the impact of interventions (ensuring a minimum of the do no harm principle)?

The second goal is to understand how institutions within the humanitarian sector can appropriately resource themselves to complete comprehensive market analysis well. They face not only constraints on resources, time and human capacity, but operate within an emergency context where markets, livelihoods and institutions are ruptured, baselines seldom exist and data collection can be very difficult. This report discusses ways in which investments

[1] Recognizing the possibility that surplus disposal could displace commercial imports and discourage local production in recipient countries, the international community established in 1954 the FAO Principles of Surplus Disposal, FAO Website, Food Aid, *www.fao.org/economic/est/market-analysis/food-aid/en*

[2] Hofmann et al, *Measuring the Impact of Humanitarian Aid: A Review of Current Practice*, Overseas Development Institute, June 2004

can be made to achieve improved markets analysis through exploring different options for institutional and sector capacity building.

Research Question 2: What resources are needed in terms of information, time and capacity to complete market analysis well, and when are they needed?

Traditionally, outcomes such as building human capital, building capacity for market participation, enabling individuals to become better able to save, etc., were considered the domain of development agencies. But as the humanitarian sector has undergone rapid transformational changes in practice, it is also considering how to strengthen humanitarian interventions to increase resilience. This is where markets can play an important role: in outlining mechanisms through which interventions can be scaled, identifying more cost-efficient/cost-effective methods of delivery, reviving local capacities to produce and consume, and in identifying more creative, refined and targeted responses.

This document represents the first phase of analysis by the Cash Learning Partnership: to understand how to strengthen interventions by using market analysis and what is needed to conduct market analysis well. The second phase is expected to be an action research phase in two to three different emergency contexts. It will use different market analysis tools and make recommendations on the value/usefulness of specific tools in different emergency contexts, different stages of the project management cycle, when they can be combined, for what purpose and how.

METHODOLOGY

This paper has relied on the analysis of existing literature on emergencies and markets, market analysis reports from the field, humanitarian programming literature and development literature. In addition, twenty-one structured interviews with market analysis practitioners from implementing agencies, donor agencies and independent institutions were conducted, focusing mainly on the challenges with current tools and practices and understanding how responses were predominantly designed. The methodological challenges included trying to compare the results of market analyses that used a wide variety of tools at various stages of an emergency, a significant dearth of evidence and analysis on incorporating market analysis into emergency preparedness, the lack of a consensus in the field over what are 'minimum standards' in market analysis and whether this could be reasonably answered, and the lack of a certain sample size of rigorous studies on the issue of inflation in emergency contexts and its attributable causes.

STRUCTURE

This paper is divided into five sections. Section 1 provides a brief background to market analysis, covering a survey of current tools and practice. The purpose of Section 2 is to provide a very broad minimum of the concepts (prices, quantities, trader capacities and the market chain) that must be understood in any market analysis, whether limited or comprehensive. Section 3 elaborates on further essential concepts in market analysis, such as labour and credit markets, adopting a political economy perspective and the critical value that analysis of market integration, demand and supply elasticities and market multiplier effects can afford to program. These concepts are currently not always analysed, and represent gaps in practice. Section 4 examines different stages of the project cycle such as preparedness, response, monitoring and early recovery, to understand how market analysis can better inform these stages. Section 5 examines recommendations for future areas of investment based on the above gaps and its implications for the humanitarian sector, followed by a brief conclusion.

SECTION 1: BACKGROUND

What are the kinds of questions that market analysis has to answer in humanitarian programming?

An example of a household, a disaster and planning questions

Consider Shan, a 32 year old smallholder farmer whose crops have been washed away by floods. His nearest livestock and produce market is 3 kilometres away, but passing the roads is only possible with a bullock cart. Two out of ten traders come from the same community as Shan and are unable to supply the market, so the market only has 60% of the rice it supplied before (and bread is 30% more expensive, for the same nutritional value). He has one goat that is still alive. He has a house of which a quarter of the roof has been damaged. The market for buying housing tools, tiles and cement is 2 hours away and has not been affected by the floods, but the suppliers there are unprepared for the large reconstruction demand. Around him are thirty families facing similar circumstances with varying assets.

Agency X has conducted a needs assessment and verified the eligibility criteria. Their objective is to ensure that consumption for Shan and his family is back to pre-emergency baseline levels or 30% more staple foods are consumed. Agency Y has determined that they will assist Shan with shelter.

Should X give Shan cash, rice or bread (locally procured or imported)? Should they use vouchers for food items or fix the roads so that he can sell goat milk and find other livelihood opportunities? Or should it be a mixture of all (and if so, how)? How long should they do so for? How frequently? Until the markets are back to normal? When will that be (what might happen between)? Will Shan use the cash or food purely for his consumption purposes or will he use the aid to pay off debt, or for his children's education? Would that affect how much the agency should give him?

Agency Y faces a similar set of questions, including the possibility of flash inflation or longer-term inflation, and the larger amount of one-time aid transfer also likely carries different implications for Agency Y, of targeting, accessing/partnering, and monitoring that aid goes to its desired purposes.

Additionally, it is very likely there is some integration of Y and X's markets (e.g., if it was in water, health or sanitation or food, fuel and services), which should be considered for possible increased efficiencies and other consequences. And finally, if there is a likelihood of such an emergency happening again in the same areas, how should both agencies monitor markets in an ongoing manner and use these experiences to inform their contingency planning?

These questions only provide a small snapshot that shows the breadth and depth of what questions market analysis can answer. If one would attempt to visualise the range of objectives that market analysis could help meet (as one part of a larger humanitarian analysis and response), it could look like the diagram below, spanning the spectrum from a minimalistic Do No Harm approach, to one where market analysis increases efficiency and effectiveness of responses, and onward to one where market analysis is used to strengthen interventions.

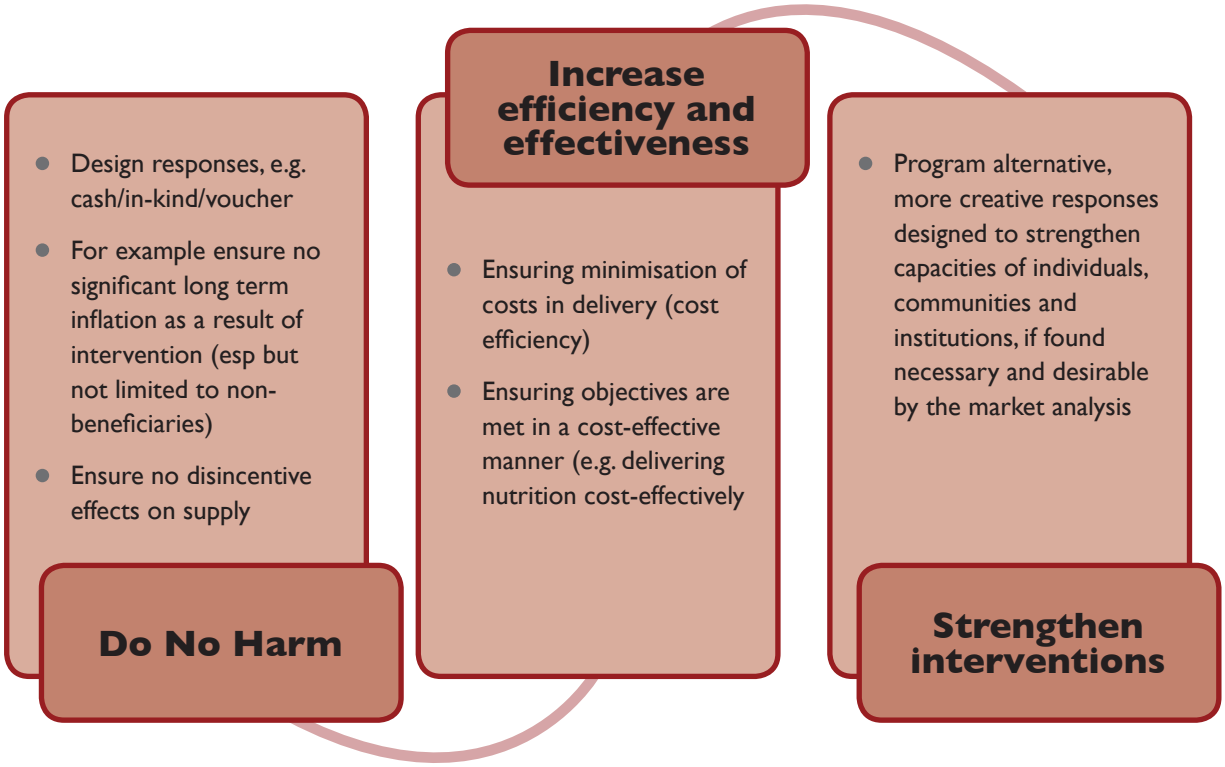

Figure 1: *Illustration of the range of objectives of market analysis*

Current Tools

These days a variety of market analysis tools and guidance is available. A brief summary is shown below, modified from a list put together by the World Food Programme[3]. With the term 'macro tools' we refer to tools that analyse the broader economy (at the national and global level). By 'meso tools' we mean tools that analyse value chains, for example, or specific sectoral issues within markets. With 'micro tools' we refer to tools that analyse individual units, such as households and traders. These tools have all been used in the emergency sector to inform not only response, but ongoing monitoring. They have also been used in early warning systems.

[3] World Food Programme, 'Market Analysis Framework: Tools and Applications for Needs Assessments', Food Security Analysis Service OXDF, 3 Oct 2011, Draft for Internal Guidance.

Given the number of tools, approaches and conceptual frameworks, the task of integrating market analysis into assessment practices, let alone implementing responses, has been daunting for non-specialist personnel[4]. The EMMA tool has been the one most commonly used by humanitarian personnel to date, followed by the MIFIRA tool, and we turn to a brief discussion of both those tools here (a more detailed discussion is found in the annex).

SUMMARY OF CURRENT MARKET GUIDANCE TOOLS

Table 1: *Summary of current market guidance tools*

Scope	Analysis	Resources available
MICRO	Farm income	WFP Market Analysis Tool: How to Conduct a Food Commodity Value Chain Analysis?
	Shock scenarios	PDPE Market Analysis Tool: Shock Scenarios
		PDPE Market Analysis Tool: Price and Income Elasticities
	Trader Capacity	WFP Market Analysis Tool: How to Conduct a Trader Survey?
	Net buyer/seller status	WFP Market Analysis Tool: How to Estimate Household Net-Seller/Buyer Status and the Welfare Impact of Shocks?
MICRO-MESO	Country-level elasticities	USDA Economic Research Service (ERS)
	Purchasing power	FEWSNET Market Guidance, No. 5: Terms of Trade and Food Security Analysis
		PDPE Market Analysis Tool: Terms of Trade
		FEWSNET Market Guidance, No. 3: Adjusting Prices for Inflation and Constructing Price Indices
MESO	SCP analysis	FEWSNET Market Guidance, No. 2: Structure-Conduct-Performance and Food Security
	Statistical performance analysis	PDPE Market Analysis Tool: Market Integration
		IFPRI Food Security Portal: Policy Tools
	Value chain analysis	WFP Market Analysis Tool: How to Conduct a Food Commodity Value Chain Analysis?
	Alpha analysis	WFP P4P Monitoring and Evaluation
MESO-MACRO	Import Parity price analysis	FEWSNET Markets Guidance, No. 1: Import/Export Parity Price Analysis
		PDPE Market Analysis Tool: Import Parity Price

[4] World Food Programme, '*Market Analysis Framework: Tools and Applications for Needs Assessments*', Food Security Analysis Service OXDF, 3 Oct 2011, Draft for Internal Guidance:

MACRO	Enabling environment	World Bank Prospects: Commodity Markets
		World Bank Doing Business Reports
		World Bank Indicators
		Economic Intelligence Unit
		WTO Tariff Profiles
		IMF Country Reports
	Global commodity markets & prices	WFP VAM Datastore
		WFP VAM Market Monitor
		FAO Global Information and Early Warning System Price Tool
		Regional Agricultural Trade Intelligence Network (EAGC)
		South African Futures Exchange (SAFEX) Commodity Derivatives Market
		International Grain Council (IGC) Market Reports
		FEWS NET Production and Flow Maps
		Foreign Agricultural Service (FAS) World Markets and Trade Archives
BROADER ANALYSES & RESPONSE	MIFIRA	Barrett et al. Market information and food insecurity response analysis (2009)
	EMMA	Emergency Market Mapping and Analysis Toolkit
	BELLMON Analysis	Bellmon Profile Format
	Food Security Analyses	WFP Emergency Food Security Assessment Handbook
		WFP Comprehensive Food Security & Vulnerability Analysis Guidelines
		Famine Early Warning Systems (FEWSNET)
	Scenario Development	FEWS NET Scenario Development for Food Security
	Summary tool	Technical Guidance Sheet: The Basics of Market Analysis for Food Security
	Multiplier Analysis	IFPRI Social Accounting Matrices and Multiplier Analysis
	Multiple Market Modelling	FAO Primer on Multi-Market Models (Agricultural Policy Impact)
	Computable General Equilibirum models	IFPRI General Equilibrium Models using General Algebraic Modeling System) for Computable General Equilibrium Models

The essential scope of EMMA is to support rapid decision making for a broad range of needs[5] during sudden-onset emergencies. It has also been shown to be adaptable to other slow onset contexts. To date over twenty assessments have been done in emergencies, and over 250 individuals have been trained using the EMMA tool. The use of it in various contexts has generated a wide range of practical experiences, which yield important insights for the sector. The ways in which the EMMA experience (or the current challenges of the tool) can be improved according to practitioners, are summarised below. A more detailed discussion of both tools can be found in the Annex.

- **Response Choices:** Results of EMMA do not always translate into agency response choices, especially when out of the norm of commodity/voucher/cash.
- **Choice of critical markets:** More evidence-based guidance on the selection of critical markets is seen to be needed.
- **Timing**: Challenges abounded in ensuring that the results of an EMMA (most often this was the case with joint-agency EMMAs) appeared in time to factor into response decisions.
- **Capacity Requirement**: Although originally designed for non-specialist staff, evidence suggests that EMMAs are best implemented by experienced staff (as with any assessment)[6].
- **Snapshot does not take into account changing market conditions:** The tool itself is not designed for ongoing market monitoring and programme redesign based on changing market conditions. This is not a criticism of the tool, but it points to the lack of available guidance teams felt in general for ongoing market monitoring, etc.
- **Better linkages to other assessments**: The Market Analysis component needs to be better linked to the gap analysis (as well as the response analysis as mentioned above) and also, the market maps are extracted out and done in a standalone fashion (without the necessary linkages to context/response analysis) too often.
- **Lack of multiple market analysis**: Some practitioners felt that the tool was an intensive effort for the analysis of a single commodity. The EMMA tool, however, while designed for a single market analysis, can provide good inferences on linked commodities (e.g., those that have the same nodes – traders/suppliers – on the market chain).
- **Baselines and seasonality**: It was felt that the EMMA, which was initially designed for use in post-sudden onset emergencies, also has great flexibility/capability for being adapted to emergency preparation needs, particularly in predictable emergencies. The issue of creating good EMMA baseline information in predictable emergencies, and also EMMA snapshots at various points of the seasonal calendar, was brought up by one interviewee as potentially being of great value, given the increasing familiarity of personnel with the tool.
- **Short term response**: While the EMMA was designed as a short-term response tool, in many cases because of the intensity of resources and efforts required to apply the tool and the lack of follow-up/monitoring, its results have become applied to longer-term programming, for which it may or may not be suitable. More information and case studies are needed to understand the problems related to this point.

[5] *The EMMA Toolkit,* Introduction and Overview, p 5.
[6] Powell, Judith. EMMA Review Oxfam, Oct 2011, forthcoming

The Market Information and Food Insecurity Response Analysis (MIFIRA) framework is a response analysis tool designed to evaluate the feasibility of transfer options given market conditions and household circumstances and preferences (Barrett et al., 2009). MIFIRA's approach assesses how markets, consumers, and traders will respond to transfers and can be tailored for use in both chronic and emergency food insecurity crises. The MIFIRA tool is comparatively new, and as it is more frequently used will generate more insights.

- **Need specialist staff to apply tool:** The MIFIRA tool needs specialist staff, who are able to understand the kind of information required by the questions, as well as the limitations of the data at hand, to work with it.
- **Needs a baseline:** Because the tool needs a baseline, it is not applicable in all emergency situations. Additionally, while it produces a less subjective analysis than for example the EMMA, it cannot produce response analysis in as short a timeframe as EMMA.
- **Pre-defined responses**: The MIFIRA tool already has pre-defined response choices between cash/in-kind/voucher interventions by design, though of course the application of the tool also yields important and interesting insights into other non-traditional market interventions.

The EMMA and MIFIRA are two tools out of many that examine market analysis. Other approaches may afford greater degrees of precision by using more rigorous analysis, which refines response design (i.e., not only response choice, but also how to design and scale responses efficiently and effectively), but may not be as easily implemented. Each of these tools speak to different stages in the project cycle (some cover more than one stage, while others cover only the response stage, for example), and no single tool covers all concerns and all stages. The challenge then is not to create one tool that is applicable to all situations at all times, but to understand how to get past the limitations of existing tools, and how to re-apply them at different stages to arrive at a more comprehensive understanding.

SECTION 2: KEY ELEMENTS OF MARKET ANALYSIS

What Kind of Market Analysis is Good Enough? This was a frequently heard imperative. Many agency staff wanted clear guidelines on what kind of market analysis was good enough, or what were minimum standards in market analysis. However, besides identifying a broad minimum of the elements that need to be analysed (without these elements being necessarily sufficient), it is impossible to prescribe a one-size-fits-all approach required for all contexts. Resource constraints on the parts of agencies and donors will inevitably shape the depth and complexity of the market analysis, and the quality of the intervention that ensues. This section provides a brief overview and introduction to some key elements, attempting to pose questions about each element that are relevant to emergency programming. (All of the tools above examine at least a few key elements of market analysis, to varying degrees of precision).

Prices

Many agencies collect price data frequently, and it represents the first point of entry for many into the realm of market analysis.

- **What is the price of a good?** What is the nominal price in currency or in terms of trade (when one bag of wheat is traded for five bags of rice, for example)?
- **How are prices moving?** Attempt to understand if there is significant inflation or deflation in key markets (this could be due to a variety of factors). The question of **seasonality**[7] arises here. **How are prices moving in comparison to something else?** Attempt to understand if prices are increasing in relation to substitute goods[8], and in relation to income, particularly labour income). Attention should be paid to identifying

[7] Seasonality refers to the characteristics of goods to display periodic changes in prices and availability predictably, usually during the period of a year. From FEWS NET (Seasonality: For example, the number of traders and transport services tend to peak around the harvest period. The volume, origin and quality of commodities in the market change over the year. Local products are more common at harvest time and imported products are more common during the lean season. Road infrastructure becomes unusable during the rainy season in areas that do not have all-weather roads. The quality of perishable products such as vegetables and grains changes throughout the year and can influence prices. Market prices at all levels of the market also follow seasonal patterns.) *FEWS NET, Market Assessment and Analysis, Markets and Food Security, FEWS NET website.*

[8] There is often a lack of understanding regarding how households substitute one commodity item for the other, or commodities for cash. Particularly with cash transfers, the marginal propensity to consume the commodity in question is never 1 (i.e., the proportion of an increase in income that is spent on consumption of that commodity). Even with in-kind aid, where technically households should be

accurate substitutes for goods, capturing prices for the exact same good over time (e.g., a particular bean varietal or rice product – broken versus whole rice) so as to be able to compare apples to apples, and having a process that allows you to understand price fluctuations. In remote and rural areas, where cash is not so fluid, focus on barter prices (otherwise known as terms of trade, such as a camel for five bags of maize).

- **What happens when prices become too high or too low (and when is a price too high or too low?)** Many interventions experience price fluctuations during the course of the project cycle. This may be due to many factors: global/imported inflation, a lack of market integration between surplus and deficit areas in local/regional markets, and the effects of the intervention itself, when interacting with these situations which can amplify or depress prices further in certain contexts. For whatever reason the price fluctuation exists, it is important to measure/understand it and then consider how interventions will accommodate price fluctuations.

Assessing whether Interventions Will Lead to Price Fluctuations

One interpretation of the Do No Harm approach may mean that interventions should be assessed as to whether or not they lead to price fluctuations[9]. Isolating the causal effects of interventions can be very difficult. In the case of inflation it may be 'imported' from global price inflation, reflect structural asymmetries between local and regional markets, or be due to interventions themselves. The case study below shows how a humanitarian intervention experienced inflation, which researchers attributed to many different causes.

