Joint Rapid Assessment of Markets (JRAM)
Ana, West Anbar - Iraq

November 2017

Introduction

Market location – Ana, West Anbar:

- Ana was retaken by Iraqi Security Forces (ISF) in **September 2017**, after being held by the group known as the Islamic State of Iraq and the Levant (ISIL) since 2014.

Information gaps:

- The assessment aimed to find out 1) the **impact the crisis had** on the market 2) the current **price and availability of goods** 3) **traders' confidence** in their ability to respond to increased demand.

Coordination structure:

- The JRAM was led by the **Cash Working Group** (CWG), with REACH providing technical support and CWG partners conducting data collection.

Data Collection Partners

Data collection was carried out by **Mercy Corps** and **the International Rescue Committee (IRC):**

Ana, West Anbar – Iraq

Methodology

Dates of data collection:

- Data collection took place between **22-23 November 2017.**

Tool:

- Data was collected using a kobo survey.

Respondents:

- In total**, 68 Key Informants (KIs)** were surveyed, including **36 consumer KIs, 21 retailer KIs** and **11 wholesaler KIs.**

Limitations:

- The findings from this assessment are not statistically representative and should be **considered indicative only.**

Preliminary findings – Overview

- This presentation focuses on **core indicators** that are deemed essential to **judging market health and the feasibility of cash-based programming.**
- The preliminary analysis presented here is partially based on the **rapid decision making indicator tool** developed by the Cash Working Group (CWG).

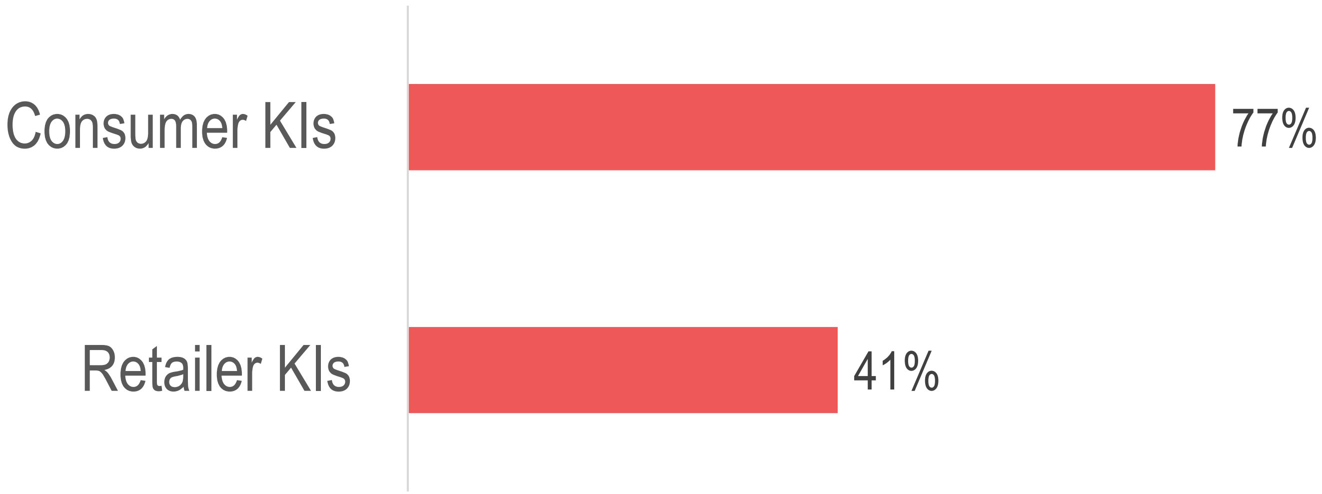
The presentation covers:

1. Overall market health
2. Damage
3. Market flexibility
4. Access and security
5. Response capacity

Market Health – Shops Trading

- **Retailer KIs** reported **an average of 41% of shops** to be trading in the market place.
- **Consumer KIs** reported **an average of 77% of shops** to be trading in the market place.

Figure 1: Average percentage of shops reported trading by consumer and retailer KIs



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Market health - Assessed Items

Lentils
Sugar
Vegetable oil
Wheat flour
Rice
Eggs
Tomatoes
Cucumber

Onions
Potatoes
Toothpaste
Bath soap
Sanitary napkins
Disinfectant solution
Butane
Kerosene

Market Health – Shortages

For the items they sold, retailer and wholesaler KIs reported **no shortages in the past 30 days**.

