MARKET ASSESSMENT

NYARUGUSU REFUGEE CAMP, UNITED REPUBLIC OF TANZANIA

This Market Assessment Report assesses the structure, functionality and performance of markets in Kasulu district, United Republic of Tanzania. The report specifically assesses the Nyarugusu Refugee Camp's Common Market. The report is structured to facilitate its use for humanitarian cash based transfers' (CBT) food assistance interventions. Refer to the CBT Response Options Report for CBT specific information.

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Cash Based Transfer Market Assessment: May 2016

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Acronyms

CBT	Cash Based Transfer
C&V	Cash and Vouchers
CO	Country Office
CPI	Consumer Price Index
DALDO	District Agriculture and Livestock Department Officer
DAICO	District Agriculture, Irrigation and Cooperatives Officer
DRC	Democratic Republic of Congo
FAO	United Nations Food and Agriculture Organization
FCS	Food Consumption Score
GDP	Gross Domestic Product
Ha	Hectares
IMF	International Monetary Fund
Kg	Kilograms
KCal	Kilocalorie
Km	Kilometers
JAM	Joint Assessment Mission
Lt	Litres
M	Meters
MDG	Millennium Development Goal
Mha	Million Hectares
MT	Metric Tonne
NA	Not Available
NBS	National Bureau of Statistics
NCM	Nyarugusu Common Market
NFI	Non Food Item
NGO	Non-Governmental Organization
NVS	Nutritional Value Score
P4P	Purchase for Progress – WFP Project
PDM	Post-Distribution Monitoring
RBJ	Regional Bureau Johannesburg
RUSF	Ready-to-Use Supplementary Food
RVAC	Regional Vulnerability Assessment Committee
RVAA	Regional Vulnerability Assessment and Analysis
SACCOS	Savings and Credit Cooperative Society
SAFEX	South African Foreign Exchange
SMART	Standardized Monitoring and Assessment of Relief and Transitions
TCCIA	Tanzania Chamber of Commerce, Industry and Agriculture
TZS	Tanzanian Shillings
US $	United States Dollars
UN	United Nations
UNHCR	United Nations High Commissioner for Refugees
VAM	Vulnerability Analysis and Mapping Unit of WFP
WFP	United Nations World Food Programme

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Cover Photo: Mdathiru Abubakar – Kasulu, United Republic of Tanzania

Key Findings:

Southern Africa's 2015-16 regional harvest is expected to be well below the regional average. South Africa, the region's biggest producer of maize is reporting that it will have to import 3.65 million tonnes of maize in 2016-17. Numerous other countries in the region have reported a state of drought emergency. The region is expected to have an overall maize deficit of 5.1 million tonnes and an overall cereal deficit of 9.3 million tonnes for the 2016-17 marketing season up from 7.8 million tonnes deficit for the 2015-16 marketing season.

In 2015-16 Tanzania expects to produce 123 per cent above its national cereal requirement. This follows a 928,000 tonnes surplus of cereals in 2014-15. Tanzania has been the only country other than Zambia to record a surplus harvest in southern Africa for both years. Most of Tanzania's 30 Regions are expected to register average to above average harvests in 2015-16. However, a total of 43 out of nearly 140 districts in Tanzania are expected to experience pockets of food insecurity in 2016-17. The Government of Tanzania will release its official crop forecast figures in later in 2016.

Tanzania's Kasulu district in north-western Tanzania is hosting 137,843 refugees, of which 68,843 are DRC nationals and 69,000 are Burundians. WFP is considering introducing market based food assistance modalities to support the refugees' food security needs. A shift to market based modalities would increase the refugees' food diversity, would provide them with fresh food and would be in-line with refugee demands for receiving food assistance through cash and/or vouchers. Fortified foods such as super cereal plus and fortified cooking oil would continue to be provided in-kind due to the malnutrition levels found in the camp and due to the fortified food's rich nutrient properties which are not found in local markets surrounding the Nyarugusu Refugee Camp.

On average, Kasulu district as a whole produces enough food on an annual basis to cater for refugees' food requirements. However, the district and surrounding region are beset by bad quality roads, poor storage facilities and informal markets. Specifically, the refugees' limited ability to leave the refugee camp and the poor state of infrastructure of the Nyarugusu Refugee Camp's main market are limiting the refugees' access to diversified food at regional average prices.