Brief Case Study of Price Inflation in a Large Scale Emergency Cash Transfer Programme[10]

The evidence on price inflation due to cash transfer programmes is scattered. Rigorously assessing (through econometric models for example) how much of observed inflation is attributable to cash transfer programmes can be expensive and time-consuming, not to mention inconclusive, and resources may be better allocated (depending on the context and programme) towards determining what to do instead in the situation where inflation (due to whatever cause) is observed. This presents recommendations for agencies, as they should determine what comprises threshold levels of price fluctuations and subsequent programme choices. This moves the approach away from the 'Do No Harm' minimum to a more consolidated approach of protecting consumption and production, and many agencies are already thinking about how to monitor prices and change programmes when market conditions change [see the section on monitoring and implementing changes further on].

consuming all items given to them if targeting is done correctly, it is rarely exactly 1). Understanding how households substitute one good over the other is important in identifying markets to assess, and also how much of certain goods/cash to give. Also see footnote 15.

[9] For example, price increases (i.e., cash injections and increased demand for key commodities might lead significant price increases for such commodities where supply is not elastic) and inflation, whether they lead to disincentives on production and supply (in the case of in-kind aid, for example, where beneficiaries might sell received commodities at deep discounts as has sometimes been observed).

[10] Sabates-Wheeler, Rachel, and Stephen Devereaux. "Cash Transfers and High Food Prices: Explaining Outcomes on Ethiopia's Productive Safety Net Programme." Working Paper 004, Future Agricultures, January 2010.

In Ethiopia, researchers used a two-wave longitudinal data-based regression, to identify the effects of cash transfers versus food transfers in the context. The results determining price effects are interesting and valuable to examine for an indicative study on how price inflation can occur, and how it may be missed (or the causes of it misinterpreted).

Between 2005 and 2007, Save the Children UK implemented the Meket Livelihood Development Project (MLDP) alongside the Ethiopian Poverty Safety Net Programme. The MLDP paid public works participants Birr 5 per day, enough to buy 3 kilograms of staple grain "on the assumption that the average consumer price for grain would be Birr 1.7 per kilogram" (Kebede 2006: 584[11]). In the first year of implementation grain prices rose significantly higher than usual in Meket, for **reasons directly related to the PSNP and MLDP. Firstly, traders failed to respond promptly to demand signals following injections of cash into local communities. Secondly, instead of being regular and predictable, cash disbursements were late and arrived in unpredictable lump-sums, resulting in price spikes due to demand surges when food supplies were scarce. Thirdly, some traders allegedly exploited cash recipients by charging excessive profit margins. Fourthly, many farmers who received cash transfers withheld their grain from the market, since they no longer needed to sell produce to meet essential expenses** (Kebede 2006[12]).

Although this evidence strongly suggests that cash transfers had inflationary consequences in rural Ethiopian markets, this was the first year of the programme and these effects could be interpreted as transitional: traders needed time and confidence to react to the demand signals associated with cash transfers – late and erratic deliveries of cash – and to problems with programme implementation. Nonetheless, "**in the immediate term, the fact remains that the increase in prices has meant that cash recipients in Meket were unable to purchase the necessary food baske**t" (Kebede 2006: 597[13]).

The **second source of price variability is seasonality, which is significant in rural Ethiopia, where grain prices are among the most volatile in the world** – and this volatility has not reduced by much since grain markets were liberalised in the 1990s (Gabre-Madhin and Mezgebou 2006). Between mid- and late 2005, these prices varied by 39%, with the greatest variability (65%) where average prices were lowest (SNNPR), and the least variability (29%) where prices were highest (Tigray). The PSNP payment rate was set at 6 Birr per day in 2005-06, on the assumption that this could purchase 3 kilograms of staple cereal, at prices prevailing at the time. **No allowance was made for price differentials between (and even within) regions, or for fluctuations that might occur in food prices during the year (specifically the likelihood that food prices would rise during the months preceding the next harvest).**

In fact, significant variations were observed in prices over space and time, which means that the **conversion rate of PSNP cash transfers into food staples was highly variable from woreda to woreda and from month to month**. Because of this price variability, the purchasing power of the cash transfer in terms of staple **cereals varied by more than 100%,** from as little as 2.5 kilograms (in Tigray in mid-2005) to as much as 5.9 kilograms (in SNNPR in late 2005). On average over the year, 6 Birr could purchase more than 3 kilograms of staple food in two regions (Oromiya and SNNPR), but less than 3 kilograms in the other two regions (Amhara and Tigray).

[11] Kebede, E. "Moving from emergency food aid to predictable cash transfers: Recent experience in Ethiopia." *Development Policy Review* 24, no. 5 (2006): 579–599
[12] Ibid.
[13] Ibid.

Quantities

The availability of goods, for cash, voucher and in-kind programmes is a key indicator of potential shortages or surpluses. Sometimes it may take time for prices to adjust to quantities available, so relying on prices alone is not enough to indicate (before an intervention) if the market will support the scale of the intervention in question. That is, if the objective is for 20,000 households to consume 2 kilograms of wheat every week, the market must then supply 20,000 x 2 kilograms (40,000 kilograms) *every week* for however many weeks, and perhaps from one specific locality. The problem is that information on quantities available (or exchanged) is less visible. Asking traders and trying to cross-check their responses with their suppliers is critical if the programme is attempting to directly procure from local markets without any intensive market assessment being done. This is related to also estimating the supply elasticity of the market in question, trader capacity to procure different volumes with defined time constraints, and understanding the value chain behind a specific commodity.

Trader Capacity

Traders[14]**:** Trader surveys should 'indicate potential difficulties / capacities for stockpiling and traders' access to working capital (credit). This will determine their capacity to expand supply, at what prices, and how long for (and how long it will take them to expand the supply, etc.), and it is also an attempt to anticipate shortages that might occur. Traders' information is one of the main aspects in the marketing chain, because they are the main link between producers and consumers. Very often traders can give very valuable insights about the markets, which cannot be found in secondary data. Surveying traders should also reveal information about transport and transport costs. Taking into account trader needs as well is also important for ensuring this significant intermediary link of functioning markets is as stable and strengthened as possible.

Commodity Market Chain

The market chain for a particular good consists of the critical linkages between livelihoods, markets and institutions (tangible and intangible, formal and informal). An example of a market chain can be found in the EMMA mapping structure below of the rice market system in Northern Sri Lanka in early 2011, which looks at policies and institutions that influence markets, the supply and distribution chain for rice, and disruptions and critical issues for these actors/institutions. A market chain analysis can be completed for any good/service in question, including labour markets, shelter-related markets, health-related markets, etc. Within market chain analysis, there will always be questions of what to analyse and what not to analyse, which will vary on the context, the resources and constraints faced.

[14] SENAC, World Food Programme *Guidelines on Market Situation Analysis and Forecast and Response Protocol*, Rome, August 2007

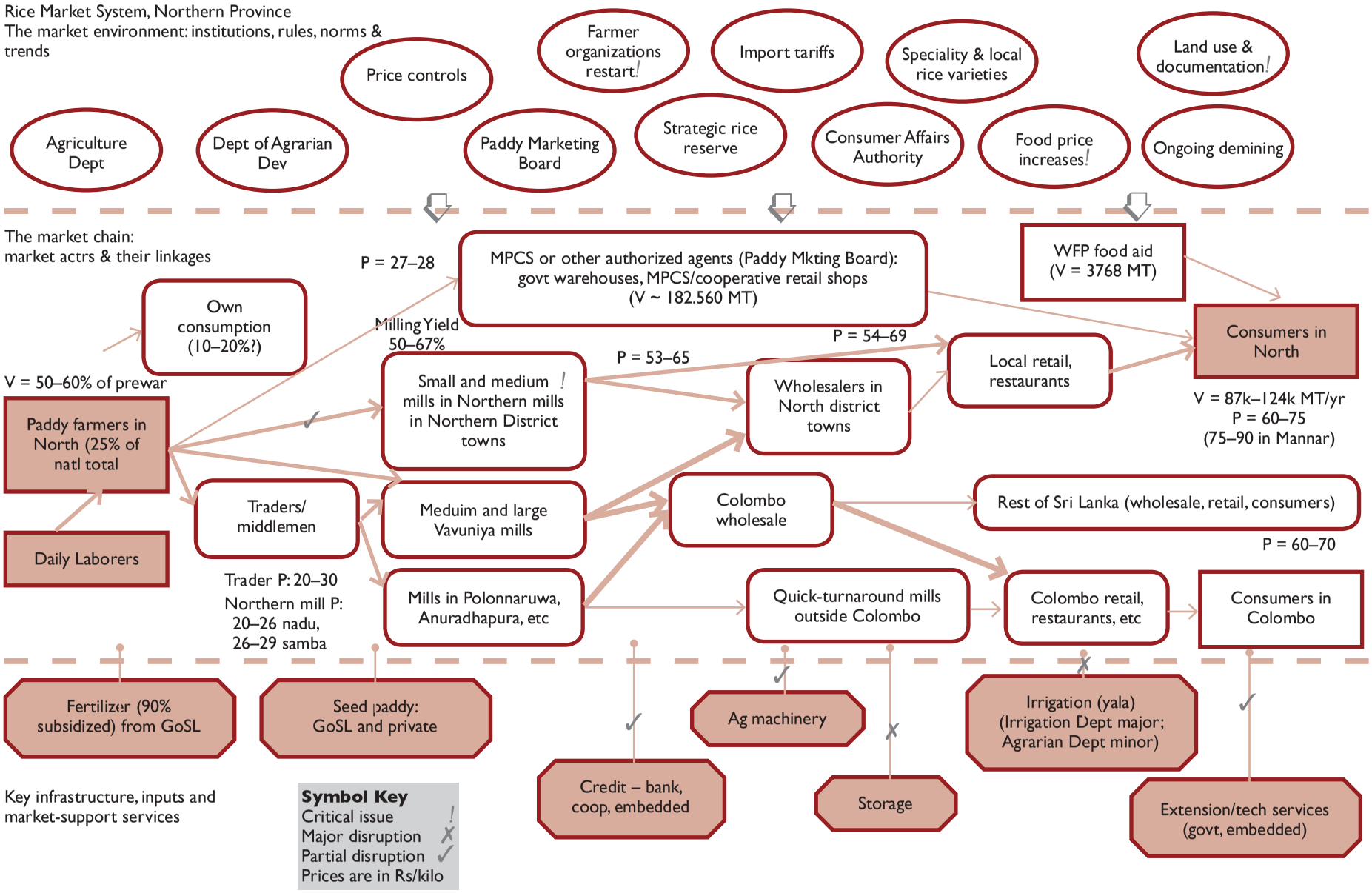

Figure 2: *EMMA mapping of the rice market system in Northern Sri Lanka*

For market analysis, the purpose of analysing the market chain is to understand how supply and demand are interacting and disrupted at this moment in time, what the response will be, and where interventions should be targeted to revive key market actors in order to restart market chains and the local provision of essential goods and services. Also, beneficiaries should not only be seen as recipients, but as active market actors as well.

Beneficiaries as market actors

There is one element of market chain analysis that is not always adequately covered, which we address here, and that is the issue of household preferences. Households have complex relationships with markets, which influence their true preferences for the type of transfer they receive. This means, for example, that household access to markets, and their confidence in participating in markets among other things, influence their preference for cash/in-kind or voucher aid. So, preferences for in-kind aid cannot be construed purely as a respondent indication of market failure, as preferences for cash cannot be construed as a respondent indication of market functioning.[15]

If beneficiary preferences are important to take into account for organisations in designing their transfers, more work needs to be done in isolating and revealing beneficiary preferences through careful survey work on expenditure, income and preferences. Interventions could also be designed around these preferences (as has been done in some circumstances, e.g., agencies organising transportation for beneficiaries to markets).

[15] Findings from a recently concluded MIFIRA study in Kenya showed that beneficiaries preferred a mix of cash and food versus cash alone or food alone, and that when these preferences were modeled (using a multinomial log regression model), market-related variables did not offer a clear signal of preference for cash over food, or vice-versa. This suggested that markets were generally perceived to effectively trade cash for food, and that preferences for food or a mix of food and cash were thus driven by non-market considerations (such as confidence of the household in participating with markets, travel times to markets, etc.) – also see footnote 8. See Mude et al. Manuscr*ipt: Responding to food insecurity: Employing the MIFIRA framework in rural Northern Kenya*, 2011

SECTION 3: FURTHER ESSENTIAL CONCEPTS IN MARKET ANALYSIS

The basic concepts above represent a broad minimum of elements that must be analysed as part of any market analysis. However, they do not always by themselves constitute a 'good-enough' understanding of markets for the purposes of programming. The significant prevalence of humanitarian programming in conflict and/or fragile situations, the dominance of cash-for-work as a response, and the substantial evidence that households use transfers to repay debt, necessitate a deeper investigation of these related markets and market actors. The relevance of these markets areas to humanitarian programming is examined below.

In addition, more rigorous techniques of market analysis (which involve examining basic concepts as well as additional concepts outlined above) have critical value in being able to provide greater degrees of precision and accuracy in analysis to the humanitarian programmer. In addition to more precise estimation of prices, quantities, etc., at a local/regional/global level, they can also show more accurately how interventions can be better designed to go beyond a Do No Harm approach to actively building resilience on the part of households and market actors. The value of analytical techniques that involve assessment of market integration, supply and demand elasticity, the market multiplier effect, and market modelling techniques, are briefly examined below, in an effort to provide a bridge to more technical concepts for non-economist humanitarian staff.

The Labour Market

The links between labour markets and food insecurity and livelihoods is not often understood well by analysts, who treat labour markets as independent variables, although this is changing (the World Food Programme is introducing the use of labour surveys in an integrated fashion during its emergency needs assessment phase, for example). Participation in the labour market by households affects their cash flows and assets. The inability to participate and the need for survival can thus lead to negative coping strategies, such as distress sales or participation in undesirable activities. The labour market can act as indicators of food security shocks (see below for relevant indicators), or it can act to show pockets of where markets may not be as integrated as other areas (see diagram below). Understanding the intricacies of the linkages between household labour/production and household consumption requires looking at the labour market for a given population over

time, in order to reflect seasonality patterns as well as migration patterns. Stand-alone post-emergency labour market assessments can of course be completed (and have been successfully done, like, for example, the EMMAs for construction labour in Haiti and for agricultural labour in Liberia).

From Central Afghanistan[16]: some labour market indicators of food security stresses or shocks in the Central Highlands include

- An unusual spike in levels of migration to Kabul, Iran, and Pakistan, especially during summer months when migration is normally less common.
- Increased numbers of labourers standing idle in the main square or at main crossroads.
- A significant decrease in daily wage rates for manual labour, especially a decrease which is not a typical seasonal pattern.
- A larger numbers of returnees to the region due to migration policies of Iran or Pakistan.
- Limited surpluses from the most recent harvest season that may reduce employment opportunities, particularly, those related to marketing and trade.
- Diminished number and magnitude of planned public works and NSP construction projects in the region.

In many instances, while a plethora of cash for work (or food for work) programmes abound, many programmes still do not conduct labour market analyses (particularly when it comes to understanding seasonality), or do not factor in population movements or labour market recovery demand[17]. While the objective of cash for work programmes might be food security based, for example, a labour market analysis is nevertheless still necessary to ensure that labour is not diverted away from more productive enterprises (and setting wage rates low

CFW and Labour Markets[18]

In Sri Lanka, programmatic errors came from the lack of understanding of labour market. Indeed, the wages for CFW were fixed at Rs.400 a day, compared with Rs.100 a day pre-Tsunami (Rs.100 = US$1). CFW activities included clearing debris, laying roads and de-silting ponds. This created inflation and also shortage of labour for livelihood activities, such as microenterprises and farming. CFW activities overlapped with the [peak] agriculture season and labour could not be obtained on time, since wages for farm labour were only half those for CFW. Therefore, some large farmers got bank loans and imported harvesters. Now that the CFW is over, the labourers are unemployed because the farms that engaged them before are mechanised. These landless labourers now need to start new livelihoods and require capital from the MFIs. They also require non-financial services, since they need to be trained to become entrepreneurs. A better design of the CFW by a relief team and MFIs could have minimised the distortions and linked the CFW beneficiaries with savings that could have helped them later to obtain loans (Aheeyar, 2006[19]).

[16] FEWS NET, Labour Markets, Livelihood Strategies and Food Security in Afghanistan, May 2007
[17] See *Pakistan Emergency Food Security Alliance, Lessons Learned* May 2011
[18] Banking with the poor network, Microfi*nance and Cash For Work in Livelihood Restoration following a Natural Disaster, 2006*
[19] Aheeyar. "Cash grants and microfinance in livelihodd recovery in Tsunami affected areas of Sri Lanka." London: Overseas Development Institute, 2006

enough to minimise such distortions may not always be enough, since households facing severe constraints may not self-select out of CFW programmes, despite higher-wage and/or capital-accumulating labour choices elsewhere).

This is illustrated by the example above.

Debt Constraints and Credit Markets

Cash transfers have frequently been employed by beneficiaries for debt repayment, as debt is frequently used by households as a coping strategy for shocks. This is not necessarily a negative coping strategy; debt utilisation (within a normal range) has always been used as a consumption-smoothing strategy. However, understanding the prevalence of over-indebtedness and the availability of credit (both of which necessitate an analysis of credit markets) is key. If households exhibit patterns of over-indebtedness, this could suggest that credit markets are distorted (i.e., money lending markets charge excessive interest rates, if for example other lenders do not exist). Interventions supporting microcredit or other financial institutions might thus be warranted.

Larger-amount credit (i.e., not individual consumption loans, but loans to petty traders, for example) availability is an important measure of how responsive markets can be to projected changes in demand/supply, as this kind of credit acts as a lubricant to the entire market chain. This kind of credit market analysis may already be available at microfinance institutions or banks in the region (who often do not participate in one or both of these two following segments: unsecured lending to the poor, or unsecured lending to petty traders), and may only need to be integrated into existing market analyses. More practical analyses and case studies in this important sector need to be commissioned.

An important point to be made also is that frequently household income and expenditure surveys, for various reasons, do not capture the burden of debt that households are responsible for servicing. An example of a financial diary below from the poor shows the complexity and sophistication of how households manage cash flows, which are relevant in understanding how credit markets and transfers (whether cash or in-kind) impact expenditure by the household.

Political Economy Analysis

The control of various key assets and capital by market actors in 'normal' emergency situations (i.e.., where goods previously flowed with ease, but are now only affected by pure market disruptions such as infrastructure breakdowns) versus complex situations (of conflict, etc.) can be extremely different. Political actors and governance issues in the latter case interact urgently with capital flows and security issues that have ramifications for market actors, and market analysis. Analysing how markets can be assessed – not only in terms of prices and good flows, but also of understanding of how powerful actors constrain market flows – can lead to important response analysis recommendations. A list of questions to ask includes[20]:

[20] Collins et al. *Portfolios of the Poor: How the world's poor live on $2 a day.* Princeton University Press, 2009

- Is there any overlap between the major market actors and those involved in the conflict?
- Does the market encourage links between groups separated by conflict, or does it reinforce divisions?
- Can specific groups affected by the conflict (such as ex-combatants) participate effectively in this market?
- How is the market affected by, and how does it affect, the conflict? Does it reinforce existing inequalities? Do market trends affect the dynamics of the conflict, either positively or negatively? How do changes in the conflict affect this market?

Hamid and Khadeja's Closing Balance Sheet, November 2000[21]			
Financial Assets	$174.80	Financial Liabilities	$223.34
Microfinance Savings Account	$16.80	Microfinance loan account	$153.34
Savings with a moneyguard	$8.00	Private interest-free loan	$14.00
Home Savings	$2.00	Wage advance	$10.00
Life Insurance	$76.00	Savings held for others	$20.00
Remittances to home village	>30	Shopkeeper credit	$16.00
Loans Out	$40.00	Rent arrears	$10.00
Cash in hand	$2.00		

Financial net worth –$48.54
Annual income $840 (approx. $2 a day)
Annual turnover $965

Figure 3: *Sample household balance sheet*

A recently concluded ICRC analysis in Gaza, for example, overlaid the vulnerability/conflict analysis map[22] below onto the EMMA analysis during three periods (one prior to the blockade, one at the peak of the blockade, and one during the easing of a blockade), to understand how market flows are constrained by political activity. While these results are still forthcoming, they suggest that questions of market functioning and access, which are intricately and integrally connected to political balances, can be jointly analysed with existing tools in a rapid manner, and present opportunities for market analysis can evolve usefully.

The above analysis has shown areas that are not currently investigated well enough, and which need to inform future market analyses. Not all can be adequately analysed in all contexts due to shortages of information and timing, but recognition and awareness of their importance is essential.