- However, **butane and kerosene** were not sold by retailer and wholesaler KIs surveyed, and **sanitary napkins** were not sold by the retailer KIs surveyed.

For consumer KIs, all items are reportedly available in the market place, with the exception of **butane** and **kerosene.**

- **92% of consumer KIs** reported that **butane was not available** and **72%** of consumer KIs reported that **kerosene was not available.**

Market Health - Prices

92% of consumer KIs reported that prices have reduced since the departure of so-called ISIL (September 2017).

- Overall prices reported by retailer KIs were **7% more expensive in Ana** when compared to the national average for October 2017 (Iraq JPMI, October 2017).
- **9 of 12 assessed items** for which there is comparable data **were more expensive in Ana district**, including all Non-Food Items (NFIs).

Market Health - Prices

Table 1: Average retailer prices of comparable food and NFIs in Ana and nationally in October 2017 (excluding sanitary napkins, cucumber, tomatoes and potatoes)

Item	Ana (IQD)	National (IQD)
Lentils (1kg)	1,427	1,581
Rice (1kg)	1,077	1,185
Sugar (1kg)	1,017	990
Vegetable Oil (1L)	1,538	1,455
Wheat Flour (1kg)	808	774
Butane (1 cannister)	8,714	7,678
Kerosene (1L)	491	780
Bath Soap 1 bar (125g)	336	304
Toothpaste (75ml)	1,154	1,046
Disinfectant Sol. (1L)	1,167	1,080
Eggs (30)	4,063	3,662
Onions (1kg)	929	732

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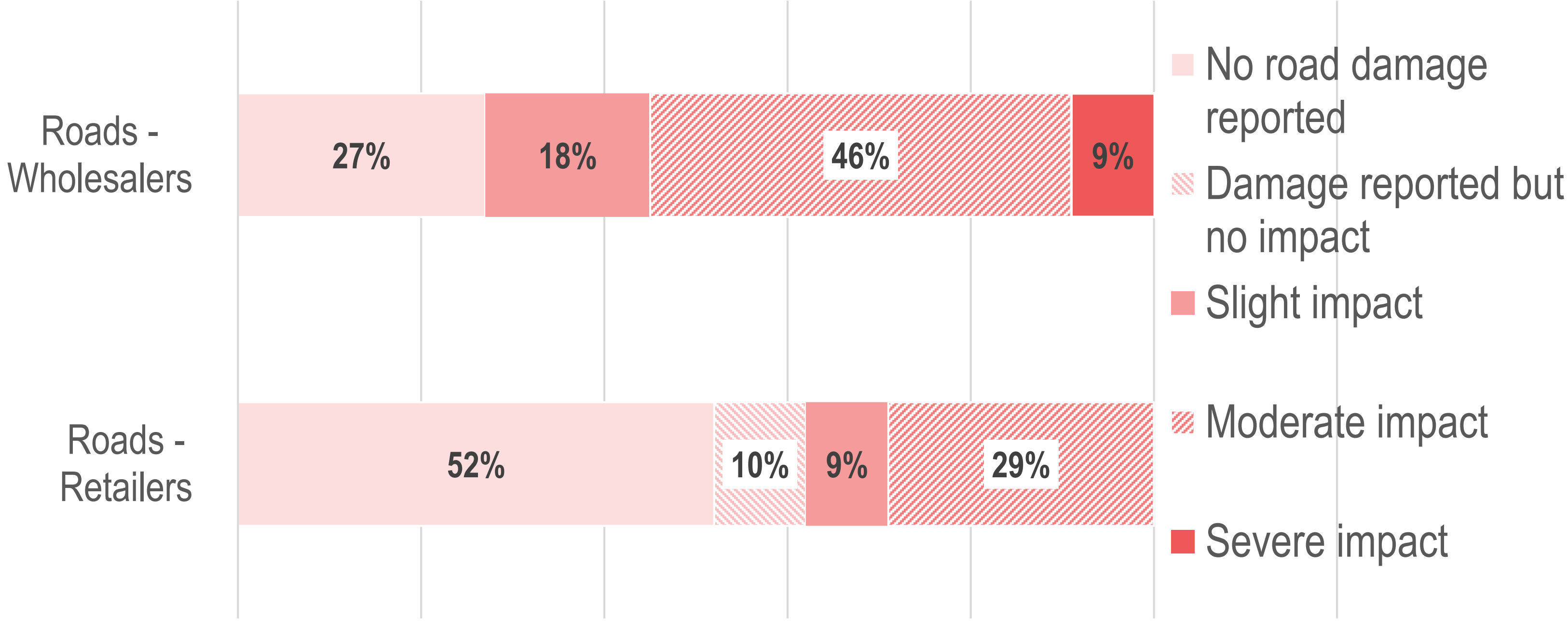
Road Infrastructure