In general, food prices in Nyarugusu Refugee Camp are higher than in surrounding markets. Only commodities which WFP distributes to refugees (maize and beans) are cheaper in Nyarugusu Refugee Camp than in the surrounding markets.

Traders in Kasulu district have high trade flows as demand for food (especially maize grain and cassava) comes from as far away as South Sudan. Of the district's surplus food, 82 per cent is traded with neighbouring countries (Burundi, Rwanda, Uganda, South Sudan and DRC) while 18 per cent is traded inside Tanzania.

Tanzania generally experiences seasonally fluctuating food prices. The wholesale price of maize grain on average fluctuates around 17 per cent from its annual national average price. Wholesale maize grain prices in Tanzania fell during the post-harvest period but have been increasing again since July 2016, two to three months earlier than usual. In July 2016, Tanzania's national wholesale white maize price stood 32 per cent above its five year average level (up from 22 per cent in June 2016) and will likely continue to increase until March 2017 as the lean season takes hold in southern Africa.

Tanzania is a trade hub for eastern and central Africa. The country has well-established trade routes which it is developing further with large infrastructural projects. The food supply chain in the country is strong with numerous actors trading between markets. Wholesale white maize grain prices across different markets surrounding Kasulu and Kigoma are correlating between 0.6 – 0.8 out

of 1, showing some level of market integration. Most traders in Kasulu can restock within 1 to 3 days and they have ample storage capacity. Market access though is problematic with only 40 per cent of roads in good gravel condition and no roads tarmacked.

Executive Summary:

Following political instability in Burundi in 2015, the Nyarugusu Refugee Camp has more than doubled in number of refugees requiring accommodation and food assistance, from around 60,000 people to 137,843 refugees (68,843 DRC nationals and 69,000 Burundians) in the space of a few months. Currently the refugees residing in the camp are receiving WFP general food distributions. However with the late 2015 decision by the Tanzania government to allow the establishment of a formal market in the refugee camp, food related cash based transfer (CBT) interventions have also become a reality.

In early 2016, WFP Tanzania CO requested WFP RBJ to support the CO with a market assessment to determine the functionality of food market systems (for maize, pulses and cooking oil) in Kasulu District (Kigoma Region located in North-Western Tanzania). The findings of the assessment are intended to inform the design and implementation of humanitarian assistance programmes in the Nyarugusu Refugee Camp where WFP is considering changing its food assistance modality from in-kind to a CBT style modality.

In addition to assessing the Nyarugusu Refugee Camp's official market known as 'Nyarugusu Common Market' (NCM from here forth in the report), the market assessment assessed 9 other markets in Kasulu, 3 markets in Kigoma and visited an oil refinery in Dar es Salaam. The market assessment employed both secondary and primary data sources. Primary data was collected using structured trader and key market informant questionnaires. On average 2 questionnaires were collected by trader type (wholesaler, medium trader and retailer) by market for a total of 83 questionnaires covering issues of volumes of food traded, trader's storage capacity, food source, food prices, key trade constraints affecting traders, security and the effects of seasonality on trade. In every market key informant interviews were also held with the market chief and/or the market's revenue collector.

Key stakeholders and peer humanitarian organizations such as UNHCR representatives (both in the Sub-Office in Kasulu as well as the Country Office (CO) in Dar es Salaam, Oxfam GB representative in Kasulu, WFP Sub-Office Representative, the Nyarugusu Camp Commandant from Tanzania's Ministry of Home Affairs and representatives from the Tanzania Chamber of Commerce, Industry and Agriculture (TCCIA) in Kigoma, were also met with. Eight focus group discussions with refugees (DRC and Burundian) were also conducted to better understand the refugees' intervention modality preference.

Food security

Southern Africa is experiencing an unprecedented El Niño phenomenon which manifested itself with two consecutive years of extended dry spells, erratic rains and overall drought conditions. Tanzania however, does not seem to have been as severely affected by the drought as other countries in southern Africa. In 2014-15, Tanzania registered a cereal harvest surplus of 928,000 tonnes, the only country in the region to do so apart from Zambia and the country furthermore expects to produce 123 per cent above its national cereal requirement in 2015-16[2]. Specifically, Kasulu district in North-Western Tanzania has been experiencing average increases in production levels for various staple commodities of between 9 – 37 per cent annually since 2009. In a typical year, production levels in

[2] National Crop Forecast figures will be released in the coming months.

the District are adequate to support the food needs of both the local community as well as the food needs of refugees' accommodated in Nyarugusu Refugee Camp, with ample food to spare.