These above concepts should thus be analysed where possible as part of current market analysis (together with relevant agency-objective based commodity markets). The section below examines 'more advanced' concepts/techniques of market analysis that are usually conducted by economists/technical specialists, but the value of which needs to be better understood by non-economist humanitarian staff, so that they can decide when to commission such an analysis and how to interpret it.

[21] USAID: http://apps.develebridge.net/amap/index.php/Applyimg_a_Conflict_Lens_throughout_the_Project_Cycle
[22] Humanitarian Action in Conflict: Implementing A Political Economy Approach. The adaptation of this framework to the Gaza context, overlaid on the EMMA framework, was conducted by Ben Mountfield

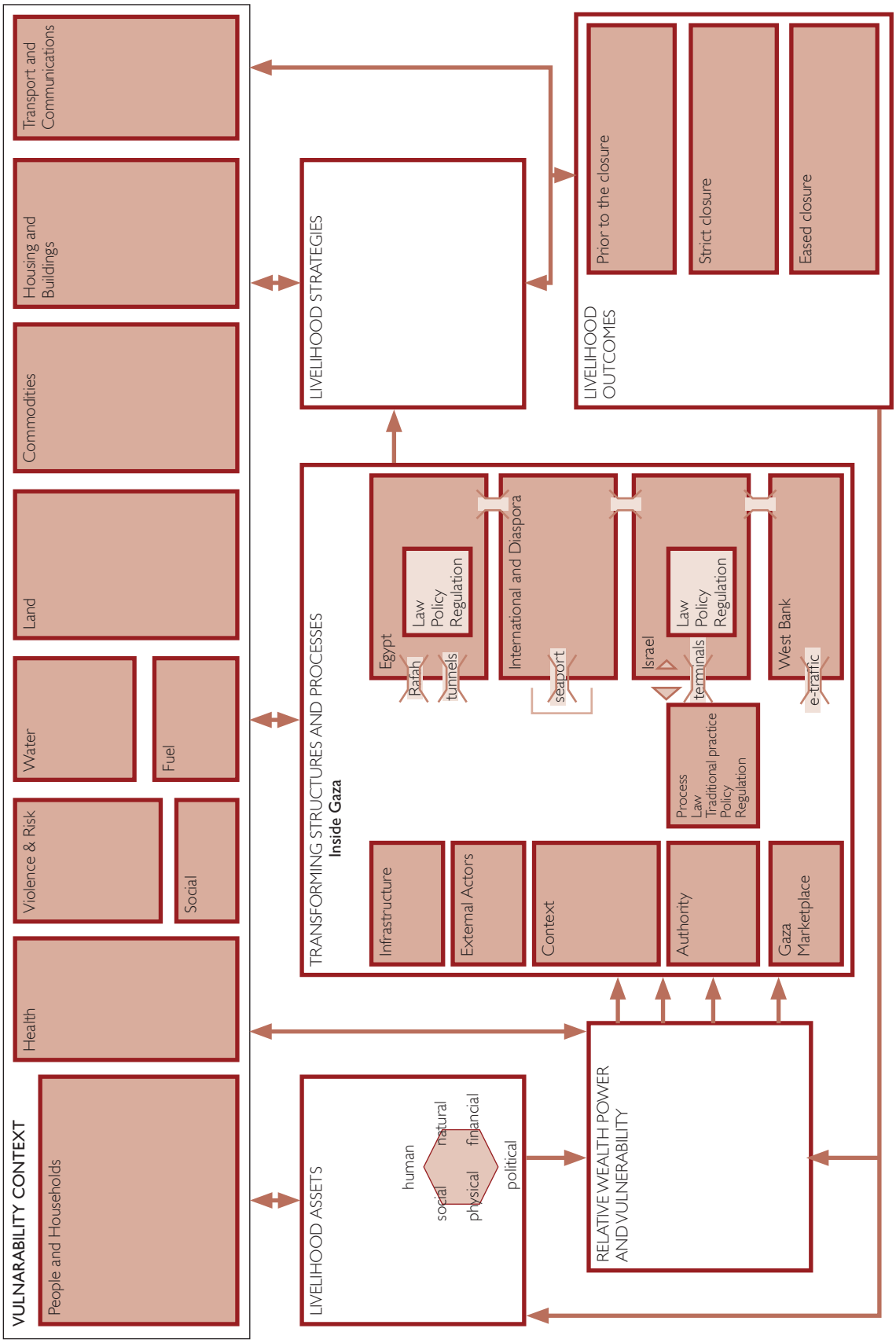

Figure 4: *Vulnerability Mapping*

Market Integration

As explained in the EMMA toolkit, a market system is integrated when linkages between local, regional and national actors are working well. In simple terms, market integration assesses how well goods flow between markets and particularly between surplus and deficit areas.

In an integrated market system, any imbalance of supply and demand in one area is compensated for by the relatively easy movement of goods from other nearby or regional markets. There is therefore a re-adjustment post-emergency, and goods flow from one place to the other at various speeds, with prices reflecting the fair costs of transport, for example, and no further distortions. Complete market integration refers to the situation where a price change in one geographically different market (for good X) is transmitted completely to another geographically different market (for the same good), allowing for transport costs[23]. Thus, what it points to is the degree to which markets are isolated, and therefore the response capacity of markets to accommodate changing flows for example, without affecting prices disproportionately.

The implications for humanitarian interventions are therefore distinct. Assessing the level of integration in markets can lead to an understanding of whether interventions will contribute to rising or depressing prices in markets (integrated/not integrated). A high level of integration between the local market and the global market will yield insights into whether, for example, global crises (such as the 2007–8 world food price crisis) may lead to price hikes at local level.

Market integration can ultimately be seen as a measure of market functionality, and therefore it is of critical relevance to the choice of intervention strategy. In general terms: the higher the level of market integration, the more efficient and effective a cash-based strategy is expected to be.

Supply/Demand Elasticity and Market Modelling

Various models have been used in the past to assess food availability in emergency contexts, agricultural supply in response to market shocks (emergency shocks) and other market functioning parameters. These models can vary in their simplicity/complexity and have been used with varying levels of success in predicting and forecasting supply and demand changes in the past (constrained as they are by, for instance, the availability of data, and by their design assumptions which may exclude certain variables).

Two concepts of price elasticity of supply and demand (normally referred to as supply elasticity and demand elasticity), which are integral to these models, can be very useful as they can potentially estimate precisely – in percentage change – how much supply and demand will change in response to changes in price. The price elasticity of supply refers to the responsiveness of supply to price changes (the price elasticity of demand refers

[23] See a fuller discussion in Rapsomanakis et al, *Market Integration and Price Transmission in Selected Food and Cash Crop Markets of Developing Countries: Review and Application*, Food and Agriculture Organization.

then to the responsiveness of demand to price changes). The correct definition of price elasticity of supply is: the percentage change in supply divided by the percentage change in price. This takes into account the availability of inputs, supply chain complexity, mobility of labour and capital, inventories and warehousing and a wealth of other important determinants.

These models are capable, therefore, of quickly assessing post-emergency (if they are built before the emergency as they would have to be) how and by how much demand and supply might change and how observed and predicted inflation will interact with interventions. They can yield adequate estimates of available commodities, prices and the timing of availability of commodities. They can also estimate how much responses themselves will affect markets (so as to estimate precisely the probability of intervention-led inflation or producer disincentives in local markets, for example), and are therefore capable of recommending more refined response options with greater certainty. For example, in Turkana, findings about the differential response capacity of small traders and large traders showed insights into the relative importance of the quality of infrastructure, prices as signals to invest and other factors[24].

The EMMA and MIFIRA tools review traders and the supply chain, but they are not market models in themselves. Depending on the complexity of the context, the scale of the response to be designed, and especially if it is meant for longer-term responses, commissioning this type of market analysis can yield extremely critical insights that would not be arrived at through other tools.

Understanding the Multiplier Effect

Cash injections (and locally procured in-kind items) in particular yield larger effects on markets than the sum of the transfers themselves, through what is known as the 'multiplier' effect. Increased cash held by households leads to increased expenditure on food, health and education, investment into productive assets, debt repayment and savings. These in turn generate local employment and further local purchases, which lead to increased income generated in the local economy (minus of course expenditure on imports). The 'multiplier' effect (the amount by which an increase in cash leads to an increase in income) can be surprisingly large from context to context[25]. Which actors reap what kind of benefits from the multiplying effect also varies from context to context.

The value of understanding the multiplying effect of interventions in markets (a quantitative estimate can provide objective comparisons between, for example response choices, but a qualitative analysis of multiplying effects can also be extremely useful. Both can show which groups benefit most from cash injections, and which groups should be strengthened to reinforce the market system, or which groups are not benefiting as much from cash injections and need to be supported.

Additionally, the knowledge of how the market multiplies injections will have distinct relevance for choosing who to target and how to intervene, and at what times. Being able to estimate the multiplier effect ultimately leads to a more informed choice that is empirically driven and not ideologically based (reducing, for example,

[24] De Matteis, A. Market Functioning in Turkana District, Kenya

[25] A review of the literature on regional multipliers conducted by Concern showed estimates for multipliers, ranging from 2.94 in Malawi to 1.2–1.7 in UK regions of similar size to Malawi, to 2.24 in Portoveijo, Ecuador, to 1.25-1.69 in Nicaragua (using employment as proxies in the latter cases). The study itself found a multiplier of 2.28 and 2.79 for Dowa. See Davies, Simon. *Making the Most of it: A Regional Multiplier Approach to Estimating the Impact of Cash Transfers on the Market*, Concern Worldwide 2008.

It was found in the DECT programme in Malawi by Concern, for example, that the multiplier was about 2.28, i.e., that for every dollar of injected cash, a total of $2.28 additional dollars of income was stimulated and created. (The actual value of the multiplier varied depending on the assumption of how much beneficiaries purchased within the local economy).

In Uganda, an approach attempted to trace out the multiplying effects by tracing the trajectory of the cash injections given to beneficiaries (a 'qualitative' multiplier analysis). It was found that 'local traders did not benefit from the project participants' expenditures as much as one would have expected, and that, in fact, large traders benefited from the following rounds of expenditures from medium scale farmers and local traders. Eventually, local authorities gained almost 3% of the cash injection in the form of taxes and service fees. They were planning to open new local livestock markets (Okwang) to meet future demand (and get more income from formal exchanges)[26]'.

Concern Worldwide's study in Zimbabwe showed that the multiplier for cash was calculated as 2.59, compared to only 1.67 for food aid (assuming 20% was used for barter exchange). 'Cash transfers had a much more positive impact on local markets than food aid'[27].

the dependence on qualitative analysis). Understanding the estimation of the multiplier requires a very rigorous systemic market analysis, and in the end provides probably the most relevant criteria to select between response choices. While time constraints may prevent its results being fed into immediate response, it should be commissioned where possible to provide results for a later stage of emergency response.

[26] Creti, P.

[27] Concern Worldwide *Hard Cash in Hard Times: Cash Transfers Versus Food Aid in Rural Zimbabwe*, April 2011

SECTION 4: HOW MARKET ANALYSIS CAN INFORM THE PROJECT CYCLE

Market analysis in current practice has so far predominantly been employed only in the response stage, with a few agencies using ongoing price monitoring to tweak programmes in their second and third iterations. However, market analysis is also essential to inform preparedness (contingency and early warning stages) as well as early response, traditional response, alternative responses to transfer-based options, ongoing monitoring and adjustments, and the exit to early recovery and the development stages. In these stages, the results of market analysis can also be factored into cost-efficiency and effectiveness estimations.

Many emergency responses (if not the majority) are conducted without adequate contingency planning, early warning and lead times, or robust baseline data. In such cases, markets are limited in their ability to be deployed as an instrument in reviving livelihoods and ensuring food security, and the response approach (when it comes to being informed by market analysis) tends to be dominated by a defensive approach of attempting to limit possibilities for price inflation (though rarely are estimates on forecasted prices also conducted). The lack of early warning price signals[28] (or other 'shortage signals' through other data), for example, limits the time available for operational responses, and limits the design of programmes, therewith ultimately constraining livelihoods resilience. The lack of robust baseline data limits the gap analysis, and can lead to inaccurate amounts of transfers, timing of transfers, scale and programme design.

It is not only the lack of actual data that is an issue, but also the lack of capacity to understand complex price and market data from early warning systems, and to be able to incorporate that into contingency planning, baseline analyses that feed into response analyses. While data can be collected by other agencies, market analysts are still needed at the operational level to translate the analysis into programme decisions. This capacity requirement is discussed later in this report. A brief overview of what needs to be done to integrate market analysis into the project cycle is outlined in the diagram below, after which we turn to each stage.

[28] Of course, not all price signals are signals of shortages.

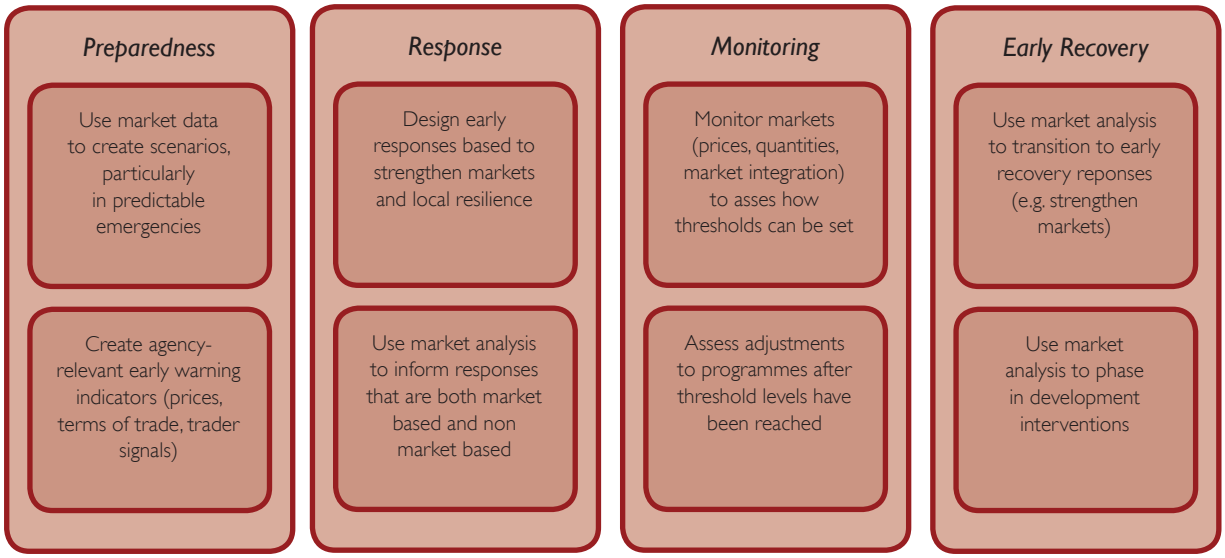

Figure 5: *Overview of Market Analysis in the Project Cycle*

Preparedness

The emergency preparedness stage encompasses contingency planning and early warning. Contingency planning using market analysis and market responses in countries that are prone to recurring disaster/conflict, or where emergencies are predictable, is an area where agencies should invest more resources and time. A corollary of this is that each agency will also have to develop, based on its mandate and objectives, a system of interpreting early warning signals (and indicators, for example, for early warning signals) through market functioning data as discussed earlier (whether these are food item price data, terms of trade of labour and commodities or labour migration, etc.). In addition, to avoid duplication and ensure a specialisation of labour, careful coordination between agencies will be critical.

The Famine Early Warning Systems Network (FEWS NET) has a model for contingency planning[29], as shown below, which is useful for identifying when contingency planning can be triggered through early warning signals.

There are two aspects to how market analysis can be incorporated into contingency planning. The first is to ensure that systems are set up that monitor markets and are capable of generating early warning signals. The second to respond to these signals by developing contingency planning that takes into account expected changes in market functioning. Scenarios that take into account expected changes in availability and prices will be needed. For both of these steps, developing a baseline through existing data and understanding early warning triggers (as well as subsequently tracing how markets will evolve through the emergency) is critical.

[29] FEWS NET The Contingency Planning Process FEWS NET website http://www.fews.net/ml/en/info/Pages/plancpp.aspx

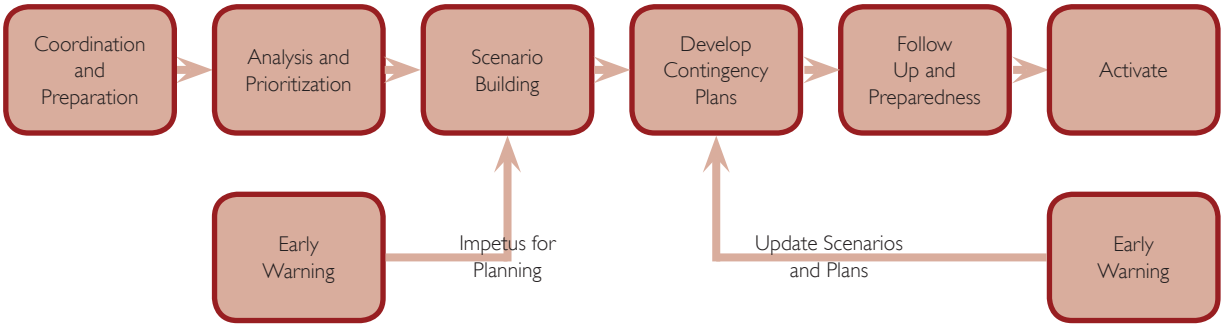

Figure 6: *FEWSNET contingency planning model*

For example, during emergencies, inflation is often observed due to external factors. Contingency planning for such events can include factoring in price changes and programme changes, as the example below, from Lesotho, shows.

The design document for WVI's cash transfer pilot[30] in Lesotho includes a section on contingency plans for a number of events. These include:

- Change in the price of staple food (as compared to October 2007 prices). Contingency actions are suggested for different scenarios (different levels of price increase as well as a decrease in price). Contingency options included: taking no action, increasing the cash transfer by different amounts (relative to the observed price increase), and modifying the programme based on consultations with beneficiaries (potentially switching to food).
- Distribution points targeted for robbery. Contingency options in this case might include discussing improvements to the system with the cash transfer agent, and suspension of the programme.

The contingency planning process requires sound analysis. It is important that it is periodically revisited and if necessary some indicators may need revision as the agency's understanding of the situation develops.

Source: Lor-Mehdiabadi et al., Evaluation and Review of the Use of Cash and Vouchers in Humanitarian Crises: Part 2: Review Report, European Commission Humanitarian Aid

Scenario-based planning will take into account for example how market access might be destroyed by floods, possible price fluctuations and shortages, and prescribe counter options. As one interviewee noted about the EMMA tool: it can be used to take a snapshot of a baseline prior to an emergency (or during the early phases of a slow onset emergency), used for contingency planning purposes (that involves scenarios) and test whether markets can supply quantities needed prior to that stage of the emergency.

FEWSNET, for example, has early warning systems that are linked to both national markets and local markets, especially from a livelihoods perspective. These valuable data are also accompanied by analysis across certain regions, and do not only include price data, but also market functioning. Also, the trade communities rely on them to earn income. This should be developed further and made available in more areas and countries that are

[30] Lor-Mehdiabadi et al., *Evaluation and Review of the Use of Cash and Vouchers in Humanitarian Crises: Part 2: Review Report*, European Commission Humanitarian Aid

prone to disaster/recurring emergencies. Below other systems (predominantly in the food security/livelihood sphere) that also collect relevant monitoring data are listed. (An expanded version of this table with countries and commodities covered is found in the Annex).

Food Monitoring and Early Warning Systems

- **GIEWS** – FAO Global Information and Early Warning System
- **FEWS Net** – USAID Famine Early Warning System
- **GMFS** – Global Monitoring for Food security
- **VAM** – World Food Programme Vulnerability Analysis and Mapping
- **MARS FOOD** – Monitoring Agriculture with Remote Sensing (EC/JRC)
- **EARS** – Environmental Analysis and Remote Sensing
- **AP3A** – Alerte Précoce et Prévision des Productions Agricoles (CILSS/Agrhymet – Sahel, only in some African countries)
- **SADC** – Regional South African Early Warning System for Food Security
- **DMC** – Drought Monitoring Centres (SADC/IGAD) in East Central Africa

Source: GMFS, http://www.gmfs.info

While the availability of early warning data is important and should be supported, the corresponding ability of agencies to interpret early warning information and appropriately plan for them should also be developed.