- Over half of retailers did not report damage to road infrastructure.
- Road infrastructure damage has a greater impact on wholesalers than retailers.
  - This is likely due to their business relying on the movement of goods over greater distances.

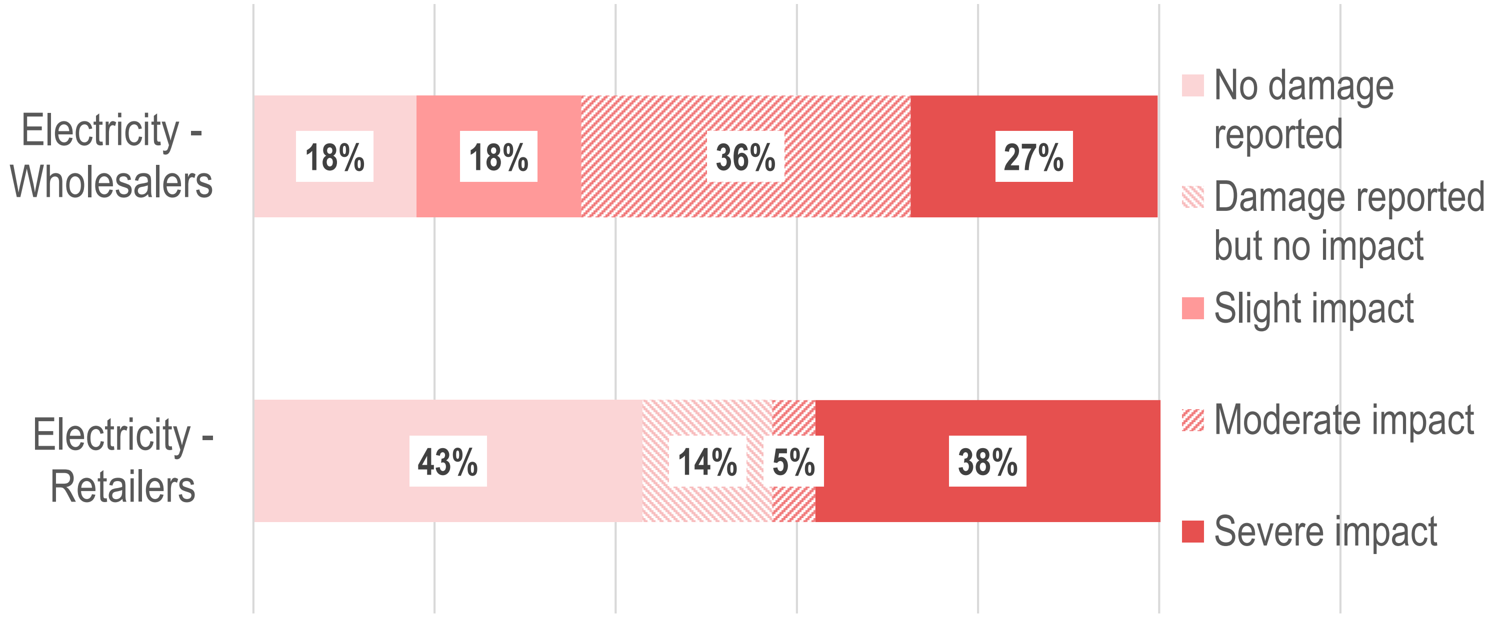
Figure 2: The impact of road infrastructure damage as reported by retailer and wholesaler KIs



Damage – Electricity Infrastructure

- Damage to electricity infrastructure has a greater impact than damage to road infrastructure for both retailer and wholesaler KIs.
- Electricity infrastructure damage has a greater impact on wholesalers than retailers.
    - This likely due to wholesalers needing to refrigerate a greater quantity of goods for a longer period of time.