Nevertheless, the unfavorable climatic conditions experienced in the region between 2014 and 2016 are expected to have an impact on Tanzania's food security for the 2016-17 marketing season. In 2014-15, SADC reported a 7.8 million tonnes cereal deficit while preliminary data from the 2015-16 SADC RVAA crop forecast, has highlighted southern Africa's cereal deficit at 9.3 million tonnes[3]. South Africa alone, the world's tenth largest (in terms of volume) producer of maize and southern Africa's largest maize producer, has estimated that it will have to import 3.8 million tonnes[4] of maize in 2016-17. Southern Africa's production deficits will likely be placing increased demand on Tanzania's food production.

Neighbouring Burundi, which is going through social and political unrest, is experiencing food prices which are above their five-year-average levels for the time of year. The country is reportedly importing large quantities of maize, cassava and beans from a number of neighbouring countries, Tanzania's Kasulu District being one of them, to satisfy the country's deficit which on average is estimated between 350,000 – 450,000 tonnes of cereal annually. DRC, which shares its Eastern border with Tanzania, has been experiencing two decades-long of political instability which is affecting DRC's eastern region food security and as a result is absorbing food imports from Tanzania, specifically from the close-by Kasulu district. With the political, social and economic turmoil not expected to improve in the region in the coming months, the likely scenario is that food trade between Tanzania and its neighbouring countries: Burundi, DRC, Rwanda, Uganda and South Sudan, will continue unabated in 2016-17.

Feasibility of CBT in the Nyarugusu Refugee Camp

WFP is aiming to start a CBT intervention with a pilot covering 10,000 refugees. If successful, WFP is aiming to scale-up the intervention to cover more refugees in the Camp. Such a step-by-step process is recommended to test out NCM's ability to provide a variety of local foods at good quality standard at an average local price.

Focus group discussions with eight different refugee groups and key informant interviews with the Camp Commandant outlined that even though refugees do prefer a switch to a CBT food assistance style intervention, refugees would want/require WFP to keep providing its fortified foods. Such as super cereal (SC), super cereal plus (SC+) and fortified cooking oil as the refugees acknowledge the importance of these foods to improve their nutrition levels and that of their children in addition to the fact that these foods or their equivalents would be difficult if not impossible to find in NCM and the Camp's surrounding markets.

Increased trade competition is not the only constraint affecting a possible CBT in Nyarugusu's Refugee Camp. Tanzanian Government's regulation restricting refugees' exit from refugee camps, is limiting the Nyarugusu refugees' access to food commodities in markets outside the Camp. Refugees' limited movement outside their refugee camp is possibly also affecting food prices in Nyarugusu's Common Market (NCM) which tend to be higher than in surrounding markets. Moreover, NCM's basic market infrastructure limits trade volumes and affects hygiene in the market. For example during rains which are usually heavy in the region, water leaks through the market's roof, potentially spoiling the food kept there. The market does not have proper food storage facilities hereby limiting the market's trade volume capacity. Furthermore, the market which

[3] Figures are missing data from DRC, Madagascar, Mauritius, Seychelles and Tanzania

[4] 1.1 million tonnes white maize and 2.7 million tonnes yellow maize – Information from South Africa's National Crop Estimate Committee (June 2016)

is found downslope from the centre of the refugee camp, lacks even the most basic of drainage systems, which with rains, leads to 30cm high levels of run-off water flooding NCM. With water stagnating in NCM due to the poor drainage system, close-by public latrines flood, lifting-up and spreading excrement through-out the market, hereby, raising sanitation concerns and possibly increasing incidents of cholera and other water-borne disease outbreaks.

NCM's market constraints are important issues affecting the ability of traders in the market to increase their trade volumes, commodity variety, as well as to provide foods of decent quality standard. The market constraints also increase the level of risk borne by the traders who are not sure of selling their commodities, if they get spoilt and also pushing-up prices due to limited competition. Good Neighbours (a local NGO), is already in the process of hiring a local firm to repair the market roof, build adequate storage facilities and improve NCM's drainage system. These are important steps to ensure the market is suitable to provide refugees with their food needs and are a necessary requirement before a CBT intervention can be undertaken.