Response

In early incarnations of market analysis in cash transfer programming, as well as in-kind aid, there was a growing recognition that market analysis had revealed the viability of non-traditional humanitarian responses that were normally considered the purview of development agencies. Some examples are highlighted below:

Subsequent to the development of the EMMA and MIFIRA tools for response analyses, in the last 2–3 years until now a fair amount of market analysis has been conducted at the response analysis stage. Most of these have been applications of the EMMA tools, and most have been for the purpose of either identifying which transfer option to use (cash/in-kind/voucher). Interviews with some staff indicated that they viewed market analysis as a tool to refine responses which have already been pre-decided (such as cash/in-kind), given the agency's mandate. However, an interesting outcome of these reports is its recommendation of alternative market-based responses, often in tandem with traditional transfer based options (even though these response options have been implemented only in a minority of cases).

The below table shows just the top ten of responses prescribed by three EMMA reports (see Annex for a comparison of all twenty EMMA reports available at time of publication), which show the wide range of market-

Early Examples of Market Analysis and Response Choices

In Aceh, Oxfam examined the impact of imported food aid on markets in Aceh shortly after the tsunami. They discovered widespread resale of food aid, and the fact that an existing grain marketing board (BULOG) had actually had sufficient surplus and capacity to address emergency needs. As a result of food aid, local traders experienced a significant drop in sales. They concluded that the commodity markets had been well established prior to the tsunami, that general rice stocks and the supply chain were largely unaffected by the disaster, and thus a cash or voucher programme would have been preferable.[31]

In October 2005 a powerful earthquake hit Pakistan-administrated Kashmir and the North West Frontier Province of Pakistan killing more than 73,000 people. After an Emergency Food Security Assessment was carried out, WFP decided to conduct a market assessment and trader survey in the most food insecure areas. The application of "real time" market analysis proved useful in the context of this sudden-onset emergency because some markets had been destroyed and others had already recovered. The survey helped refine the targeting and design of the PRRO, and concluded that food assistance in urban areas most likely would have hindered market recovery. Thus, WFP food aid distributions were retargeted to rural areas[32].

In Northern Afghanistan, after a cash for work programme, it was realised that possibly, it was not the cash earned by CFW labourers which exerted the predominant impact on livelihoods, but the benefits of the infrastructure projects themselves, i.e., roads, bridges, wells, drinking water supplies, school buildings and flood protection, erected with their help. Transport of goods to and from local markets has improved dramatically, accompanied by a sharp drop in transport costs in many cases. Also the opening of a number of shops starting trade along the roads facilitated access to basic commodities[33].

based and non-market-based responses that a market analysis can yield, ranging from transfers to market support to policy advocacy.

A review of two MIFIRA reports from Kenya and Somalia also yielded interesting insights in a different manner, about the relative feasibility of cash transfers and food aid in different localities, with a relatively precise analysis on beneficiary preference including an estimate of the marginal propensity to consume in Kenya, trader competitiveness, supply capacities and flexibilities, the probability of price increases, and other important market insights. In the MIFIRA framework, the response options are already decided between cash and food aid (or of course, a combination) and the guiding questions are determined to assess with degrees of certainty over which response is best recommended, as well as recommendations on how to design the chosen response well (timing, amount, scale), etc.

Other emergency market studies that use econometric models that also estimate demand and supply (and sometimes cross-price) elasticities for more precise estimations of which responses to choose, for example, have prescribed both indirect support options (such as support to traders in the Occupied Palestinian Territories, as well as food aid[34]) as well as direct support options (such as a combination of food aid and cash transfers in Swaziland[35]).

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[31] Albu, M., & Murphy, E. (2007). *Market Analysis Tools in Rapid-Onset Emergencies: Phase One Report*. Warwickshire: Practical Action Consulting

[32] World Food Programme, SENAC Brief, Vol. 2 July 2006

[33] Harvey et al. *Cash for Work: A Contribution to the International Debate based on Lessons Learnt in Afghanistan* GTZ, Eschborn 2009

[34] Madi et al., *The Impact of Closure and High Food Prices on Performance of Imported Staple Foods and Vegetable and Fruit Markets in the Occupied Palestinian Territories*, World Food Programme, Dec 2009

[35] De Matteis, Alessandro, *Feasibility Study for Cash Transfers in Swaziland: An Analysis of Market Functioning*, Save the Children, Aug 2007

Table 2: *Top 10 recommendations for market-based responses from 3 different EMMA surveys*

Market Analysis	Rice Market System, Northern Province, Sri Lanka, March-April 2011	The Market System for Construction Labor in Port au Prince, Haiti	The Market System for Corrugated Galvanised Iron (CGI) Sheet in Haiti
Time	March–April 2011	February 7–17, 2010	February 7–17, 2010
Agencies	USAID/OFDA for USAID/ Sri Lanka	IRC, American Red Cross, Haitian Red Cross, International Federation of the Red Cross, Save the Children, Mercy Corps, Oxfam GB, ACDI/VOCA, World Food Programme and FEWS/NET.	IRC, American Red Cross, Haitian Red Cross, International Federation of the Red Cross, Save the Children, Mercy Corps, Oxfam GB, ACDI/VOCA, World Food Programme and FEWS/NET.
Response 1	Improved storage, based upon farmer preferences (communal or individual; in homes or at the village level; or housed in agricultural service centers or at MCPSs)	Coordination by stakeholders on how to address unclear land tenure	Distribution of cash to households for the self- procurement of iron sheets (and other building material)
Response 2	Provision of water pumps/ irrigation inputs	Short term recruitment of diaspora civil engineers and technicians to avoid drawing skills out of local private sector	Procuring Iron sheeting on the local market and distributing to affected HH
Response 3	Land documentation support	Update curriculum for skilled and professional training to take into account impact of earthquake	Distribution of "commodity" vouchers redeemable at local retailers for CGI
Response 4	Diversification into other agricultural activities: livestock rearing; cash crops such as onions, chilli, coconut; and/or other field crops; as appropriate for the locality and as responds to market demand	Training of masons, carpenters, electricians, etc. by NGOs (VSO for instance; Habitat for Humanity International provides training) Linking training to follow-on options (apprenticeship, small business loans, etc.)	Direct re-capitalization of existing micro- finance institutions
Response 5	Support to new and fledgling agro-related businesses: village-level rice mills and retail groceries, contract harvesting/ machinery rental, etc.	Virtual job board for the construction sector to match local companies with both local workers and diaspora	Cash grants to small retailers who have lost their stocks and shops for shop reconstruction and business recovery

Response 6	Reinvigoration of farmer organizations/associations (through MPCS as appropriate)	Improve communication to the public on: support for rubble removal, property rights, building permits, zoning, etc.	Advocacy towards reconstruction actors (NGOs, Government, UN....) to maximize existing market chain infrastructure
Response 7	Irrigation infrastructure rehabilitation	Support to existing training institutions: 1. Rehabilitation and reconstruction of facilities 2. Capacity building for management, faculty, and staff of local institutions (in relation to changes in application of anti-seismic norms) 3. Apprenticeship and facilitation of trainees' entry in the labor market	Price monitoring system for building materials (cement, aggregate, sand, timber, reinforcement bars, and corrugated iron sheets at major suppliers in Port-au-Prince)
Response 8	Market facilitation to link buyers to progressive private-sector actors	Placement agency for all levels of worker in the construction sector	Micro-credit for small retailers who have lost their stocks and shops (new credit lines)
Response 9	Warehouse receipts financing	Encourage Parliament to adopt law allowing separate ownership within one building (previously in process)	Support the information sharing and negotiation between retailers and wholesalers to ensure continued supplying of small stores.
Response 10	Further investigation, including seed system security analysis (SSSA) or market analysis on alternative and diversified livelihoods	Improve access to credit for construction with appropriate terms and conditions	

The above shows that alternatives to commodity/voucher/cash responses have been identified through emergency market assessments as being beneficial to restoring individuals and communities' livelihoods and critical support systems. In many cases, these alternatives are seen as being useful in addition to commodity/voucher/cash transfers (and not instead of them). However, these alternative non-transfer based responses still seem to be in the minority when it comes to actual implementation[36], even though they have critical effects on restoring markets, reducing aid dependency and strengthening interventions.

[36] There has, however, been no study comparing, for example, all the implemented responses in a given emergency versus the responses prescribed by assessment. The statement is based on the impressions from interviews with humanitarian personnel.

Agencies struggle with providing responses that run counter to their mandate (despite alternative response recommendations arising out of a market analysis framework), hence the frequent charge heard that market assessments are merely being done now to justify a pre-given response (cash, vouchers, in-kind.) As one senior market analyst said: '*mandates are already determined by agencies. Sometimes you need access to credit for wholesale, or easing of import restrictions for others perhaps or building a road or whatever it is. We encourage our partners to fund these interventions (which rarely happen) but the truth is, we are constrained by our mandate: cash food or vouchers are the only responses*'[37].

If implementing agencies across the board are to consider a wide range of responses (transfer-based and non-transfer-based), then the requisite investments in their response capacity will also have to be made. This should be seen as an area of opportunity, and there are many agencies that have already seized this in different contexts. Agencies should also invest in some type of impact assessment activity, particularly of new modalities that are non-transfer based, so that they can also improve their delivery through documenting and analysing a critical mass of such approaches.

Response analysis and implementation in rapid-onset emergencies and slow-onset emergencies can vary, depending on the data available and the coordination of agencies. The time available, resources and agency constraints will of course affect any response.

RAPID ONSET EMERGENCIES

Rapid onset or unpredictable emergencies often necessitate rapid responses without the benefit of sufficient assessment times in order to protect lives. In this case, rapid-assessment tools that allow rough and quick response guidelines (such as the EMMA) should be used *in tandem with* more rigorous market analyses[38] that will take more time to complete but have more robust results which can be fed into later programme adjustments. Another way of looking at the need to update information and reflect a more considered response as the situation evolves is to repeat market analyses frequently, i.e., repeat EMMAs frequently during key stages of an evolving rapid onset situation. This will also mean that flexibility in adjusting programmes to changing market conditions will need to be created: flexibility in funding as well as a recognition of that flexibility in changing responses (whether it is 'switching' to new responses, or refining existing responses). In addition, attention to coordination is essential (this is discussed further below).

SLOW ONSET EMERGENCIES

In slow onset emergencies, early responses can prevent, for example, destructive coping strategies that can be employed by households. Market analysis has a part to play in this, as households depend upon markets for survival strategies. Market-based early responses can preserve livelihoods[39], and at very limited cost. Save the Children, for example, found that it cost US$1 to link a pastoralist to a trader for destocking, and the transaction provided food for two months, which would otherwise have cost US$97–165 through a food aid programme (Abebe et al, 2008)[40]. Sometimes early responses are market-based responses, such as the example above. In other cases, early responses may involve non-market based responses, but to decide which response will still necessitate sufficient market analysis. In addition, early response may not always prevent a full scale emergency

[37] Senior market analyst, large international agency

[38] Alessandro De Matteis

[39] 'Innovative use of markets to meet the needs of still-mobile pastoralists, pastoralist 'drop outs' and other peri-urban destitute people can reinforce the links between these groups, in a win–win situation'. See ALNAP, *Humanitarian Responses in Drought*, Oct 2011

[40] ALNAP, *Humanitarian Responses in Drought*, Oct 2011

from happening, in which case market analysis conducted at the early stages can help design comprehensive response strategies at different periods of time.

Additionally, the view towards maintaining cost efficiency and cost effectiveness during a response (for example, when choosing between transfer-based responses) is also essential, even if full cost analyses cannot be carried out. As one interviewee said, '*being cost-ineffective and inefficient is harmful, because it ties up donor money in the short term (during the response) and it can lead to incorrect analyses and incorrect responses that harm others'.*

Increasing Cost Efficiency and Cost Effectiveness

While cost-based analyses are difficult to prioritise in the wake of a sudden onset emergency given the level of time and resources it requires, and it is difficult to generalise results across contexts (that is to say, one response that is cost-efficient and effective in one context is not necessarily so in another context), understanding the market-based concepts of cost efficiency or effectiveness allows agencies and donors to start thinking about how to incorporate cost-based questions into market analysis (whether done stand-alone or not). Recently published guidelines by DFID, for example, show the importance of understanding market functioning in determining cost analyses[41].

The examples below show that depending on the level of market integration, the point of time in the seasonal calendar and the location of procurement (national or local markets), cost efficiency and effectiveness varies between (usually between commodity/voucher/cash) response options.

Cost Efficiency in Rural Malawi[42]

Table 7.2: *Costs of increasing food security indicators by 1 percent*

Transfer	Food consumption	Food diversity	Consumption group
Food	$46 230	$622 726	$84 099
Cash	$19 451	$40284	$37 698
Mixed	$31 844	$86 753	$50 952

Table 7.3: *Alpha-values under different scenarios*

Transfer	Observed	No food pipeline break	No food or cash pipeline break
Food	1.35	0.93	0.87
Cash	0.99	0.86	0.76
Mixed	0.98	0.88	0.78

"Despite the fact that cash is more cost effective in raising consumption and nutrition for example, food is more cost-efficient. The authors say that the reasons for this are as follows. The lack of price co-movement [between international and local markets for example] – the poor integration – particularly at the beginning/end of the year, means that under the right conditions, agencies can buy low and transfer high. If non-local

[41] Hodges et al., *Guidance for DFID Country Offices on Measuring and Maximizing Value for Money in Cash Transfer Programmes.*, October 2011
[42] Audsley et al, *Comparing Cash and Food Transfers: A Cost-Benefit Analysis from rural Malawi*. World Food Programme

purchase is mandated because local prices exceed import parity, the price for which commodity is procured FOB may differ greatly from the commodity's value on the local market at certain times of the agricultural cycle. If the difference between the WFP purchase value and the recipient transfer value is large enough, such price differences can negate the operational cost savings that make cash attractive"[43].

A recent study by Concern Worldwide in Zimbabwe (which had completed a market assessment) showed that 'providing people with cash instead of food as a response to localised food insecurity' was viable. The organisation provided cash and a combination of cash and food to affected households. In doing so, the organisation also measured cost effectiveness (the amount of staple food provided by the transfer (after sharing, milling, spending patterns and prices were accounted for, was compared with the total cost of providing the transfer). Cash was 167% more efficient than food (compared to wards which received the usual WFP food ration, (Concern was a WFP implementing partner)), and 134% more efficient than cash plus food at increasing recipients' ability to obtain 1 kilogram of staple food[44].

Market analysis should be carefully applied to cost efficiency/effectiveness estimates, particularly as it is important to understand what prices to benchmark against[45]. For a more extensive discussion on this issue, a report completed in the Turkana district provides different cost efficiency estimates when prices are benchmarked against local prices and national average prices (as programmes can choose to for example, locally procure food on national markets if the option is viable)[46].

To summarise, market data can provide interesting and useful estimates of cost-efficiencies and cost-effectiveness which may not always be intuitively evident. Even undertaking brief cost-based analysis may sometimes provide good-enough guidance on response design.

Current market analysis tools do not provide substantial guidance on determining rapid cost-efficiency/effectiveness analyses. A good understanding of the key concepts of market analysis (prices, quantities available, trader capacity, and commodity market chains), however, will provide the analyst with a good understanding of the relative cost efficiency/effectiveness between options.

Market analysis is thus essential to response analysis, and this section has attempted to outline two aspects of response analysis are informed by market analysis, but which have not been widely practiced as yet. The first is to use market analysis to design alternatives to transfer-based interventions which evidence already indicates as being critical to shoring up resilience, and the second is to use market analysis to inform cost considerations in response. We turn now to the ongoing monitoring stage and the linkages with early recovery.

[43] Ibid.

[44] Concern Worldwide *Hard Cash in Hard Times: Cash Transfers Versus Food Aid in Rural Zambia* April 2011

[45] Research has noted in the case of food aid, that 'a practical method for ration basket analysis – one that goes beyond the simplistic alpha ratio to incorporate market considerations – is lacking. It becomes rather complicated to integrate nutritional concerns (e.g., ensuring a diet with the right nutrient balance) with cost-efficiency and dietary/preference concerns in a single index. This is another area where academics and practitioners must come together to develop approaches that are both practical and robust.

[46] De Matteis, A. *Market Functioning in Turkana District*, Kenya, Oxfam, May 2006

Monitoring

The issue of market monitoring, setting thresholds and adjusting programmes drew a lot of responses in interviews. Many programmers and advisors said they felt frustrated by the lack of guidance on market monitoring and setting price thresholds. Others have said that funding focused towards monitoring of markets is especially important as local and regional procurement (LRP) funding grows, and LRP is used in longer-term settings[47]. Important questions have been posed by others in evaluations of cash transfer programmes, such as: Can cash transfers be agile enough to respond to dramatic price rises (or even regular food price seasonality)? Do policy-makers have the budgetary flexibility to index-link cash transfers and adjust them frequently – perhaps even monthly? What is the appropriate mix of cash and food transfers in contexts of unpredictable and volatile food prices[48]*?* These questions necessitate the collection of market monitoring data (which is not limited to simple price monitoring data, but also relates to market chain functioning).

On the issue of collecting data and 'mainstreaming' data, one interviewee said, '*we need "eyes and ears" of data collection at tiny levels to large [levels], as well as macro analysis. A bridge needs to happen between highly local analysis (and understanding) and the macro analysis. Doing price monitoring and analysis is a lot of work; and we need to strike the right balance between the efforts of data collection and the substantialness of it. But mainstreaming is important for price monitoring*'. The ongoing experiences of the Local and Regional Procurement Learning Alliance[49], which coordinates monitoring of price data to ensure that LRP programmes do not negatively affect local and regional markets, and also coordinates data analysis among the various programmes[50], will be extremely useful for the field in general: providing information on what kind of indicators are most relevant and useful, as well as on what kind of systems are best suited to yield relevant data that have a feedback loop into programme design and ongoing improvement.

Some NGOs, such as Save the Children, have an approach where price increases are fed into HEA baselines, triggering thresholds on minimum needs met. While no standardised monitoring, thresholds and adjustment guidance exists across the field, many agencies have nevertheless been responsive in making adjustments, as seen by the examples in the box below in the case of food price variability. Price-linked adjustments to transfers or switching to in-kind or other alternatives can be carried out for all sectors, not just food.

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[47] Wei, Emily. *Local and Regional Procurement: A Case Study of Mercy Corp's programming in Haiti, Kyrgyzstan and Niger*, June 2011

[48] Sabates-Wheeler, R. and Devereaux, S. *Cash Transfers and High Food Prices: Explaining Outcomes on Ethiopia's Productive Safety Net Programme January 2010*, Working Paper 004 Future Agricultures

[49] A partnership between Cornell University and a group of NGOs that receive funding for Local and Regional Procurement programmes, such as Mercy Corps. Under this alliance, a market monitoring mechanism is currently being tested with indicators developed along monitoring indicators, pre-procurement indicators, post-procurement indicators and post distribution indicators. A strong toolkit on market monitoring guidelines has been developed, and is available at their website.

[50] LRP Learning Alliance *https://sites.google.com/site/lrplearningalliance/home*

The evidence also shows that several innovative responses to food price variability have been observed in recent cash transfer programmes in Africa[51].

- In Swaziland's Emergency Drought Relief (EDR) programme in 2007/08, social transfers were delivered half in cash and half in food.
- In Lesotho's Cash and Food Transfers Pilot Project (CFTPP) in 2007/08, a lag between price monitoring and response resulted in declining transfer value, until a once-off adjustment of 25% was made towards the end of the five-month intervention.
- In Malawi's Food and Cash Transfers (FACT) project in 2005/06 and Dowa Emergency Cash Transfers (DECT) project in 2006/07, transfers were index-linked to local food prices, and were adjusted before each monthly disbursement (Devereux 2008).

Early Recovery

Many of the responses advocated by the EMMA tool in its twenty or so applications have advocated for responses ranging from increasing market information systems, coordinating transport, improving infrastructural obstacles and promoting small trader access, to credit and a variety of 'indirect' responses that conceivably would be part of an early recovery programme. As these distinctions between early response, emergency response and early recovery begin to break down it is possible to use market-informed programme responses to generate long-lasting effects on livelihoods, production and consumption. Recognising this may mean that teams within agencies that are responsible for traditional 'development' may also start to get involved in market analysis, resulting in a more seamless programme delivery.

This could include things like providing other business enabling services for traders, instituting farmer outgrower schemes with agricultural business, policy advocacy on market information schemes, etc. Another area of integration which is also overlooked is the linkage with social protection programmes. The Roundtable on Responding to Emergency Food Insecurity through Cash Transfer and Food Voucher Interventions, held by USAID to better understand the use of cash and vouchers as emergency responses to food insecurity, recommended the linking of emergency cash transfers to social protection programmes, or other longer-term development initiative; a recommendation which was also made in the Good Practice Review[52] by the Overseas Development Institute. Such linkages should be explored for other types of emergency LRP as well, as LRP has the potential to have longer-term development impacts[53].