Figure 3: The impact of electricity infrastructure damage as reported by retailer and wholesaler KIs.

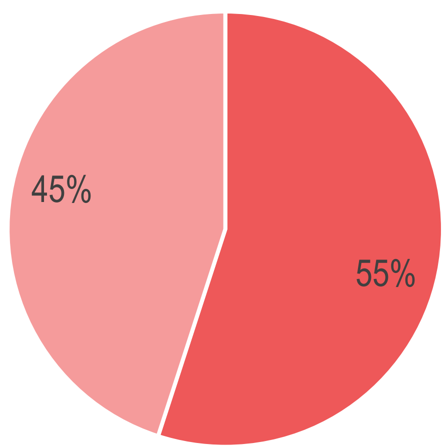


Damage – Property

55% of wholesaler KIs reported that storage capacity has been **negatively effected by the crisis**:

- In their explanations they stated that their **storage facilities were damaged or destroyed during recent armed clashes.**

Figure 4: Percentage of wholesalers reporting that the crisis had a negative impact on their storage capacity.



Market Flexibility

The table shows the reported change in the number of suppliers between before the crisis (mid-2014) and the time of the assessment.

The most significant findings are the reported **reduction in retailer KIs' wholesalers** and the reported **increase in wholesaler KIs' suppliers**

Table 3: Reported change in suppliers since before the crisis (mid-2014)

Reported change	Retailers	Wholesalers
Increase	14%	64%
Decrease	71%	9%
No change	10%	27%
Do not know	5%	0%

The **location of retailer's wholesalers do no appear to have been affected** by the crisis as reported by retailer KIs. Most retailers' wholesaler continue to be located in the market place (Ana), which may explain why they decreased.

Wholesaler KIs reported having a high average number of suppliers – **3.**

Access and Security

- **97% of consumer KIs** reported that there are **no physical barriers to market access.**
- In addition, **97% of consumers KIs** reported that **security issues do not prevent them** from accessing the market place.
- Security issues were **more widely reported** by retailer and wholesaler KIs, however:
  - Most notably, **38% of retailer and 45% of wholesaler** KIs reported **checkpoints** as a security issues that impacts on business.

Security does appear to impact on the movement of goods, but it does not – on the whole – appear to prevent consumers from going to the market place.

Response Capacity

- Retailer and wholesaler KIs were asked if they could respond to a 50% and 100% surge in demand by increasing supply.
  - Butane and kerosene for retailer and wholesalers, and sanitary napkins for retailers, are not included in this calculation as no KIs sold them.
- The findings reveal a **very high level of confidence among both KI groups,** despite the challenges identified elsewhere in the assessment.

Table 4: Average response capacity for 50% and 100% as reported by retailer and wholesaler KIs.

	Responding by 50%	Responding by 100%
Retailers	100%	97%
Wholesalers	98%	99%

Summary

Market Health:

- A **low number of shops are reported to be trading by retailers.**
- All items appear to be available, except for **sanitary napkins**, **kerosene** and **butane**.
- Prices are only **slightly more expensive (7%) than the national average** for October.

Infrastructural damage:

- A significant percentage of retailer and wholesaler KIs reported that **damage to road and electricity infrastructure** had a severe-to-moderate impact on their business.
- A higher percentage of wholesalers than retailers KIs are reportedly affected by this infrastructural damage.

Summary

Market flexibility:

- **71% of retailers reported that their number of suppliers had reduced** since before the crisis.
- The crisis does not appear to have changed the location of suppliers and wholesaler.

Access and Security:

- **Almost all consumers** reported that **physical and security barriers do not prevent them** from accessing the market place.
- **Retailer (38%)** and **wholesaler (45%)** KIs reported **check point** as a barrier that impacted on business

Response capacity:

- Both retailer and wholesaler KIs had **a high confidence** in their ability to respond to demand by 50% and 100%.

Questions?

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