Layout of the Report:

This report is organized as follows: The **first section** outlines the objective and methodology of the study, while the **second section** provides a general introduction to Tanzania, covering the country's macro-economic indicators, agriculture sector and food security context. **Section three** covers Kasulu and Nyarugusu Refugee Camp's market structure. **Section four** covers food availability in Kasulu while **section five** examines food access including price trend analyses in the district. **Section six** looks at market constraints affecting traders in Kasulu and **section seven** and **eight** respectively provide the conclusions and references to the study. **Section nine** is the annex providing added useful information to the Report.

Section 1: Objectives of the Study and Methodology

1.1: Rationale for the Market Assessment

For more than 40 years, Tanzania has hosted refugees from neighbouring countries, notably Rwanda, Burundi and the DRC. Improved security conditions in Rwanda and Burundi in recent years has facilitated orderly return of the majority of these refugees and subsequent closure of Rwandese and Burundian camps and consolidation of Congolese camps in Tanzania. Until recently, there was only one camp remaining in operation (Nyarugusu Refugee Camp) hosting a population of approximately 70,000 refugees from DRC and a small caseload of Burundian refugees considered to still need international protection. Renewed insecurities in Burundi in the first half of 2015 though, triggered by election processes, saw a large influx of over 120,000 Burundian refugees into Tanzania and with the subsequent re-opening of two camps; Nduta and Mtendeli in Kibondo district.

Currently WFP Tanzania Country Office supports approximately 205,000 Congolese and Burundian refugees across the country through a Protracted Relief and Recovery Operation (PRRO) entitled 'Food Assistance to Refugees in North-Western Tanzania' by providing food transfers that meet a minimum daily energy requirement of 2,100 kilocalories per person. Government restrictions of refugees' movement outside the Camp as well as their engagement in economic activities, has meant that refugees have been mainly depending on WFP rations for their food security with limited capacity to diversify their consumption patterns.

Several initiatives have been taken to address the need for livelihood diversification in the Camp, but most often these have been limited by Government restrictions. In a recent development, the Government of Tanzania is now supporting cash based transfer (CBT) initiatives and has re-opened the common market in the Nyarugusu Refugee Camp to facilitate refugees' access to local food. This has placed new impetus on the possibility of switching intervention modality from traditional in-kind donation of food to CBT modalities.

WFP Country Office commissioned two assessments in Nyarugusu Refugee Camp, one in November 2013[5] to explore the feasibility of implementing CBT in the camp by looking at the refugee households' preferences, market systems and networks as well as the district agricultural production capacity to meet the needs of the host community and refugees. The assessment concluded there was potential to implement CBT in Nyarugusu's Refugee Camp based on the district agricultural production capacity, market performance and conduct.

The January 2015[6] assessment laid-out an implementation plan for a market-based operation in Nyarugusu's Refugee Camp building on the 2013 assessment and highlighted prevailing local conditions that could facilitate or hinder a CBT intervention. The assessment reviewed different solutions available in the country to facilitate CBT aiming at proposing different transfer modalities based on the identified selection criteria and weight.

However, following the new influx of Burundian refugees (Since April 2015 onwards), the CO with support from WFP's Regional Bureau in Johannesburg (RBJ) found the need to undertake a further comprehensive assessment which would validate the findings of both the November 2013 and January 2015 assessments, update analysis incorporating the new immigration dynamics and consolidate findings to facilitate smooth piloting of a CBT intervention pilot of around 10,000 vulnerable beneficiaries in July 2016. The assessment went further to update regional agriculture

[5] Murray. M., (2014), 'Nyarugusu Cash & Voucher Feasibility Study' – United Nations World Food Programme
[6] Ernesto. G., (2015), '*Mission Report: C&V intervention for Tanzania's PRRO 200603'* – United Nations World Food Programme

production figures and food prices as well as to analyze and gain "actionable understanding" of markets' supply chains in Kasulu district and Kigoma region as a whole. The current report is to inform transfer modality selection and delivery mechanism, supply chain/retailer strategy and operational risk reduction in light of the increased refugee case-load.