Finally, there is a distinct need for coordination amongst agencies and donors during all of these stages, at field, regional and headquarter levels, and particularly in the area of coordination of the collection of data. For all types of response, the value of long-term data in contributing to the development of baselines and pattern identification should not be underestimated. Questions must be "answered both at the national and

[51] Sabates-Wheeler, R. and Devereaux, S. *Cash Transfers and High Food Prices: Explaining Outcomes on Ethiopia's Productive Safety Net Programme* January 2010, Working Paper 004 Future Agricultures
[52] Harvey, P. and Bailey, S. *Good Practice Review: Cash Transfer Programming in Emergencies*, Overseas Development Institute, June 2011.
[53] Wei, Emily. *Local and Regional Procurement: A Case Study of Mercy Corp's programming in Haiti, Kyrgyzstan and Niger*, June 2011

regional (macro) levels and at local market shed (meso) levels, while others must be answered at the household (micro) level. Thus one approach to implementing the framework is to consider the data collection and analysis processes at these three distinct—micro, meso, and macro—scales of analysis. This raises the possibility of division of labour according to the comparative advantage of different agencies involved in the response to a given [emergency][54]". Since this is a public good (i.e., not agency-specific), it is best suited to be supported by a collective effort, led by donors. Also, it is not the case that entirely new data collecting institutions should be born in regions that do not have them. Implementing agencies that have continued field level presence in these areas can frequently be supported in collecting such micro-market level data.

The need for better coordination:

Source: Michaelson et al, 2005[55]

Finally, increased response choice requires greater cross-institutional coordination among governments and agencies. Without careful coordination, institutions' response choices can work at cross-purposes. For example, within recipient communities, transoceanic or regionally procured food aid distributions are supply-side interventions that increase the amount of food available.

In contrast, cash and voucher distributions are demand-side interventions that lead to increased spending by recipients. Both types of interventions can impact local prices, consumers and producers, but in opposing directions. The combination, particularly without coordination, has the potential to create price volatility and instability. Response analysis can guide agencies selecting between demand and supply side interventions, or can assist agencies determining if an intervention combining or sequencing supply and demand components is warranted.

Moreover, understanding the scope and scale of current and planned interventions across institutions can help analysts more accurately assess the additive effect of a prospective intervention. Evaluating likely total effects is of special concern when multiple institutions seek to procure food aid and/or deliver cash and vouchers within the same marketshed. One agency's assessment may indicate that a certain tonnage of food can be procured from a region without inducing inflation. If a second agency fails to incorporate the first's intent to purchase into its own analysis, it may proceed with local purchases or distributions of cash and voucher transfers that it otherwise would not. The net effect in the market could be increased prices, harming food purchasers and potentially decreasing the value of distributed cash and voucher transfers. Thus, there is growing need for locally-based coordination across operational agencies.

[54] Barrett, C. B., Bell, R., & Lentz, E. C. (2009). *Market Information and Food Insecurity Response Analysis*. Springer.

[55] The following section is taken from Michelson et al. Cash, Food or Vouchers in Urban and Rural Kenya? An Application of the Market Information and Food Insecurity Response Analysis Framework, Draft, Forthcoming, 2011

SECTION 5: FUTURE AREAS OF INVESTMENT

The discussion above both on areas of market analysis that are currently not conducted well, and stages of the project cycle where market analysis needs to be better integrated have thus identified areas of investment that the humanitarian sector must seriously consider if systematic progress is to be made. **Recommendations** for investment have been made in four areas: data, capacity, increasing rigour and standards and systems.

Data

Data Collection: In many countries and regions within countries, external institutions like FEWS NET and others collect relevant market data (mainly concentrated on food security and livelihood support). This needs to be supplemented by long-term monitoring in regions and localities where such data is not always collected, or where national institutions are not always robust. This also needs to be collected at the level of different markets (national and regional, which services like FEWS NET may cover, but also highly local markets that agencies have chosen to intervene in, in which data must be collected by field office staff by default).

Long term data collection: Emphasis should also be made in maintaining long-term field teams, particularly in field areas that are not covered by external data collecting institutions. These field teams would be integral to maintaining good quality data that would enable better price modelling, better forecasting and more accurate targeting and designing of interventions. Finally, creating low cost market information systems in areas where data are currently difficult to obtain is not impossible. Examples from the development sector abound (e.g., local information systems using rural radios, mobiles and others have kept market information circulating, reducing transaction costs and integrating economies). Interesting advances have been made in technology that allow/facilitate market performance, which is an area too for donors and agencies to examine[56].

[56] For example, in Niger, it was found that the introduction of mobile phones is associated with a 20-percent reduction in grain price differences across markets, with a larger impact for markets that are farther apart and those that are linked by poor-quality roads. Cell phones also have a larger impact over time: as more markets have cell phone coverage, the greater the reduction in price differences. This is primarily due to changes in grain traders' marketing behaviour: cell phones lead to reduced search costs, more market information and increased efficiency in moving goods across the country. See Aker, J. *Does Digital Divide or Provide? The impact of cell phones on grain markets in Niger*, Center for Global Development, Working Paper, Oct 2008

Also, increasing data collection capacity will ensure that impacts along the entire value chain and importantly, seasonally relevant impacts and functions, can be documented[57]. Such monitoring would include not only local market informant monitoring, but also related value chain elements such as weather and crop conditions, trade flows, labour market flows and even household expenditure.

Capacity

While there has been increasing recognition of the role that markets play, agencies have been slow in building market analysis capacity within their organisations. Interviews with donors have said that only about 30–40% of proposals submitted to them for emergency response funding have any sort of real market analysis in them (this includes EMMA type assessments but frequently just includes less rigorous market assessments).

Capacity: While donors have recognised the dearth of market analytical capacity in country offices, regional offices and headquarters and taken active steps to remedy the situation by increasing their technical capacity, the sense that was received from interviews with practitioners was that more can be done to increase analytical capacity on this end. There are two aspects to this. The first is increasing the general awareness of the value of market analysis (and a broad understanding of what that would entail) throughout donor agencies. The second is to increase the availability of technical capacity (particularly two types of technical capacity: field specialists with deep contextual understandings of markets and analytical capabilities, and technical specialists who can assess elasticities, etc.) throughout regions. For regions where predictability of emergencies is high specialist (economist) market analysts will be particularly useful to understand a complex market picture. They will be capable of determining market integration, demand and supply elasticities and capable of building basic market models (or understanding them) to assess the viability of interventions.

It is not only the lack of actual data that is an issue, but also the lack of capacity to understand complex price and market data from early warning systems, and to be able to incorporate that into contingency planning, baseline analyses that feed into response analyses. While data can be collected by other agencies; market analysts are still needed at the operational level to translate the analysis into programme decisions. It is important to be clear that for the majority of the market analysis (with the exception of estimating multipliers, supply and demand elasticity formally) no technical (e.g., economic/econometric) knowledge is required. FEWS NET who provide widely well-regarded market analyses, said that the vast majority of their staff are non-economists, for example. But importantly, they have many years of experience interacting with markets, observing markets and analysing data. Investing in market analysis capacity by agencies is thus going to be a long-term effort. While stand-alone rigorous market analysis can be extremely useful, it cannot always be relied upon if agencies are not capable of interpreting it well.

Utilising knowledge of local staff: Many agencies also report the presence of local staff with often very good knowledge of local markets and contexts in country offices, but they may not always be fully used in market assessments and responses. These staff should be identified whichever element they are part of (in logistics teams, for example, or finance teams as well as programme teams) and their knowledge used as much as possible. As has been said, "local analysts with experience can provide background on what has happened in the past. This institutional memory is often lacking in humanitarian agencies that change/ Wei, Emily. Local and

[57] Wei, Emily. *Local and Regional Procurement: A Case Study of Mercy Corps' programming in Haiti, Kyrgyzstan and Niger*, June 2011

Regional Procurement: A Case Study of Mercy Corps' programming in Haiti, Kyrgyzstan and Niger, June 2011 move staff frequently. Local analysts also have the personal contacts with traders, trader associations, farmer associations, and other interest groups to assess conditions and provide recommendations on actions."[58]

Early-onset situations: Along the lines of the recommendations made to donors, in regions/countries where there is a recurring likelihood of emergency, agencies should step up their market analysis capacity. This involves raising the level of awareness about the methods and value of market analysis (how it feeds into all stages of the project cycle and not just the response stage) across the office, as well as commissioning specialist market analysis and working actively to ensure that the recommendations of specialist market analysis are fed through implementation.

Increasing Rigour in Current Practice

Updating assessments in a rapid onset situation: Rapid onset or unpredictable emergencies often necessitate rapid responses without the benefit of sufficient assessment times in order to protect lives. In this case, rapid-assessment tools that allow rough and quick response guidelines (such as the EMMA) should be used in tandem with more rigorous market analysis that will take a longer time to complete but have more robust results. Another way of looking at the need to update information and reflect a more considered response is to repeat market analyses frequently (i.e., repeat EMMAs periodically during key stages of an evolving rapid onset situation). This will also mean that flexibility in adjusting programmes to changing market conditions will need to be created: flexibility in funding as well as a recognition that flexibility in changing responses (whether it is 'switching' to new responses, or refining existing responses) need to be created.

Increased flexibility in alternative responses to transfer-based options: Donors such as ECHO and USAID have in fact been responsive to funding alternatives to cash/in-kind/vouchers when presented with such options. Donors have indicated a willingness and flexibility when presented with well-thought-out proposals to consider a wide range of responses. However, official guidelines (see annex) may still present a bias towards choosing between commodity/voucher/cash modalities, which may prevent agencies from venturing too far outside of a comfort zone.

If implementing agencies across the board are to consider a wide range of responses (transfer-based and non-transfer-based), the requisite investments in their response capacity will also have to be made. This should be seen as an area of opportunity and there are many agencies that have already seized it in different contexts. Agencies should also invest in some type of impact assessment activity, particularly new modalities that are non-transfer based, so that they can also improve their delivery through documenting and analysing a critical mass of such approaches.

Changing the proposal cycle: Donors should also communicate what type of market analysis they are willing to fund. This has two aspects: the rigour of market analysis and the stage in the project cycle. While specialist market analysis might be more expensive as a line-item, the overall reduction in costs that they may introduce through informing a more cost-efficient/cost-effective response will generate significant benefits. In a predictable emergency with longer timelines donors can also allow perhaps longer proposal times that reflect

[58] Donovan, C., & McGlinchy, M. (2006). *Market Profiles and Emergency Needs Assessments: A Summary of Methodological Challenges.* Rome: World Food Programme.

the time necessary to conduct such rigorous market analysis for a response analysis. Regarding market analysis for monitoring, subsequent programme adjustments and linking it to early recovery and contingency planning: the willingness to support such initiatives should also be communicated by donors.

The need for coordination: As has been mentioned, the need for coordination during the early phases of a slow onset emergency (for example, in collecting and analysing relevant data), as well as during the response stage, is critical. Coordination is possible through the cluster approach, for example. Sectoral clusters should also be coordinated, particularly for multiple cash transfer programmes (that may have different objectives) since evidence indicates that unless there is strong conditionality, households spend cash in consistent ways, despite it being given for different objectives.

Standards and Systems

Creating a baseline and updating market analysis: In a rapid onset emergency, time is often spent creating a baseline (e.g., an EMMA baseline) retrospectively. As one interviewee said, because this is done under necessary conditions of speed, the quality of the baseline, the response analysis and the outputs are also limited. Creating EMMA maps that are then updated as emergency progresses is thus useful to map rapidly changing conditions. They also have the added benefit of acting as a preparation for indirect responses (i.e., alternatives to transfers for where such responses are appropriate) so that once the work is underway, these options do not come as such a shock to implementers and funding partners.

Contingency planning using market analysis and market responses in countries that are prone to recurring disaster/conflict or where emergencies are predictable is an area in which agencies should invest more resources and time. A corollary of this is that each agency will also have to develop, based on its mandate and objectives, a system of interpreting early warning signals (and indicators for example, for early warning signals) through market functioning data as discussed earlier (whether these are food item price data, terms of trade of labour and commodities or labour migration, etc.).

Communicating a message regarding standards: Because of the influence that donors command in being able to set standards and guide humanitarian aid,, they should communicate a message that more rigorous market analysis that informs responses will be 'rewarded', particularly in complex situations. In countries that are prone to repeated emergencies or protracted conflicts, or that are undergoing transition into early recovery/development situations,, the relative abundance of data, relative stability of at least some market functions and the ability to conduct more rigorous market assessments necessitates a more intensive focus and funding of thorough market analysis. It is difficult to apply broad guidelines on what 'more rigorous' is, besides the obvious recommendation that certain methods and models of market analysis present more objective analyses and recommendations than others (such as market models). Donors can also work with agencies on refining their proposals and refining their interventions along these lines.

Awareness of components of market analysis that are not always considered: As mentioned earlier, this includes work on integrating labour market assessments with traditional emergency response assessment and analysis (especially as cash for work programmes continue to dominate the cash portfolio[59]). Regarding credit

[59] Initial data also suggests that the majority of cash/voucher programmes funded are in cash for work programmes (for example, 147 projects funded out of the 189 of ECHO's portfolio after 2000 in cash and voucher programmes were for cash for work programmes). See

market assessments: it also includes working with banks and microfinance agencies in areas to understand the credit situation in the local context (and have rough estimates of available credit, interest rates, prevalence of over-indebtedness, etc.). Finally, conflict-sensitive market analysis should also be conducted, with the assistance of well-informed neutral local staff, for example.

In complex contexts (e.g., conflict contexts): the importance of conducting market analysis alongside a good recognition of country-specific political economy analysis should be considered and emphasised by donors, both in their guidelines and in their technical assistance.

Ongoing monitoring frameworks: Market monitoring guidelines should be assessed within each agency's capacity and mandate in both slow and rapid onset emergencies. Guidelines for assessing thresholds and a range of possible programme adjustments or switching to new responses should also be collectively discussed within agencies, with a view towards institutionalising what is relevant for each agency's mandate and modus operandi.

Conclusion

Today's emergencies have shown the need for increasingly complex humanitarian assistance. And donors and agencies alike work together in the context of increasing demand for constrained resources. There is thus an urgent impetus and responsibility to create high-impact responses, based on the best possible information.

Market information and analysis are critical instruments in an arsenal of instruments available to the programmer. Their usefulness is determined by their quality and timeliness at each stage: from preparedness to response, to monitoring and early recovery. Information and analysis that embrace the complexity of markets while generating useful recommendations are thus essential. Gaps that are evident now in understanding labour, credit and political perspectives should be paid attention to. More rigorous market analysis should also be understood and commissioned by programmers. There is, as mentioned, an important aspect of urgency and timeliness in ensuring that market analysis remains relevant to programmers. Investing in systems, capacity and data collection is of paramount importance. Doing so will ensure that agencies respond with increased agility, flexibility and continued innovation in emergency situations.

There is great promise, change and responsiveness within the field of humanitarian practice at this juncture. Donors and agencies alike are responding to emergencies with a constant eye towards piloting improved approaches in order to take the field forward. Market analysis is being conducted by an increasing number of practitioners, and awareness of its critical importance in protecting lives is growing by leaps and bounds. It only remains to close existing gaps as outlined by this report, collectively by donors, agencies, policymakers and practitioners.

Lor-Mehdiabadi, W. and Adams, L. *Evaluation and Review of the Use of Cash and Vouchers in Humanitarian Crises*, European Commission for Humanitarian Aid (ECHO), 2008

ANNEXES

ANNEX 1: REVIEW OF TWO TOOLS: EMMA AND MIFIRA BASED ON PARTICIPANT FEEDBACK

The perception of current market analysis theory and practice seemed to reflect two main strands of thought. The first was that current market analysis tools (such as EMMA or MIFIRA) **were more than capable of providing good enough analysis of markets in emergency, but that how these tools were used left a lot to be desired**, and in the end, provided analysis that sometimes was not sound, or sometimes not useful. Examples were cited particularly with inter-agency coordination that took weeks to complete and often provided responses far later than programme decisions were actually made, using critical markets that were not chosen well. In addition, many markets were left out of these assessments as well. And individuals who took part in market assessments were frequently not the same individuals making programme design decisions. In this analysis, where uniformly adequate market awareness capabilities at the country programme level did not exist, some agencies have tried to develop or adapt market tools that required less pre-training and that could be almost adopted as an off-the-shelf tool for explicitly emergency purposes.

The second strand of thought is that **current market analysis tools for emergency purposes do not go far enough in their rigour, which is especially important either for large scale programmes (such as large scale cash transfers or large scale procurement) and for longer-running programmes (in situations of chronic insecurity, etc.).** For these situations, market analysis that relies on quality data (e.g., long-term series data), simulation modelling and some level of econometric analysis (to produce technically robust analyses with small margins of error) is necessary. In an ideal situation, these '*models would be updated continuously throughout the emergency to make more explicit errors in assumptions [i.e. to highlight what kinds of assumptions are used in modelling, and where they could be erroneous (due to changing situations etc.] and lack of data, and to also allow the necessary adaptation of the aid programme*'[60]. This was seen as particularly important for large scale programmes (and debate does exist around what constitutes "large-scale". It has been suggested, for example, that if the given collective amount of a transfer programme exceeds 10% of the market, it constitutes a large-scale programme and hence should follow certain standards of rigour), but it is also important for those seeking cost-efficiency in programmes.

[60] Benjamin Watkins, World Food Programme

We turn now to the results of a brief survey and review of the EMMA approach, and then the MIFIRA approach, as the two most oft-cited tools used by humanitarian agencies.

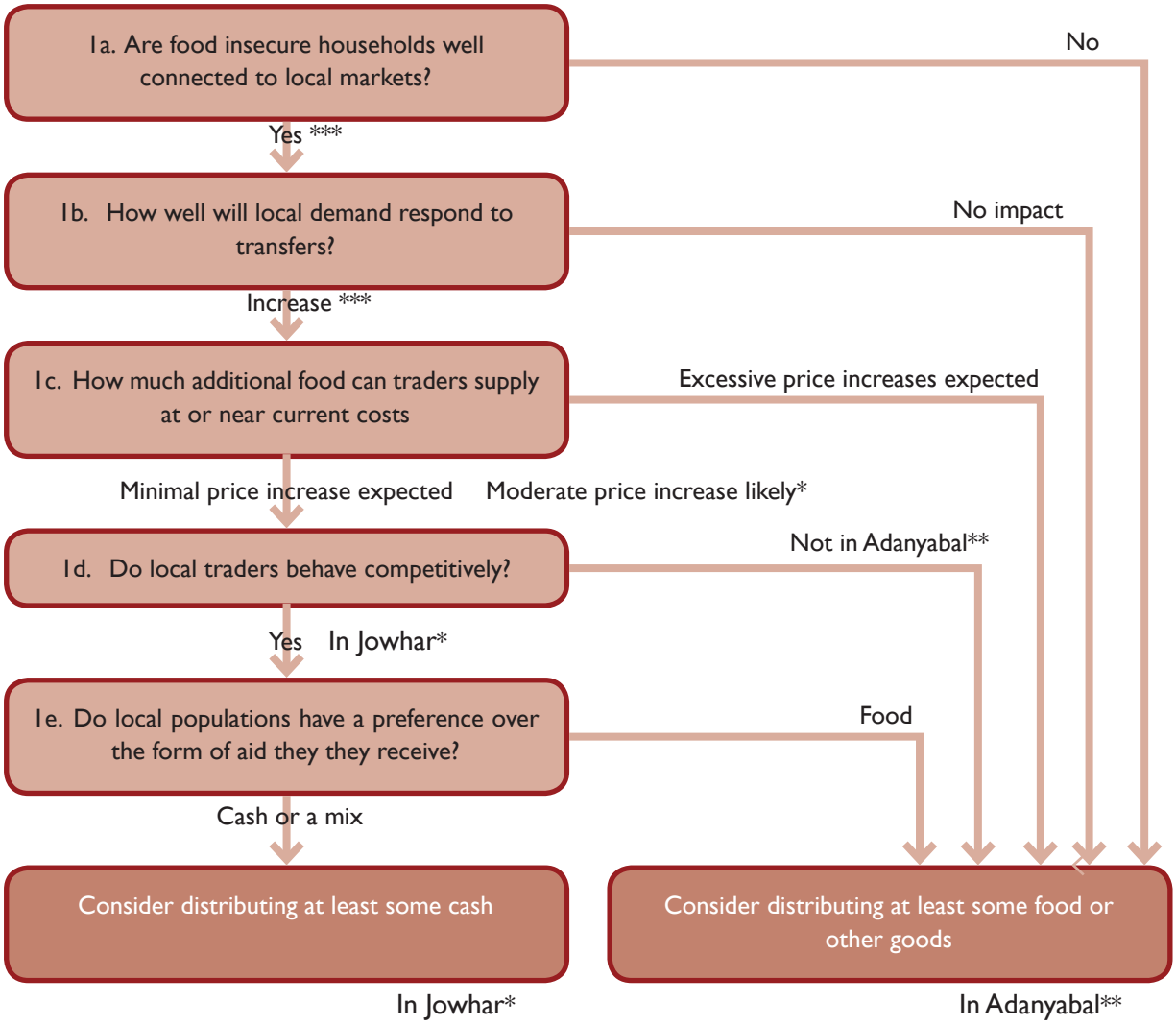
The Emergency Market Mapping Assessment (EMMA)

Linking Emma To Gap Analysis and Response Analysis: While the EMMA tool has a gap analysis component and a response analysis component, frequent observations have been made to the following effect:

- *'Linking the gap analysis and market analysis is very difficult'*
- *'Critical markets are not selected well'*
- *'It seems as though using the EMMA is mainly to justify using cash; what's the point of using EMMA to come up with other responses when we all know we're either doing cash or in-kind?*
- *'Markets change but EMMA does not'.*

The comparison of response options that EMMAs have made across the twenty assessments is available in this document below. It is useful because it shows the wide variety of responses prescribed by any EMMA. However, despite the high feasibility of many indirect responses (that were not cash, vouchers or in-kind distribution), the responses that were implemented ranged – for the majority- in the cash, vouchers and in-kind area. This has been due to many reasons.