1.2: Market Assessment Methodology

The overall objective of the market assessment was to validate if a CBT intervention is possible in the Nyarugusu Refugee Camp market without leading to undesired side-effects. The main objective was broken down into the following sub-objectives:

Market structure	Identify the key actors and institutions as well as assessing the supply chain for cereals (maize and rice), tubers (cassava), pulses (sugar beans) and vegetable oil
Availability of food items	Analyse current and projected availability of cereals, tubers, pulses and cooking oil in local markets across Kasulu as well as import and export trade patterns
Market integration	Establish how well source and supply markets are linked
Market patterns	Analyse volumes stored and traded, price levels and trends, price setting behaviour, competition and seasonality
Capacity to meet consumer demand	Analyse the market's potential to respond to current and transfer-induced increases in consumer demand, e.g. through storage facilities, stocking levels, stock replenishment lead-time, etc.
Use of markets	Analyse physical and economic access of food insecure populations in the country to local markets, how they (the markets) respond to price variations of food and non-food commodities, distance of vulnerable populations from markets and their road access to their key markets, etc. Analyse the market's potential or capacity to respond to current and transfer-induced increases in consumer demand, e.g. through assessing the number of traders by operational capacity, storage facilities, stocking levels, stock replenishment lead-time, seasonality
Overall market environment	Analyse the role and implication of government policies and regulations, road and transport infrastructure, the socio-political situation on trade patterns and volumes
Provide recommendations on:	▪ Feasibility of CBT intervention in the region/district/market ▪ What key bottlenecks / constraints are to be addressed for the CBT pilot to be implemented

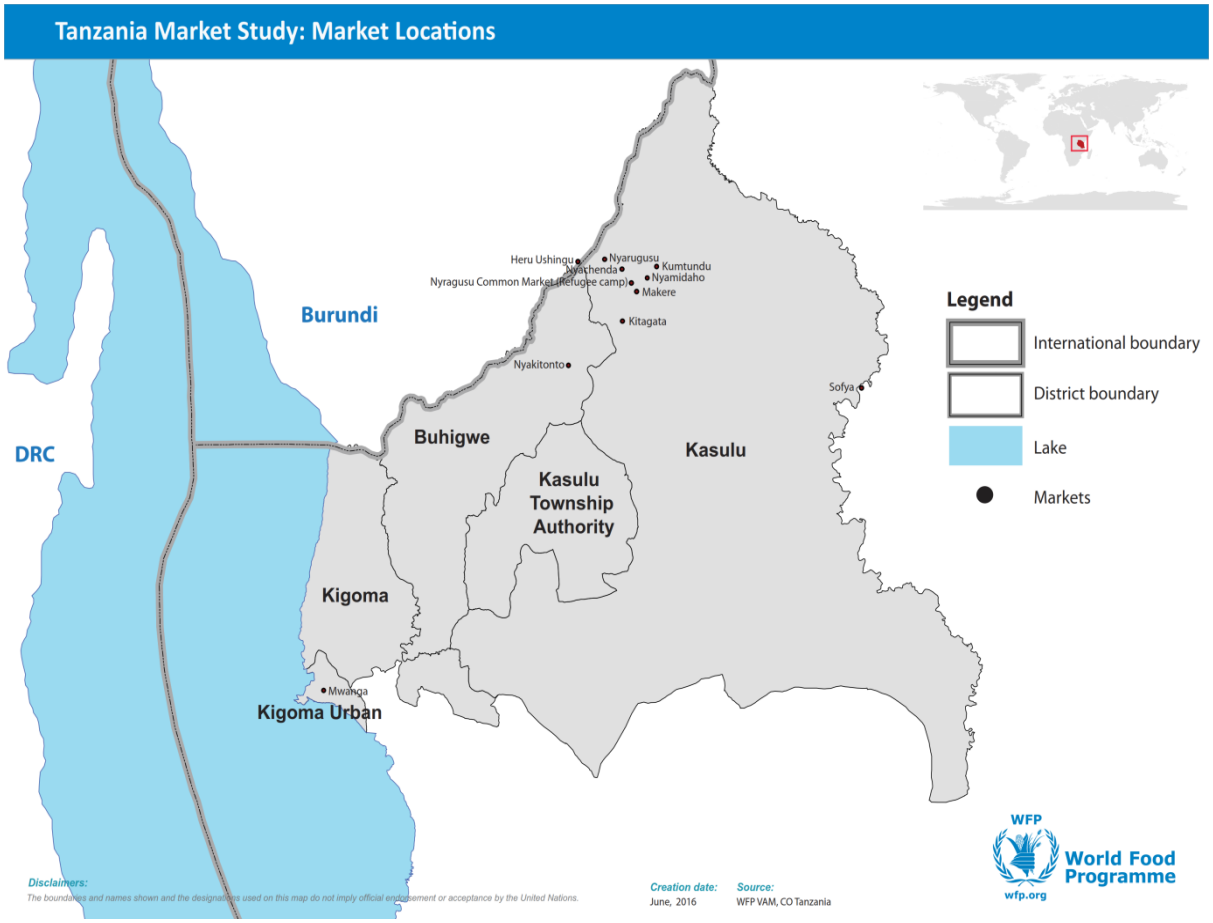
The market assessment employed both secondary and primary data sources to meet the above stated objectives. Primary data was collected using structured trader and key market informant questionnaires.