- **Timing of EMMAs:** The timing and coordination issues, particularly with the joint-agency EMMAs, frequently took much longer to be resolved than expected; and their results may not have come in time to feed into project design recommendations (on the timing of the response, for example, or on the appropriate transfer rates, as well as on the indirect responses or even a mix of responses, such as cash AND in-kind, which is increasingly proving to be effective).
- **Lack of donor guidance:** Many practitioners mentioned that in order to submit a proposal to donors, the proposal should already reflect market analysis in support of response recommendations. There are, however, no funding or resources to do that, so what happens is that '*cash or food distribution is proposed, then the donor funds the proposal for market analysis, and then market analysis is used to justify cash or food distribution*.' Clear guidance on how donors expect agencies to fund market analysis (and what level of market analysis) at the proposal stage might be useful.
- **Lack of expertise in implementing indirect responses** and a fear they are encroaching into **early recovery/ development territory**: This brings about the central question practitioners are grappling with: if the market analysis is neutral (i.e., approached with no bias towards any response choice), as it is meant to be, and – assuming the market analysis is accurate – it becomes clear that a different intervention is prescribed to reduce aid dependency, promote livelihoods and sustain survival mechanisms of the affected, then what should we do? Currently the response to this is varied across the field: in some cases, alternative responses such as providing credit to traders are being made, but the vast majority will continue to struggle with the reach of their mandate, the needs of the affected, and the capacity of their organisations to deal with this.
- **Choice of markets:** It was expressed with many joint agency EMMA efforts that the choice of critical markets was not always relevant for each agency. This lead, for example, to some agencies thinking about adapting EMMA to create similar tools for their own needs. Certain EMMA reports have also been criticised for not selecting the right markets.



****High confidence* ***Medium confidence* **Low confidence*

Figure 7: *USAID/FEWS NET MIFIRA analysis Somalia 2011*

- **Capacity and the EMMA:** The success of EMMAs seemed to depend on the quality of the leaders and the staff implementing it. Leaders who were experienced and who had staff with good local knowledge produced the best results.
- **Linking Markets in Analysis:** One frustration that some practitioners felt was that EMMA was a relatively intensive exercise that yielded analysis of only one commodity market. Other EMMA implementers said that while it was designed for a single commodity market, many inferences about other markets could be drawn from the EMMA process itself, through a narrative that could inform a multi-market approach.

- **EMMA and the Short Term:** One interviewee said that EMMA should be a rapid response (a response that does not use technical skills) for an intervention not designed to be more than 6 months. After we use EMMA, we should be planning for MIFIRA or a stronger analysis for the 6 months to 2 years phase.
- **EMMAs not implemented fully:** While the tool has wide potential, interviewees mentioned that only the market maps were used frequently in a stand-alone fashion; and so the linkages to the gap analysis and response analysis were not as strong as they could have been. *Market mapping is extracted out, and poorly linked to gap analysis or response analysis (even though those tools exist within EMMA; most just extract and use the visual mapping).*

Market Information and Food Insecurity Response Analysis: MIFIRA

The Market Information and Food Insecurity Response Analysis (MIFIRA) framework is a response analysis tool designed to evaluate the feasibility of transfer options given market conditions and household circumstances and preferences (Barrett et al. 2009). MIFIRA is organised around two questions. First, are local markets functioning well? Second, if local markets are not functioning well enough to supply aid, is there sufficient food available nearby to meet the shortfall? For example, if markets cannot meet increased demand generated by cash or vouchers without increases in prices, delivering these forms of transfers will not support the targeted population as well as in-kind transfers of food. In addition to this analysis, MIFIRA has been field tested in Somalia (FEWS NET 2011) and northern Kenya (Ouma et al. 2010). Forthcoming MIFIRAs have been recently concluded in other locations, though at the time of this study the results were not available.

Each MIFIRA question is subdivided into a set of sub-questions to focus and facilitate analysis. The first question, which examines whether local markets are functioning, is analysed in five dimensions: (1a) to what degree are food insecure households connected to markets, (1b) what is the estimate of increased demand on food markets generated by the proposed intervention, (1c) are local traders able to meet such an increase in demand without increasing food prices, (1d) is there sufficient competition among traders in local markets, and (1e) do households have a preference over the form of aid. The second MIFIRA question – is there sufficient food available nearby to meet the shortfall? – examines the potential effect of agency food purchases on source markets.)[61].

Although there has only been a limited subset of experiences with the MIFIRA tool, compared to the EMMA tool, the initial responses to the tool may suggest future avenues of evolution.

- **Requires a baseline for it to be implemented, which presents challenges in countries that do not have these baselines.** However, the corollary benefit is that there is significant value in ongoing monitoring of markets and developing baselines, which the MIFIRA necessitates.
- **Requires specialist and experienced staff and takes a much longer time to implement than, for example, the EMMA.** While the results are less captive to subjectivity than the EMMA, the MIFIRA is still not a market model, and not as objective as such a model might be. The tradeoffs between the quality, timing, and resource constraints of the MIFIRA tool versus other tools need to be considered.

[61] Michelson et al. Cash, Food or Vouchers in Urban and Rural Kenya? An Application of the Market Information and Food Insecurity Response Analysis Framework, Draft, Forthcoming, 2011

- **MIFIRA's questions do not assess if traders can supply quantities at prices other than current or near current prices.** This is seen as a limitation to understanding, for example, supply elasticity and the relative costs of procuring at different levels of quantities.
- **Pre-defined responses**: The MIFIRA tool has pre-defined response choices between cash/in-kind/voucher interventions already by design, though of course the application of the tool also yields important and interesting insights into other non-traditional market interventions.

ANNEX 2: COMPARISON OF EMMA RESPONSES ACROSS DIFFERENT CONTEXTS AND MARKETS

Table 3: *EMMA response comparison*

EMMA RESPONSE COMPARISON		
Market and Country Assessed	THE MARKET FOR AGRICULTURAL LABOR IN SUD-EST DEPARTMENT OF HAITI	THE MARKET FOR BEANS IN SUD-EST DEPARTMENT OF HAITI
Time period of assessment (NOTE, NOT TIME OF PUBLICATION)	March–April 2010	March–April 2010
Agencies Involved in Carrying Out Assessment (not including funder of assessment if applicable)	The SEEP Network, ACDI/VOCA, IRC, Save the Children, Diakonie	The SEEP Network, ACDI/VOCA, IRC, CROSE, Save the Children
Gap Analysis	Because of the frequency of economic crises in Haiti, the January 12 earthquake cannot be treated as a one-time catastrophe causing stark before-and-after differences in expenditure and consumption. Households in Sud-Est had already developed an array of coping strategies, such as consuming more homegrown produce such as starchy tubers, and spending down cash and asset reserves. This results in a gradual decline of quality of life, rather than a large, sudden drop. Therefore, it is difficult to quantify the exact gap of meeting basic needs, and more effective to examine normal versus affected income levels. Restoring normal income levels should result in a similarly gradual increase in quality of life (e.g. starting to purchase more nutritious foods) and a buildup in savings to mitigate the impact of the next crisis.	A demand failure is the major constraint in the beans market in Sud-Est. Household income has declined post-earthquake, and one coping strategy is to purchase fewer beans. If farmers are not able to access seeds and gather sufficient labor, families that previously planted beans may switch to less expensive crops, shrinking domestic supply and increasing imports. This could lead to smaller harvests and shrunken incomes for bean growers, as well as price increases. Unsafe storage facilities and insecurity in Croix-des-Bossales in Port-au-Prince need to be addressed, however supply seems adequate in end markets; therefore this is not the key constraint in the market. Food aid has doubled or tripled in some areas of Sud-Est and may be responsible for part of the demand failure. However, households' drop in income is the stronger influence.

Response 1	Unconditional cash transfers for the most vulnerable.	Scale back beans food distribution to minimal levels (e.g. for hospitals), and transitioning to local procurement for the remaining distributions .
Response 2	Cash-for-work (timed and structured so as not to harm planting and harvest activities).	If not already done, publicize the March 31 "surge" end date to retailers.
Response 3	Distributing (continuing distribution of) quality (certified, germination- tested) seeds, ideally through local purchase programs, seed loan/seed multiplier programs, etc.	Unconditional cash transfers for the most vulnerable.
Response 4	Grants or loans to larger farmers.	Cash-for-work (timed and structured so as not to harm planting/ harvest activities)*.
Response 5	Stimulation of existing financial institutions, or establishment of new facilities, to provide agricultural finance (credit, insurance).	Distributing (continuing distribution of) quality bean seeds.
Response 6	Stimulation of alternative rural employment opportunities.	Facilitating the establishment of a private-sector seed market system for quality seeds.
Response 7	Preparation for responses for 2010 hurricane season.	Stimulation of existing financial institutions, or establishment of new facilities, to provide agricultural finance (credit, insurance).
Response 8		Improving security in Croix-des- Bossales.
Response 9		Disaster-risk- reduction responses
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Response 17		
Response 18		
Response 19		
Response 20		

*EMMA did not differentiate whether responses were high, moderate or low feasibility

EMMA RESPONSE COMPARISON		
Market and Country Assessed	The Market System for Beans in Haiti	The Market System for Construction Labor in Port au Prince, Haiti
Time period of assessment (NOTE, NOT TIME OF PUBLICATION)	February 7–17, 2010	February 7–17, 2010
Agencies Involved in Carrying Out Assessment (not including funder of assessment if applicable)	IRC, American Red Cross, Haitian Red Cross, International Federation of the Red Cross, Save the Children, Mercy Corps, Oxfam GB, ACDI/VOCA, World Food Program and FEWS/NET	IRC, American Red Cross, Haitian Red Cross, International Federation of the Red Cross, Save the Children, Mercy Corps, Oxfam GB, ACDI/VOCA, World Food Program and FEWS/NET.
Gap Analysis	Discussions with key informants in camps and in markets indicated a significant decrease in bean consumption following the earthquake. A brief survey of vulnerable households indicates that income of the average household has fallen by 60- 70% as a direct result of the earthquake. Before the shock, food accounted for approximately 35% of total expenditure. With the significant decrease in income, food costs now account for approximately 85% of total expenditure. This means that any environmental shifts that may increase the price of beans would have more significant implications on households. To calculate the gap in bean demand versus resources available to purchase demands, more accurate income and expenditure data would be required. The group faced significant challenges gathering quantitative income information, due to difficulties in accurately stratifying the affected population in Port au Prince.	We know from FEWS/NET baseline survey of 2009 that the very poorest have an average income of 9500-12500 Gourdes per month, and that they do participate in casual construction labor. This is likely to equate with the unskilled workers identified in our market mapping. Poor households in Port au Prince make 12500–17,500 Gds per month and also participate in casual construction labor. This is also likely to be represented in our maps in the unskilled labor category. Middle income households, according to FEWS/NET make 17,500–25,000Gds per month, and are likely to hold positions categorized as semi-skilled on our maps. While nearly 31% of the Haitian population receives remittances, in fact, the poorest are the least likely to receive them because they have never been able to afford to educate family members abroad or send them overseas. Initial estimates show that households are facing is a 60-70% drop in their income. This gap will obviously continue until household livelihoods can be renewed, which will depend upon how quickly households are able to rebuild their assets, and the strength of the market overall. Once the situation has stabilized it will be important to do a full HEA or baseline study to gather more in depth information on the household income, expenditures, coping mechanisms, and recovery strategies.

*EMMA did not differentiate whether responses were high, moderate or low feasibility

Response 1	Immediate unconditional Cash Transfers and/or vouchers to consumers	Coordination by stakeholders on how to address unclear land tenure
Response 2	Short to long term creation of Income Generating Activities	Short term recruitment of diaspora civil engineers and technicians to avoid drawing skills out of local private sector
Response 3	Immediate Provision of cash/vouchers/certified seeds to smallholder farmers in mountainous regions	Update curriculum for skilled and professional training to take into account impact of earthquake
Response 4	Publicizing demand stimulation programs	Training of masons, carpenters, electricians, etc. by NGOs (VSO for instance; Habitat for Humanity International provides training) Linking training to follow-on options (apprenticeship, small business loans, etc.)
Response 5	Cash for Work to repair irrigation systems	Virtual job board for the construction sector to match local companies with both local workers and diaspora
Response 6	Medium term purchase of tools in Port au Prince for distribution to smallholder farmers in the south	Improve communication to the public on: support for rubble removal, property rights, building permits, zoning, etc
Response 7	Immediate Reparation of ports – Government of Haiti or other programming	Support to existing training institutions: 1. Rehabilitation and reconstruction of facilities 2. Capacity building for management, faculty, and staff of local institutions (in relation to changes in application of anti-seismic norms) 3. Apprenticeship and facilitation of trainees' entry in the labor market
Response 8	Immediately ensure ports are open for trade – Government of Haiti	Placement agency for all levels of worker in the construction sector
Response 9	Refrain from food aid until it has been determined that the market system cannot be restored by other interventions.	Encourage Parliament to adopt law allowing separate ownership within one building (previously in process)
Response 10	If food aid is found to be necessary, consider local procurement.	Improve access to credit for construction with appropriate terms and conditions
Response 11	Immediately provide business support grants of $100–$500 for small traders	Build social housing
Response 12	Immediately provide business support grants of $500 to $1,500 for medium traders	Inspection and enforcement of building permits and anti- seismic construction norms
Response 13	Immediately institute cash for Work to repair roads, irrigation systems and storage depots	
Response 14	In the short term, implementing agencies should look for creative measures to provide security to markets.	
Response 15	before program implementation, organizations must do thorough analysis of the specific targeted population, with a focus on income/expenditure.	
Response 16	Track Dominican Republic Imports/Exports: volumes traded, amount of regulation, amount exported which returns to Haiti, effects of demand surges	
Response 17	Keep stronger baseline data: volumes imported/exported, prices, numbers of traders and their interaction	
Response 18	Conduct a more thorough analysis of formal credit to vendors, and informal credit to Madame Saras	
Response 19		
Response 20		

EMMA RESPONSE COMPARISON		
Market and Country Assessed	The Market System for Corrugated Galvanised Iron (CGI) Sheet in Haiti	The Market System for Rice in Haiti
Time period of assessment (NOTE, NOT TIME OF PUBLICATION)	February 7–17, 2010	February 7–17, 2010
Agencies Involved in Carrying Out Assessment (not including funder of assessment if applicable)	IRC, American Red Cross, Haitian Red Cross, International Federation of the Red Cross, Save the Children, Mercy Corps, Oxfam GB, ACDI/VOCA, World Food Program and FEWS/NET.	IRC, American Red Cross, Haitian Red Cross, International Federation of the Red Cross, Save the Children, Mercy Corps, Oxfam GB, ACDI/VOCA, World Food Program and FEWS/NET.
Gap Analysis	8 to 9 CGI sheets per household is representative of the total demand unable to be met by current household means. As shown in this table, the total CGI need for families displaced from their homes in Port au Prince is 1.4 to 2.7 million sheets of CGI. This gap in CGI coverage exists principally because the families who need CGI to erect an adequate transitional shelter before the rainy season do not have the purchasing power to buy it on the local market. Secondly, even if this purchasing power existed, as many as 50% of the local hardware retailers were either destroyed, left PAP for the countryside, or do not have the capital to keep the store open.	From January to June, 2 million households in PaP and Province lacked the equivalent of 17,000 Cereal- Equivalent Tonnes (CET) per month. From June to December, 2 million in PaP and the provinces lacked 9,000 CET per month. In addition to supplying this volume of food aid, the CNSA recommended that an emergency stock of 90,000 CET be constituted from July to November with up to 53% of locally produced food (depending on local food production levels) From January to June the CNSA recommended that the food aid be of 102,000 TEC (equivalent to 4.8% of the 2008 overall food consumption for Haiti). This must be compared with the 2008 food aid volume (116,063 TEC), and also consider the fact that aid volumes in 2010 will be considerably higher as Port-au-Prince was not typically an area receiving food aid.

Response 1	Distribution of cash to households for the self- procurement of iron sheets (and other building material)	Creation of National Food Reserve (Stock de Securite)
Response 2	Procuring Iron sheeting on the local market and distributing to affected HH	Establish communication between aid agencies and private sector (importers in particular)
Response 3	Distribution of "commodity" vouchers redeemable at local retailers for CGI	Ensure increased security on markets
Response 4	Direct re-capitalization of existing micro- finance institutions	Targeted distributions with more complete food baskets + simultaneous CFW or FFW
Response 5	Cash grants to small retailers who have lost their stocks and shops for shop reconstruction and business recovery	Monitoring of market system recovery and follow up of securization measures
Response 6	Advocacy towards reconstruction actors (NGOs, Government, UN....) to maximize existing market chain infrastructure	Infrastructure recovery
Response 7	Price monitoring system for building materials (cement, aggregate, sand, timber, reinforcement bars, and corrugated iron sheets at major suppliers in Port-au- Prince ...)	Ports : ensure prioritization of commercial activities
Response 8	Micro-credit for small retailers who have lost their stocks and shops (new credit lines)	Ensure access to credit and micro- credit to small business owners and traders
Response 9	Support the information sharing and negotiation between retailers and wholesalers to ensure continued supplying of small stores.	Feasibility study on local purchases of rice
Response 10		Continued targeted distributions with more complete food baskets
Response 11		CFW/ FFW
Response 12		Food vouchers
Response 13		Cash grants
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Response 16		
Response 17		
Response 18		
Response 19		
Response 20		

*EMMA did not differentiate whether responses were high, moderate or low feasibility

EMMA RESPONSE COMPARISON		
Market and Country Assessed	Cement Market System, Kyrgyzstan	Corrugated Galvanized Iron (CGI) Market System, Kyrgyzstan
Time period of assessment (NOTE, NOT TIME OF PUBLICATION)	July 23–28, 2010	July 23–28, 2010
Agencies Involved in Carrying Out Assessment (not including funder of assessment if applicable)	IRC	IRC
Gap Analysis	If political stability is maintained, the cement market is fully capable of responding quickly to a rise in demand. The supply chain is sufficiently functional that retailers have the ability to increase their stock of products – without significantly raising prices in the market – if demand does increase. The internationally-managed construction of 2,000 transitional shelters will require up to 15,000 tons of cement, which can be covered entirely by local retailers as it represents only a small percentage of the total local production capacity. Even when factoring in additional demand from self-help and reconstruction of businesses, the cement production capacity of Kyrgyzstan is ample to service all reconstruction needs. In order to preserve the livelihoods of cement market actors, it is best to procure cement from construction markets rather than to bypass the value chain and source directly from the cement factories. The international community should be extra sensitive to committing to their order of cement in order to make sure that they do not default on the order they have commissioned which would create a large financial burden on the factories who cannot store produced cement for long periods of time without it losing its quality. Cement should not be imported from outside the country as this would further impact the already decreased demand in the cement market.	Direct intervention to at the household and retail levels will stimulate the functional market system. The strength of the market system notwithstanding, it is critical that international organizations closely coordinate the aspects of their response that deal with the purchase and/or distribution of CGI. The key disruptions to the CGI market system are the decreased import of CGI and CGI raw materials and local processing capacity. With the continued closure of the Kazakh border, the supply chain has lost important input of CGI and raw materials. Retailers report a 30 to 70% drop in sales since the emergency, as construction activities slowed or stopped in reaction to the violence. Although there is variation across the geographic market areas in Kyrgyzstan, stocks and production levels are sufficient to continue meeting the reduced level of demand for some weeks. However, stocks will quickly be depleted as self-help and internationally financed reconstruction begins in earnest. Without re-establishing the flow of CGI and raw materials from import markets to levels that meet or exceed those before the emergency, and ensuring adequate processing capacity the market system will not be able to service anticipated reconstruction needs. The subsequent scarcity would most likely drive up prices and push consumers into seeking alternative roofing materials such as corrugated asbestos or makeshift solutions. Nine out of 14 CGI processors remain closed. As a consequence there may be a bottleneck in the market chain that limits the ability of the market to meet the increase in demand from reconstruction. The capacity of the 5 operating processors was not determined by the EMMA, but should be quantified at the earliest possible opportunity.