The key informant questionnaire was undertaken at market level with key market actors such as: the market chief and/or the market revenue collector. The key informant interviews were essential in identifying overall market trends and constraints. The key markets assessed were selected from discussions with Nyarugusu market traders on their main food sources throughout the year. While the trader questionnaire reviewed individual trader buying / selling trends.

From 23 to 28 April 2016 a team of 7 WFP Staff: 1 Regional Market Analyst from RBJ, 1 WFP Tanzania VAM (Vulnerability Analysis and Mapping Unit) Officer, 1 WFP Tanzania Logistics Officer, 1 WFP Tanzania Procurement Officer, 2 WFP Kigoma Sub-Office Officers and 2 WFP Kasulu Sub-Office Officers, undertook a market study in Kasulu.

The market assessment team visited 14 different markets assessing local capacity and trade routes to and from Kasulu. On average 2 questionnaires were collected by trader type (wholesaler, medium trader and retailer) across the different markets for a total of 83 questionnaires collected covering aspects of volumes of food traded, trader's storage capacity, food source, food prices, key trade constraints affecting traders, security and the repercussions of seasonality on trade. In every market key informant interviews were also held with the market chief and/or the market's revenue collector. The market assessment also built on secondary data from previous market and food security assessments in the region[7].

Map 1: Kasulu geo-locations of assessed markets



Source: Tanzania Market Assessment

[7] Nyarugusu nutrition survey 2012; Nyarugusu CHS Reports 2013 and 2014; Nyarugusu Sens Nutrition Survey Report 2014; UNHCR/WFP 2013 and 2015 JAM; and WFP market assessments (2013 and 2014)

1.3: Limitations of the Market Assessment

The assessment has the following limitations that readers should be aware of. The main ones being:

- The market assessment did not cover all of Nyarugusu's food sourcing markets due to lack of time. Distant source markets such as Kagerankanda (large agricultural production area), Mwali (one of the sources of cassava) and Mwanza and Bukoba (source of fish) were not covered by the assessment. This has meant that some important agriculture production data may not be captured in this report.
- Due to WFP's earlier presence in the region through a P4P (purchase for progress) project where WFP was buying food from locals, interviewed traders may have believed the assessment team were there to assess the levels of stocks for WFP food procurement. As a result, some trader volumes may have been exaggerated. Efforts were made to reduce the impact of possible exaggeration by probing through in-depth questions. In their introduction with traders enumerators clearly articulated the rationale of the assessment in more detail to ensure the purpose of the assessment was well understood by the respondent.
- Many traders were selling informally which meant cross-checking of responses was not easy (e.g. warehouses were often at the traders' homesteads, far from the market making it difficult for the assessment team to assess them). This can have led to inaccuracies in collected storage data.
- The market assessment could only manage to estimate warehouse sizes. If a CBT is to take place in Kasulu, an accurate measurement of markets' warehouses is required to accurately confirm the full available storage capacity in the region.
- The assessment and report writing took place ahead of the harvest; therefore, official production figures were not yet released forcing the report to use average production levels in previous years as guidance rather than official 2015-16 production figures.
- In general three main units of measure were being used across the district for grains, pulses and tubers (small, medium and large bowls). However, the units of sale did often differ by market and from one trader to the next, making it difficult to compare prices for the same product.
- There is lack of historical retail food price data for the district as a whole, and also for the individual markets. Therefore, food price integration analysis could only be completed at wholesale level, thus limiting the assessment's analysis on the extent that markets can effectively and timely absorb an increase in demand for specific food goods.
- Some traders owned different shops in the same town/village, possibly leading to duplication of some trade volume figures.

Section 2: Introduction and Macro-Economic Analysis of Tanzania

2.1: Introduction

Tanzania was formed in 1964 with the unification of Tanganyika and its neighbour island Zanzibar, to become the United Republic of Tanzania. Independence from Great Britain was gained in 1961 and 1964 respectively.

Tanzania is located in the Great Lakes Region of Africa, bordering Mozambique, Malawi and Zambia to the south, the Democratic Republic of Congo, Rwanda and Burundi to the west and Uganda and Kenya to the north. At 947,303km², Tanzania is the 13th largest country in Africa and the 31st largest in the world. Tanzania is highly diverse with mountainous and densely forested areas in the northeast, where the highest point in Africa, Mount Kilimanjaro, is found. To the north-west lie Lake Victoria and Lake Tanganyika, and to the southwest lies Lake Nyasa, these are three of Africa's largest and deepest lakes. Tanzania's central plateau is where the country's vast plains and arable land lie. Offshore, to the east of Tanzania lie the country's islands of Zanzibar, Pemba and Mafia.

Tanzania is the second largest economy in the East African Community (EAC) and the twelfth largest in Africa. The economy has been transitioning from a command to a market economy since 1985. Although total GDP has increased since these reforms began, GDP per capita dropped sharply at first, and only exceeded the pre-transition figure around 2007. The country is largely dependent on agriculture for employment, which accounts for about half of the employed workforce. An estimated 28.2 per cent of Tanzanians (approximately 12 million people) live in poverty, down from 34 per cent in 2007, and 90 per cent of whom live in rural areas of the country (WB 2016). Life expectancy at birth in 2014 was at 65 years, up from 50 years in 2000. Maternal mortality is still high at 398 per 100,000 live births but has steadily improved from 483 in 1996. The HIV/AIDS prevalence rate was at 5.1 per cent of adults (6.2 per cent for women and 3.8 per cent for men) aged 15 to 49 years (1.5 million people total) in 2015.

The 2015, and most recent, HDI Report mentioned the country to have an HDI value of 0.521, placing the country in the low human development category, precisely at 151 out of 188 countries and territories.

Tanzania Fact File

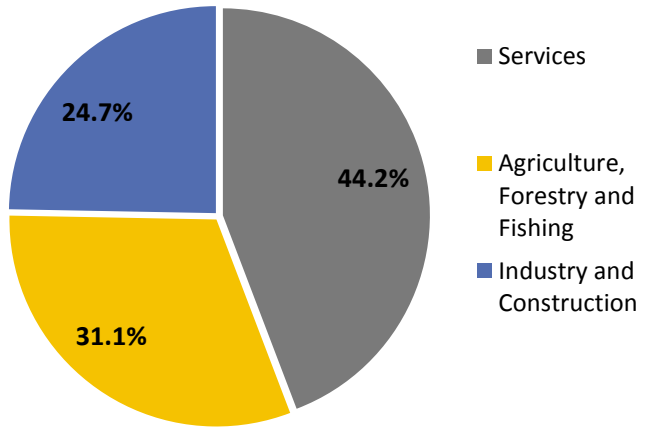
Population:	51.82 million, over 69% live in rural areas (WB, 2014). Annual growth rate 2.9%
Climate:	10˚C and 20˚C in the highlands (north-east of Tanzania) while the rest of the country temperatures rarely below 20˚C. Tanzania has two major rainfall patterns: uni-modal (southern, central and eastern area & bi-modal (northern part of Tanzania).
Political administration:	The country is divided into 30 regions: 25 on mainland & 5 in Zanzibar. Each region is divided into districts (local government authorities). Tanzania has 169 districts, 34 of which are urban units and 135 are rural.
Currency:	Tanzania's national currency is the Tanzanian Shilling exchanging at 2,190.50 to the US $ (7 June, 2016).
GDP Total:	US $48.06 billion (WB, 2014)
GDP Per Capita:	US $955.1 (WB, 2015) – Low Income economy
HDI:	0.521 – 151/188 (low, HDR 2015)
Gini Index:	37.8 (low – WB, 2011)

Between 1985 and 2014, Tanzania's HDI value increased from 0.371 to 0.521, an increase of 40.5 per cent or an average annual increase of about 1.18 percent. The unemployment rate in Tanzania was at an all-time low of 10.3 per cent in 2014 gradually falling from 12.9 per cent in 2001.

2.2: The Economy

Tanzania's overall macroeconomic performance remains strong with a high rate of economic growth and a low rate of inflation. GDP in Tanzania has increased from US $31.4 billion in 2010 to US $48.04 billion in 2014, making Tanzania East-Africa's fastest growing economy. The IMF predicts real GDP growth of above 7 per cent for 2016 and 2017.