Response 1	Make bulk purchases at fixed price from local vendors.	Vouchers to vulnerable households
Response 2	Issue vouchers to those who have had homes/businesses damaged or destroyed.	Make bulk purchases at fixed price.
Response 3		Vouchers to producers for hiring temporary labor.
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EMMA RESPONSE COMPARISON		
Market and Country Assessed	Early Potato Market System, Kyrgyzstan	Wheat Flour Market System, Kyrgyzstan
Time period of assessment (NOTE, NOT TIME OF PUBLICATION)	July 23–28, 2010	July 23–28, 2010
Agencies Involved in Carrying Out Assessment (not including funder of assessment if applicable)	IRC	IRC
Gap Analysis	The early potato market system has fractured. The linkage of bulk transport from producers to large bazaars is greatly diminished. The damage to large market areas like the grand bazaar and Osh has pushed a certain volume of commerce to secondary and tertiary market areas. For example, a significant amount of business has been pushed to Zapodniy Bazaar and Frunzenskiy where the number of vendors is such that many are selling on the roadside by the market, a practice that was less common before the emergency. Vendors selling there often obtain their goods by making daily taxi trips to production areas to purchase the goods for the day's sales. In turn, these newly enlivened market areas are the source of goods for another retail phenomenon created by the crisis – the many-folded increase of produce vendors in mahalas. Fear has prevented many people from venturing outside the relative security of their neighborhoods, and markets have sprung up to service hyper-local demand. In Uzbek mahalas in Osh city, the long-standing modest collections of kiosks that represent a neighborhood's commercial center are now often crowded with produce vendors squatting on the roadside.	1) Weather conditions are causing an expected yield loss of up to 40% of the wheat harvest. 2) Long-term problems like inadequate/aged machinery, poorly functioning irrigation systems are compounded by the rising cost of fertilizer and pesticides as a result of the emergency, negatively affecting wheat producers. 3) Many high-production bakeries are closed – bread retail outlets are closed and transport linkages between bakers and retailers are broken. 4) Drought, wildfires, Russia's ban on wheat grain exports and hoarding will likely create scarcity and drive up wheat prices across the region. 5) Rising flour prices will affect bakers, especially the small, marginal bakeries operating in mahalas. 6) It is likely that some of the small bakers and market actors who lost business, or whose stores were damaged will be not able to re-enter the market chain. Without stimulating demand at the retail level, some retail outlets will either not reopen, or those that are currently open may close down because of low revenue and high operating costs. 7) Distributing flour directly to households will mean that no capital will enter the local value chain beyond the importer/wholesaler, further weakening critical parts of the market chain.

Response 1	Cash allocation to most affected farmers	Cash allocation to most affected farmers
Response 2	Cash for work for farmers to clear irrigation and other farm systems, and crews to clean up markets and businesses	Cash for work for farmers to clear irrigation and other farm systems, and crews to clean up markets and businesses
Response 3	Subsidized transportation linking farms and markets	Public information system for crops and markets
Response 4	Public information system for crops and markets	Vouchers for bakers, retailers and/or vulnerable households
Response 5	Vouchers for retailers to purchase from middlemen	Advocacy with Kyrgyz government to purchase certain volume of wheat from farmers
Response 6	Advocacy with Kyrgyz, Kazakh, Uzbek and Russian governments to reopen borders for trade	
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Response 20		

EMMA RESPONSE COMPARISON		
Market and Country Assessed	Report on the Wheat Flour and Tomato Market Systems: Eastern Libya	Pakistan Flood Response: KPK FINAL REPORT Pakistan Flood Response
Time period of assessment (NOTE, NOT TIME OF PUBLICATION)	May 23—June 7, 2011	7-28 September 2010
Agencies Involved in Carrying Out Assessment (not including funder of assessment if applicable)	WFP, IRC, FAO	ACF, ACTED, CARE, IRC, Oxfam, Save the Children
Gap Analysis	**Wheat:** 1. Markets for staple foods are functioning sufficiently that any wheat or food-oriented international interventions should be market-oriented. 2. There is enough wheat and flour in eastern Libya until approximately the end of July. 3. Households in eastern Libya have not suffered significant disruption of their access to and ability to purchase bread, pasta and couscous. 4. Wheat flour is not widely used at the household level and should not be directly distributed to families. Strategies of directly supporting bakeries with flour, yeast and salt, combined with vouchers for identified vulnerable households (ongoing in Misrata) should be replicated in any contingency planning. Warehousing capacity is only enough for three months of flour consumption. A result of limited storage capacity is reliance on continuous importation, and that fluctuations in the prices of foreign wheat without domestic reserves can be very costly to the PSF. This is a weakness in the market system that undermines food security. 5. The EMMA was not able to collect adequate data on wheat farming outside eastern Libya. It is recommended that further study of the domestic production capacity be undertaken, with the ultimate goal of supporting and increasing the role of local production in the processing and consumption of wheat. **Tomatoes:** 1. The eastern Libya market has large volumes of imported tomatoes, which has kept prices relatively stable and low for consumers. 2. Libyan tomato farmers' market share has been reduced by the rise in imports. 3. The loss of foreign laborers, increased cost of inputs, susceptibility to blight and blocked access to markets in the west has lowered yields and reduced tomato acreage planted in the first two growing cycles 4. Although tomatoes are an important source of income, it is not their only source of income. However, the problems listed in the previous point are also affecting planting and yields for other crops planted by tomato farmers.	1. Around 60% of casual labour who used to work in the agriculture fields (see the seasonal calendar) have lost more than 50% of their expected income. 2. The demand for labour in the agricultural areas depends on farmers being able to cultivate, which is in turn dependant on the state of the land and the irrigation system, thus the situation is very uncertain for normal seasonal labour demand.

Response 1	Voucher program for farmers to purchase seeds, fertilizer, and pesticide	Targeted Cash-based livestock fodder /shelter programmes (fodder & shelter in plains, shelter in mountains)
Response 2	Voucher programs for vulnerable households to purchase Libya-grown tomatoes and other vegetables	Livestock programmes that contribute to the survival of remaining animals
Response 3	Debt relief for farmers via cash grants or direct repayment of outstanding loans	Mixed fodder, timber and fuel woodlots and field edge planting
Response 4	Delivery of bi-laterally donated wheat via cargo ship, for milling and distribution	Quick shelter solutions for livestock in mountains
Response 5	Advocacy for reinstatement of border tariffs for imported fruit and vegetables	Cash grants/vouchers for shelter – incorporating private sector where possible (conditional on training in safer construction and voucher based for quality timber)
Response 6	Cash for work for repair of basic farm supporting infrastructure	Agencies purchase timber outside KPK and/or Pakistan
Response 7	Crop insurance against natural hazards	Increase access to credit for small timber retailers
Response 8	Advocacy for shipping liners to call in Eastern Libya	Incorporate livestock shelter into all/most shelter programming
Response 9	As an IOU: Bi or multilateral provision of wheat via cargo ships for milling and distribution, the value of which is to be paid back by TNC when access to credit is unfrozen	Wheat seed package provision in mountainous areas (and provision or cash grants for inputs and tools)
Response 10		Cash transfer to small farmers in plains and lower uplands for seed and inputs (consider need for 2nd instalment at maize planting time throughout KPK)
Response 11		Cash Transfers for small farmers (for agricultural & L/S inputs)
Response 12		Increase access to credit for small ag input retailers
Response 13		Improved access to mechanisation (through draught power in uplands where access is difficult)
Response 14		Reduction or removal of irrigation channel fees
Response 15		Some room for CFW in uplands for rehabilitation, and consider in two months in plains after initial rehabilitation complete
Response 16		Identify new income streams for women
Response 17		Livestock and poultry support
Response 18		Seed and Fodder stores or grain banks (seed stores at HH level & community seed and fodder storage facilities)
Response 19		Improved Fodder Storage and fodder seed banks
Response 20		Advocacy for import restrictions on timber to be relaxed
Response 21		Mixed timber, fodder and fuel woodlots and field edge planting.

*EMMA did not differentiate whether responses were high, moderate or low feasibility

EMMA RESPONSE COMPARISON	
Market and Country Assessed	Pakistan Flood Response: Wheat Seeds and Flour Final Report
Time period of assessment (NOTE, NOT TIME OF PUBLICATION)	7–28 September 2010
Agencies Involved in Carrying Out Assessment (not including funder of assessment if applicable)	ACF, ACTED, CARE, IRC, Oxfam, Save the Children
Gap Analysis	The stocks of wheat grain for farmers and rural consumers have been lost due to destruction of storage facilities. This has increased household demand for wheat consumption. While there is an available supply of wheat grains at PASSCO and DFC, the main constraint for the poor households is how to access the wheat flour as most of them lost their income. The Government has not yet fixed the price of wheat grains thus the price of flour in general remained the same. The government regulation on quota system as well as the standing ban for importation of wheat is yet to be reviewed by the government. Large millers are facing problems in terms of transporting flour to the rural areas due to the destroyed roads and bridges. Large millers cannot change the price as they are controlled and regulated by the government. Fuel price increase has significantly affected the small millers in rural areas. The volume of milling has also decreased from 600kg per day to around 280kg per day due to the displacement of the rural population, loss of wheat from household storage and difficulty of access by road. Standing crops such as rice, corn, vegetables and fruits have also been damaged, thus creating a very low supply food available in the next coming months.

Response 1	Cash support (cash grants or vouchers) to small farmers in plains and lower uplands of KPK and Punjab and in the camps. Consider 2nd instalment for maize planting
Response 2	Cash for Work (linked to land-preparation or repair of irrigation channels; link to other CFW programs related to livelihoods recovery; link to improvement of road damaged by floods)
Response 3	Direct Food Distributions for IDPs in areas where physical access to market is not possible or is prohibitively difficult.
Response 4	Identify & develop alternative income sources for farmers unable to plant this year
Response 5	Implement assessment of credit available to households and small retailers and role of MFIs and banks in addressing credit needs
Response 6	Advocacy to government on temporary changes in import policies and inter- province trade
Response 7	Donors support short-term and long-term recovery (incl. DRR)
Response 8	Create HH level & community seed and fodder stores (KPK)
Response 9	Provision of wheat seeds to small farmers in Punjab and KPK
Response 10	NGOs to conduct further Needs Assessment on Food Security and Early Recovery
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*EMMA did not differentiate whether responses were high, moderate or low feasibility

EMMA RESPONSE COMPARISON	
Market and Country Assessed	Pakistan Flood Response: Sindh Final Report
Time period of assessment (NOTE, NOT TIME OF PUBLICATION)	7–28 September 2010
Agencies Involved in Carrying Out Assessment (not including funder of assessment if applicable)	ACF, ACTED, CARE, IRC, Oxfam, Save the Children
Gap Analysis	**Wheat:** 1. A significant portion of wheat grain stocks of "rural consumers" (predominantly small and medium farmers) have been lost in the floods. The loss of stored wheat grain in rural areas will result in an increased demand for wheat flour from urban markets in the coming months. 2. Currently, a total of 40,000 MT is available at PASSCO in Sukkur while the District Food Controllers of Sukkur and Shikarpur have stocks of 110,000 MT and 20,000 MT, respectively. While this supply appears adequate to meet the immediate flour demand for the next couple of months, it is not adequate to meet a sustained and increased demand over time. 3. A 17% rise in wheat flour price at the retail level has been noted in Sukkur markets (from PKR 240 to PKR 280 per 10 kg). Increases in wheat price at the retail level are likely to continue, adding an additional financial burden to flood affected households. 4. Standing floodwaters and flood debris (including silt and sand) on agricultural land will likely cause delays in planting of next year's wheat crop, as well as lower yields. Agricultural Labour: 1. Employment opportunities for many agricultural labourers are likely to be reduced in the coming months. Support for longer- term land and irrigation rehabilitation projects is needed. 2. Wage rates, are under threat by the increase in the supply of workers. 3. Some landless labourers are expected to be reluctant to return to their rural origins if no income opportunities or shelters / housing is made available. An increase in rural to urban migration rates is a possible consequence. **Fodder:** 1. Flood damages to standing crops of green fodder and sugar cane are likely to be high, and will exacerbate the annual "fodder gap" that exists in late winter. Losses of stored wheat straw, a low cost fodder material, are also assumed to be significant. 2. Main animal losses were with smaller ruminants and poultry. 3. Roughly half of displaced small-scale livestock owners report having to sell one or two animals to meet emergency needs for cash. 4. Livestock owners who do sell report that they receive 30-50% less than what they would expect to receive. **Bamboo and Timber Poles:** 1. Existing supplies of bamboo & timber poles are NOT adequate to meet the huge need for emergency or transitional shelters in Sindh. 2. The ready availability, low cost, and fibrous composition of manjhandari poles presents an alternative to bamboo for supporting tents, plastic sheeting, or as roof frame for lightweight materials (palm thatch). 3. By the beginning of the year, the ability of the bamboo and manjhandari market to meet the increased shelter demand will depends upon two main variables: the capacity of NGOs to scale up their emergency / transitional shelter support operations; and clarity about the proposed government reconstruction policy, especially in defining what types of construction materials will be recommended. 4. A shift in demand from bamboo and timber pole framed shelters to masonry houses is likely to occur during the first quarter of 2010.

Response 1	Cash Transfers or Food Vouchers to meet emergency needs of most vulnerable households
Response 2	Cash Transfers or Vouchers to small scale livestock owners / vulnerable households to purchase fodder or feed concentrates and other agricultural inputs.
Response 3	Institutional Support for veterinary services and lady livestock organizations for outreach and educational work, focusing on promoting higher milk yields
Response 4	Encourage regional procurement of bamboo / timber poles for emergency and transitional shelter construction for the next three months.
Response 5	Cash for Work for rural livelihood recovery and rehabilitation of agricultural lands, irrigation channels, and roads.
Response 6	District level Food Security Assessments to help inform recovery agenda, and identify potential food insecurity population.
Response 7	Distribution of green fodder seeds and fertilizers for rabi season planting, focusing on crop lands that are rehabilitated too late to permit wheat planting.
Response 8	Cash Grants to support livelihood asset replacement and materials for artisans and skilled crafts people (e.g., carpenters, masons; mechanics).
Response 9	Support for women-focused agricultural opportunities inside and outside of the home (e.g., poultry- raising; livestock re-stocking; kitchen gardens).
Response 10	Discourage use of bamboo / timber poles for wall construction after 3 months to avoid depleting stockpiles.
Response 11	Further research on fired brick market systems produced in local / regional kilns to help identify opportunities to support increased production.
Response 12	A technical working group should be set up within the Emergency Shelter Cluster to provide guidance on vernacular building materials for disaster resistant housing.
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EMMA RESPONSE COMPARISON		
Market and Country Assessed	IMPORTED RICE AND AGRICULTURAL LABOR MARKETS IN LIBERIA – GRAND GEDEH COUNTY	The pig and chicken market Lệ Thủy District, Quảng Bình province, Viet Nam
Time period of assessment (NOTE, NOT TIME OF PUBLICATION)	April 12–20, 2011	11–14th December 2010
Agencies Involved in Carrying Out Assessment (not including funder of assessment if applicable)	Oxfam GB	Oxfam, DMC, UN-Vietnam
Gap Analysis	The market seems to have a limited capacity to respond to the increase of manpower with the influx of refugees. Analysis of farmers' capacity shows that small/medium farmers have benefited from increase of manpower's availability. However, small vulnerable farmers have very few agricultural inputs and a very low capacity to hire manpower for their low land rice farms. Their livelihood will be affected on the long term, with decrease of food self-sufficiency, increase dependence on the market, heavier indebtness and use of negative coping strategies. The study didn't allow estimation on number of refugees who are farming or who are working on rice farms. Some are willing or started to farm on upland or low land, and request agricultural inputs. In addition, their source of income is limited and don't allow them to meet their basic needs and to start livelihood activities.*	**Pig Market:** Out of the total of 25,800 farmers involved in pig breeding, six weeks after the floods around 18,000 of them have not yet recovered and are still in need of support. It was estimated that on average 30% of their livestock has been lost, the majority of which has not yet been fully replaced. It will take six to twelve months in order for the farmer to have their total livestock being restored. So far, farmers in Lệ Thủy have been supported with VET kits and animal shelter materials since the end of November. This support will continue until the end of January 2011. When asked for their preference for support, households opted for cash support. **Chicken Market:** Six weeks after the floods, 8,600 out of a total of 25,900 farmers involved in chicken raising are still in need of support. On average, 30 to 40% of the total number of chickens per household was lost, meaning from 5 to 8 chickens per farmer. Some of the farmers were already able to buy new chickens, but others weren't. Currently, the gap is estimated at around 150,000 chickens. The timeframe for farmers to restock their livestock without any external support is six to nine months. Farmers have a slight preference for chicken support rather than pigs as investment and maintenance costs for pigs is considered higher than for chicken.

Response 1	Unconditional cash transfer for food	Piglet/chicken provision to (female) farmers
Response 2	Food vouchers	Cash grant to (female) farmers
Response 3	Direct food distribution	Cash voucher to affected (female) farmers to buy piglets/chicken from medium-scale farmers
Response 4	Combination of direct food distribution + food vouchers + livelihood cash grant	Micro-credit or loans to medium- scale farmers
Response 5	Labor voucher	Crop support (sweet potatoes, cassava, banana, etc.) for promotion and increase of crop fodder
Response 6	Advocacy towards Government, WFP, UNHCR, and donors to 1/ increase coverage and favour combined approaches in programming (food aid associated to cash transfers) 2/ prioritize also host communities affected by the refugees influx	Advocacy and support for flood- proof animal housing
Response 7	Advocacy towards Government, NGOs and WFP on negative impact on local markets of pure direct food distribution to favour combined type of responses integrating CT modalities	Training VET agencies and farmers
Response 8	Monitoring of imported rice market and agricultural labor as update of present EMMA assessment, to extend to other areas affected by influx of refugees	
Response 9	Market chain analysis for seeds	
Response 10	Market chain analysis for hygiene items (suggested soap, as it is also traditional locally produced)	
Response 11	Assessment of other market systems (suggested market system: cassava, palm oil)	
Response 12	Consultation and collective agreement with concerned actors on payment fees for cash for work	
Response 13	Support local rice production and marketing to increase self sufficiency and reduce external dependency	
Response 14	Advocacy Government rehabilitation construction towards for road and	
Response 15	Support access to credit and micro-credit to small business owners and traders	
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*EMMA did not differentiate whether responses were high, moderate or low feasibility

EMMA RESPONSE COMPARISON	
Market and Country Assessed	Rice Market System, Northern Province, Sri Lanka, March-April 2011
Time period of assessment (NOTE, NOT TIME OF PUBLICATION)	March–April 2011
Agencies Involved in Carrying Out Assessment (not including funder of assessment if applicable)	USAID/OFDA for USAID/Sri Lanka
Gap Analysis	**Paddy farmers:** The profits from paddy cultivation this season (assuming full sale or counting the value of own consumption) would provide for less than one month. Female-headed households, in particular, struggle to afford the necessary labor and inputs, so they may fare even worse. However, this outcome can be improved. If the same farmer can store his/her paddy and wait to sell, or pools resources with other farmers to transport the paddy at low cost to a higher- paying buyer elsewhere, he could earn more. It is clear however that even under very good conditions, paddy farming cannot on its own provide for families' needs, and must be supplemented by other livelihood activities. **Laborers:** At the peak of the season, male laborers can earn 20% above the poverty line for a family of five. However, rates and available hours at other times of the year force laborers to live more than 40% below the poverty line for a typical family. For farmers who labor part-time, the income potential is lower since peak demand for labor is when they must themselves be harvesting. **Rice consumers:** Food availability does not seem to be a major concern. Different types of foodstuffs were widely available in towns and villages throughout the province, although for those living in more rural areas, long and unpredictable transport makes purchasing food difficult. WFP has estimated food assistance needs decreasing steadily, from nearly 19,000 households in February 2011 to less than 10,000 in April, and just 3,292 households by July. The major challenge to northern consumers is economic access to food. As of fall 2010 beneficiaries reported that a majority of their rice consumption was from food aid. Beneficiaries largely responded that they are coping financially, but just barely. People are not currently saving and are afraid of unexpected expenses. Prices for many common types of foods (particularly coconuts, important in local cuisine) have also been rising.

Response 1	Improved storage, based upon farmer preferences (communal or individual; in homes or at the village level; or housed in agricultural at MCPSs)
Response 2	Provision of water pumps/irrigation inputs
Response 3	Land documentation support
Response 4	Diversification into other agricultural activities: livestock rearing; cash crops such as onions, chilli, coconut; and/or other field crops; as appropriate for the locality and as responds to market demand
Response 5	Support to new and fledgling agro-related businesses: village-level rice mills and retail groceries, contract harvesting/machinery rental, etc.
Response 6	Reinvigoration of farmer organizations/associations (through MPCS as appropriate)
Response 7	Irrigation infrastructure rehabilitation
Response 8	Market facilitation to link buyers to progressive private-sector actors
Response 9	Warehouse receipts financing
Response 10	Further investigation, including seed system security analysis (SSSA) or market analysis on alternative and diversified livelihoods
Response 11	Facilitation of higher-value rice production, including of government-certified seed paddy, traditional/ organic varieties, and/or improved branding of rice by area of origin
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EMMA RESPONSE COMPARISON	
Market and Country Assessed	Report for the Abyei Crisis
Time period of assessment (NOTE, NOT TIME OF PUBLICATION)	20th–28th June 2011
Agencies Involved in Carrying Out Assessment (not including funder of assessment if applicable)	Mercy Corps, Norweigan Refugee Council
Gap Analysis	**Iron Roof Sheets:** The closure of roads from Khartoum has completely cut the supply chain from Khartoum to importers, regional traders and local traders. Many regional traders are unable to transport stocked iron sheets. For importers, the closure of northern roads has resulted in them bringing in a second order from China and Dubai (represented on the map by an increase in the thickness of the line connecting the actors). Demand for these iron sheets has increased four fold since the roads closed. These iron sheets from China and Dubai are more expensive and so fewer regional and local traders are able or willing to purchase these iron sheets from importers, meaning that this line is partially disrupted. Regional traders have a slowly depleting stock of iron sheets and most are reluctant to look for alternative supply routes because they believe the roads Khartoum will reopen soon. Most respondents believe that iron sheets from other sources were of an inferior quality and are therefore not in demand. Local traders in the target areas now have no stock of iron sheets and their ability to restock from Wau is lessened by problems in transportation such as high fuel costs and the onset of the rainy season making roads difficult to travel on. The demand for iron sheets for construction of household shelter remains unclear but given that there is no grass for traditional shelter construction several humanitarian agencies are interested in looking into as an option. Aside from demand issues a major obstacle is lack the technical capacity to build with iron sheets as well as the availability of other components necessary for a shelter. **Maloda Metal Sheets:** Demand for malodas has remained steady as it is such a basic necessity for farming. Prior to the crisis it was common for farmers to provide scrap meal to blacksmiths which they would then make into a maloda (this is including the east African hoes distributed by NGOs). It was also found that it is common to have one maloda per household member as all members are expected to work on the land during planting season. NGO distributions rarely take this in to account meaning that most households regularly purchase new malodas in the lead up to the planting season. The assessment therefore found that though a significant number of malodas are distributed by NGOs there continues to be a market for malodas in the target areas. **Okra Seeds:** Seed sellers in Juba have increased their orders for seeds coming from East Africa but unfortunately there is no market link from Juba to our target populations. Regional traders in Wau have continued to purchase their okra seeds from Khartoum suppliers but have them flown in instead of by road. This creates an extra cost which the only seed trader in Wau said he did not pass onto his customers (price remains 16SDG/Kg) because he knew they could not afford it (emphasizing how much of his trade is to local farmers). Before the crisis it is estimated that there were over 5 seed traders in Wau but at the time of the EMMA there was only one, suggesting that they have been significantly affected by the road closures. At the time of the assessment the road from South Darfur to Aweil in Northern Bahr el Gazal reopened in a limited capacity. A regional trader in Aweil confirmed that he is now receiving seeds from Khartoum via the road through Darfur. Most of his seeds are sold to local farmers but a local trader was found in Agok who had just purchased his seeds from Aweil. The local trader made clear that he purposely choose not to stock okra seeds because he knew he could not sell them in the target area because NGOs distribute okra seeds regularly.

Response 1	Vouchers for farmers to purchase okra seeds from local traders
Response 2	Grants to local traders to purchase okra seeds from suppliers
Response 3	Agriculture training in seed selection, quality and handling for farmers
Response 4	Vouchers to households to purchase iron sheets from local traders
Response 5	Construction of storage warehouses for local traders
Response 6	Transportation services for traders
Response 7	Vouchers to beneficiaries to get maloda's from local traders or direct from blacksmiths
Response 8	Provision of grants to blacksmiths to procure new metal sheets
Response 9	Grants to local hardware stores to procure metal sheets from suppliers in Wau
Response 10	Micro franchising of seed traders to promote linkages between Juba and Wau and smaller markets in Warrup State and Abyei
Response 11	Information services for traders, run by traders or by government extension workers
Response 12	Loans to traders to enable procurement of iron sheets from importers in Wau
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EMMA RESPONSE COMPARISON	
Market and Country Assessed	Kenya 2011 Drought Response Wajir County
Time period of assessment (NOTE, NOT TIME OF PUBLICATION)	2nd–6th August 2011
Agencies Involved in Carrying Out Assessment (not including funder of assessment if applicable)	Mercy Corps
Gap Analysis	Communities throughout the county reported a decrease in water and pasture accessibility and in rangeland quality due to reduced rainfall. All interviewed households have lost most if not all of their herds. Many herders are waiting until their animals are on the brink of starvation before selling. A handful of communities reported incidents of human-wildlife conflict as herders fight for their livestock to access limited rangeland and water resources. The main livelihood groups in Wajir are pastoral, with household income primarily coming from livestock sales. Limited water and rangeland has not been able to sustain previous herd sizes, and loss of livestock has resulted in lost income. Without livestock sales, purchases become difficult or impossible. Few in number, the majority of households engaged in farming activities produce staple food crops and pulses for household consumption. Very few have excess produce to sell in local markets this season. Rainfed farms were not planted during the last season. Recent pastoral dropouts who have started farming by irrigating land from shallow wells have limited agricultural knowledge and skills. The short rains are expected to bring kidding, calving, birthing and milk production from remaining livestock that are healthy enough. November is usually the peak livestock trading season, although this will be limited due to reduced herd sizes. Failure of another rainy season will severely limit household capability to recover. According to households, reduced incomes and increasing food prices were identified as the core restrictions to food access. Currently, most poor and very poor households are reliant on food aid, either that is distributed to them directly or shared with them by others. Leaders in multiple locations complained that targeting for food aid has not been updated since the influx of new destitute households. The distribution quantities are also low and monthly distributions usually last around a week when shared with other families and livestock. Compared to six months ago, households are eating lower quantities of food. Halima Issa in Bute had not been able to feed her family for two days when she was interviewed. Fatuma Rashid in Gurar had lost her five-month-old daughter to starvation. Dietary diversity is extremely limited. Households are primarily consuming rice, maize and sorghum. Milk production is low due to the reduced number of animals and animal health, so availability and consumption has reduced over the past six months. Vegetables and fruits are available in larger towns – like Wajir, Habaswein and Bute – but are only consumed by wealthier households and are rarely available in smaller locations. In addition to water and food needs, leaders in Wajir North stressed the importance of improved infrastructure for trade and services. Communities in Wajir South stressed the importance of supporting households to restock their herds.

Response 1	Unconditional cash transfers to meet the emergency needs of vulnerable households
Response 2	Cash-for-work for livelihood recovery and rehabilitation of agricultural land and market infrastructure (e.g. roads, markets)
Response 3	Food vouchers to diversify diets (e.g. vegetables, fruits, milk) of pastoral dropouts and their hosts
Response 4	Transportation subsidies to support traders and retailers to increase and extend supply of vegetables and fruits
Response 5	Fodder vouchers to herders to purchasefodder or supplementary feed for livestock
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*Where a gap analysis was not clearly distinguishable, I used excerpts from the "key findings" sections of reports.
**In cases where 4 feasibility options were presented, I combined categories such as "feasible" and "moderately feasible" for example (since I was instructed to work with three levels of feasibility rather than four).
****Where recommendation tables were grouped separately for different livelihoods/issues, I consolidated for this spreadsheet and grouped all together and then ranked according to feasibility.
*****Where feasibility and timing were addressed simultaneously on a document and/or feasibility itself was not clearly defined, I did not color-code for feasibility.
******In some cases, there was both a response recommendations and response findings table (or something like that), only one of which mentioned feasibility. In these cases, I only used information tied to feasibility.

*EMMA did not differentiate whether responses were high, moderate or low feasibility

ANNEX 3: DG ECHO RESPONSE GUIDELINES

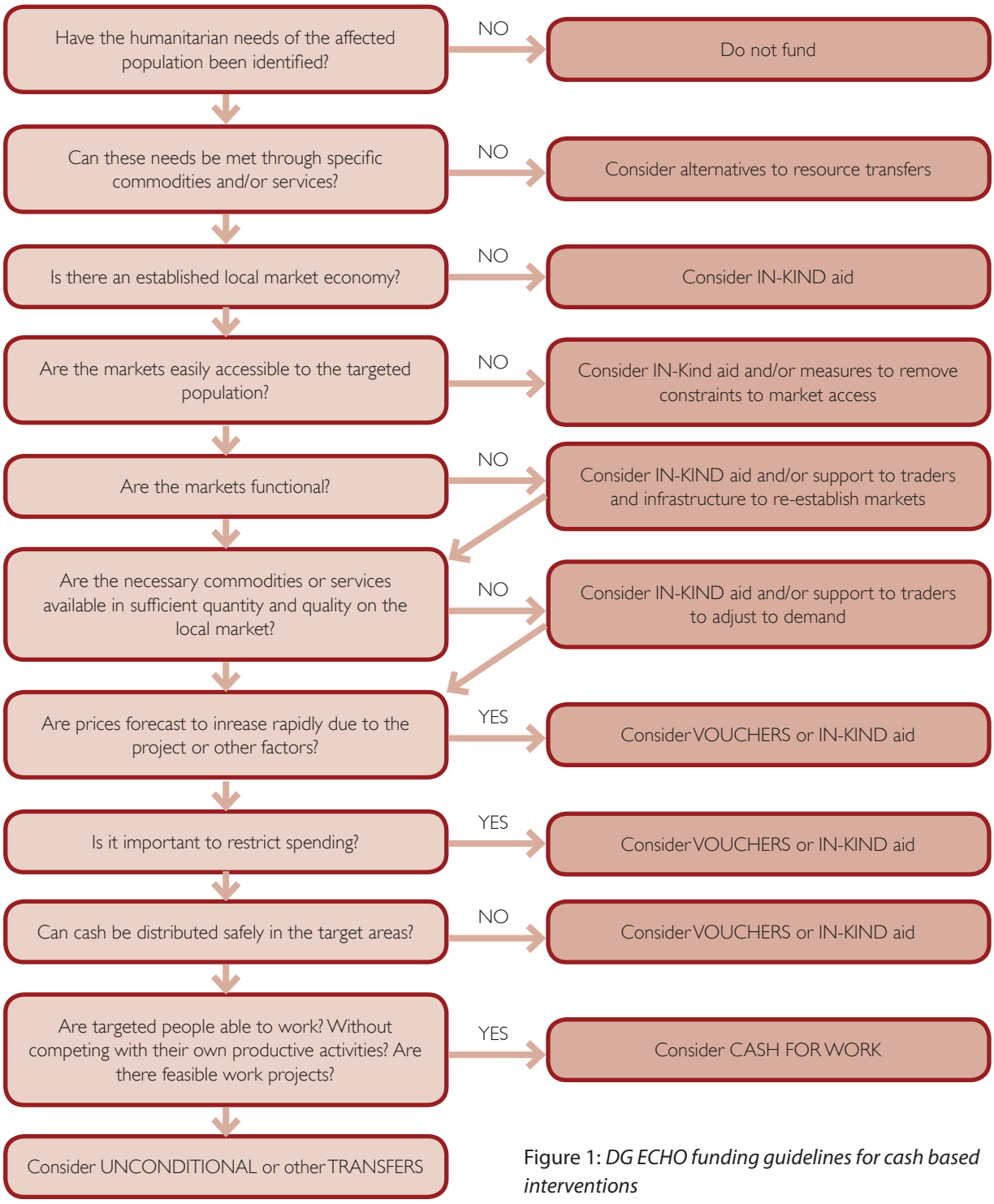

Figure 1: *DG ECHO funding guidelines for cash based interventions*

ANNEX 4: EXPANDED FOOD SECURITY MONITORING INSTITUTIONS

Table 4: *Country locations of expanded food security monitoring locations*

Food Monitoring and Early Warning Systems	Countries Covered	Commodities/markets covered
GIEWS – FAO Global Information and Early Warning System	Algeria, Egypt, Libyan Arab Jamahiriya, Morocco, Tunisia, Benin, Burkina Faso, Cape Verde, Chad, Côte d'Ivoire, Gambia, Ghana, Guinea, Guinea-Bissau, Liberia, Mali, Mauritania, Niger, Nigeria, Senegal, Sierra Leone, Togo, Cameroon, Central African Republic, Congo, Democratic Republic of the Congo, Equatorial Guinea, Gabon, Burundi, Djibouti, Eritrea, Ethiopia, Kenya, Rwanda, Somalia, Sudan, Uganda, United Republic of Tanzania, Angola, Botswana, Lesotho, Madagascar, Malawi, Mauritius, Mozambique, Namibia, South Africa, Swaziland, Zambia, Zimbabwe, Armenia, Azerbaijan, Georgia, Kazakhstan, Kyrgyzstan, Tajikistan, Turkmenistan, Uzbekistan, Bangladesh, Bhutan, Cambodia, China, Democratic People's Republic of Korea, India, Indonesia, Japan, Lao People's Democratic Republic, Malaysia, Maldives, Mongolia, Myanmar, Nepal, Pakistan, Philippines, Republic of Korea, Sri Lanka, Thailand, Timor-Leste, Viet Nam, Afghanistan, Iran (Islamic Republic of), Iraq, Lebanon, Saudi Arabia, Syrian Arab Republic, Turkey, Yemen, Cuba, Dominican Republic, Haiti, Costa Rica, El Salvador, Guatemala, Honduras, Mexico, Nicaragua, Panama, Argentina, Bolivia, Brazil, Chile, Colombia, Ecuador, Guyana, Paraguay, Peru, Uruguay, Venezuela, Belarus, Republic of Moldova, Russian Federation, Ukraine	n/a (general guidelines for many markets/ commodities provided)

FEWS Net – USAID Famine Early Warning System	Afghanistan, Tajikistan, Haiti, El Salvador, Guatemala, Honduras, Nicaragua, Burkina Faso, Chad, Liberia, Mali, Mauritania, Niger, Nigeria, Senegal, Sierra Leone, Burundi, Djibouti, Ethiopia, Kenya, Rwanda, Somalia, Sudan, South Sudan, Tanzania, Uganda, Malawi, Mozambique, Zambia, Zimbabwe, Yemen	Bananas, beans, cassava, cooking oil, cowpea, fish, groundnut, livestock, maize, millet, palm oil, plantain/banana/matoke, potato, pulses, rice, rice (imported), sorghum, sorghum millet, sweet potato, teff mix, tubers, wheat, yams
GMFS – Global Monitoring for Food security	**national partners:** Senegal, Niger, Mali, Sudan, Ethiopia, Kenya, Mozambique, Malawi and Zimbabwe; **vegetation productivity measured in:** Algeria, Angola, Benin, Botswana, Burkina Faso, Burundi, Cameroon, Cape Verde, Central African Republic, Chad, Comoros, Congo, Congo (DRC), Djibouti, Egypt, Equatorial Guinea, Eritrea, Ethiopia, Gabon, Gambia, Ghana, Guinea, Guinea-Bissau, Ivory Coast, Kenya, Lesotho, Liberia, Libya, Madagascar, Malawi, Mali, Mauritania, Mauritius, Morocco, Mozambique, Namibia, Niger, Nigeria, Reunion, Rwanda, Sao Tome & Principe, Senegal, Seychelles, Sierra Leone, Somalia, South Africa, Sudan, Swaziland, Tanzania, Togo, Tunisia, Uganda, Zambia, Zimbabwe	not specified
VAM – World Food Programme Vulnerability Analysis and Mapping	Afghanistan, Bangladesh, Cambodia, India, Indonesia, Laos, Myanmar, Nepal, Pakistan, Philippines, Sri Lanka, Benin, Burkina Faso, Cape Verde, Central African Republic, Chad, Cote d'Ivoire, Gambia, Ghana, Guinea, Guinea Bissau, Liberia, Mali, Mauritania, Niger, Senegal, Sierra Leone, Burundi, Congo, Congo DRC, Djibouti, Ethiopia, Kenya, Rwanda, Somalia, South Sudan, Tanzania, Uganda, Lesotho, Madagascar, Malawi, Mozambique, Swaziland, Zambia, Zimbabwe, Bolivia, Colombia, Costa Rice, Dominican Republic, Ecuador, El Salvador, Guatemala, Haiti, Honduras, Nicaragua, Panama, Peru, Armenia, Azerbaijan, Egypt, Georgia, Jordan, Kyrgyzstan, Occupied Palestinian Territories, Tajikistan, Sudan	not clearly listed
MARS FOOD – Monitoring Agriculture with Remote Sensing (EC/JRC)	EU. Regarding food security, cooperates with other initiatives to monitor food insecure areas outside EU. Many special bulletins produced on areas like Niger and Sudan on case by case basis.	wheat, barley, rice, maize, rapeseed, sunflower, sugar beet, potato and pastures
EARS – Environmental Analysis and Remote Sensing	Global	potato, wheat, maize, sorghum, millet, coffee

AP3A – Alerte Précoce et Prévision des Productions Agricoles	Burkina Faso, Cape Verde, Gambia, Guinea Bissau, Mali, Mauritania, Niger, Senegal, Chad	not clearly listed
Agrhymet	Burkina Faso, Cape Verde, Gambia, Guinea Bissau, Mali, Mauritania, Niger, Senegal, Chad	not clearly listed
SADC – Regional South African Early Warning System for Food Security	Angola, Botswana, DRC, Lesotho, Madagascar, Malawi, Mauritius, Mozambique, Namibia, Swaziland, Tanzania, Zambia, Zimbabwe	includes maize and maize flour, rice, cassava, sorghum, millet, groundnuts, soya, fruits, vegetables, potato and roots, coffee, wheat and wheat flour, edible oil and oil seed, tobacco, cotton, live animals, beef, chicken, dairy, spices, sugar, peas
IGAD Climate Change Prediction and Applications Centre (ICPAC)	Burundi, Djibouti, Eritrea, Ethiopia, Kenya, Rwanda, Sudan, Somalia, Tanzania, Uganda	Monitors climate

ANNEX 5: INTERVIEW LIST

1. Emma Delo, ICRC
2. Emily Henderson, Oxfam
3. Jessica Saulle, Oxfam
4. Miles Murray, Save the Children
5. Erin Lentz, Cornell
6. Megan McGlinchy, Catholic Relief Services
7. Issa Sanogo, World Food Programme
8. Christopher Hillbruner, FEWS NET
9. Benjamin Watkins, formerly WFP
10. Fabian Tondel, FEWS NET
11. Blake Stabler, FEWS NET
12. Jude Powell, Consultant conducting Review of EMMAs
13. Karri Byrne, IRC
14. Sigrid Kuhlke, ECHO
15. Sara McHattie, ECHO
16. Devrig Velly, ECHO
17. Laura Meissner, USAID
18. Alessandro De Matteis
19. Ben Mountfield, Independent Consultant
20. Nick Maunder, formerly ECHO
21. Lili Mohiddin, Oxfam

ANNEX 6: BIBLIOGRAPHY

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MARKET ANALYSIS IN EMERGENCIES

Despite the number of tools available and innovations in programme design, there are a number of challenges for the humanitarian assistance community when conducting market analysis to inform broader programme planning in crises. This document represents the first phase of analysis by the Cash Learning Partnership to understand how to strengthen interventions by using market analysis and what is needed to conduct market analysis well. By examining the capacity and current thinking within the sector this report discusses how we can improve the quality of market analysis and its impact on humanitarian programmes.

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