Figure 1: Shares of 2014 GDP by economic activity at current prices; Tanzania Mainland



Source: National Bureau of Statistics (NBS) http://www.nbs.go.tz/

The country's main economic growth drivers have been the construction, transport, financial services, and tourism sectors. Tanzania's economy though still remains heavily based on agriculture, which accounts for around 25 per cent of total annual GDP (**Figure 1**) and contributes to 85 per cent of the country's exports. Agriculture also provides employment for around 75 per cent of the country's workforce. Nevertheless, the agricultural sector's growth has been slow, growing by only 4.3 per cent in 2012, much below the expected Millennium Development Goal target of 10.8 per cent. Tourism is the leading sector in terms of foreign exchange earnings while Tanzania's economic potential comes from the mining and energy sector which attracts considerable levels of investment through its gold mining and its recent discoveries of natural gas reserves.

The country's focus on large scale infrastructural projects, industrialization and especially on mining-led export growth has weakened the Tanzanian Shilling by more than 40% against the USD over the past five years, from an average annual exchange rate of 1,396 in 2010 to 1,985 in 2015. One example is the need to import machinery into the country for the country's big infrastructural projects resulting is high demand for foreign currency hereby pushing-up demand for the US Dollar vis-à-vis the Tanzanian Shilling.

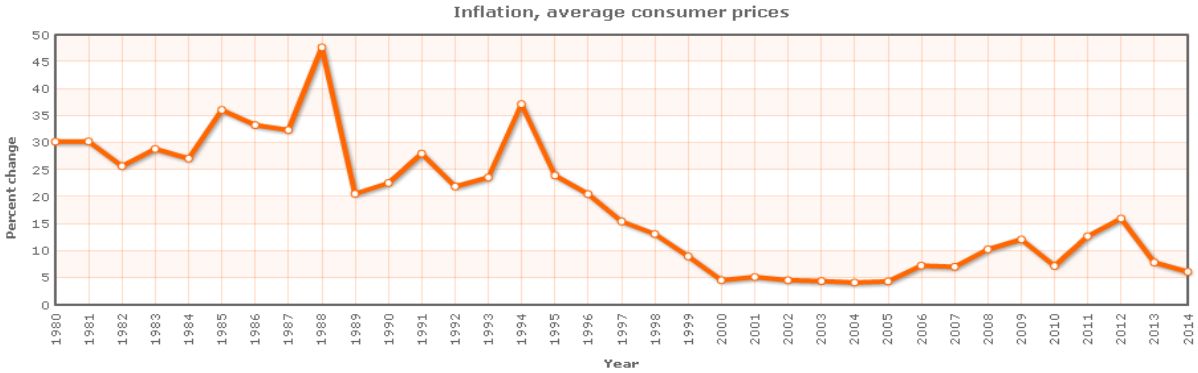
Nevertheless, Tanzania's negative trade gap shrank by 35 per cent over the past five years from US $5 billion in 2010 to US $ 3 billion in 2015. During the same period the export of goods increased by 85 per cent, from US $5 billion to US $ 9.5 billion. Imports also grew by 27 per cent, from US $ 9.8 billion to US $12.5 billion.

Future prospects are positive for Tanzania's economy as the government is focusing heavily on industrialization and infrastructure development. As a follow-up to the US $4 billion oil-export pipeline agreement with Uganda in mid-April 2015, Tanzania has signed a deal for a US $900 million railway project connecting Rwanda to Tanzania's main port (Dar es Salaam). Simultaneously, the Central Corridor railway project, one of Tanzania's major infrastructure projects, is expected to receive US $6.8 billion in foreign investment by Chinese authorities to implement the first phase of the project, which will establish a railway connection from Dar es Salaam to Mwanza, at the north-west border of the country.

Inflation and Consumer Price Index (CPI):

Inflation rates have generally been decreasing over the years. Especially after the mid-1990s the inflation rate in Tanzania has seen a continuous declining trend from 25 per cent down to below 10 per cent. While inflation did slightly increase between 2010 and 2012 due to increasing fuel prices and the price of food, it has nevertheless fallen again and lately stands at a relatively stable rate of 5.1 per cent in April 2016 (**Figure 2**). This is down to the country's tight monetary policy and falling international energy and food prices.

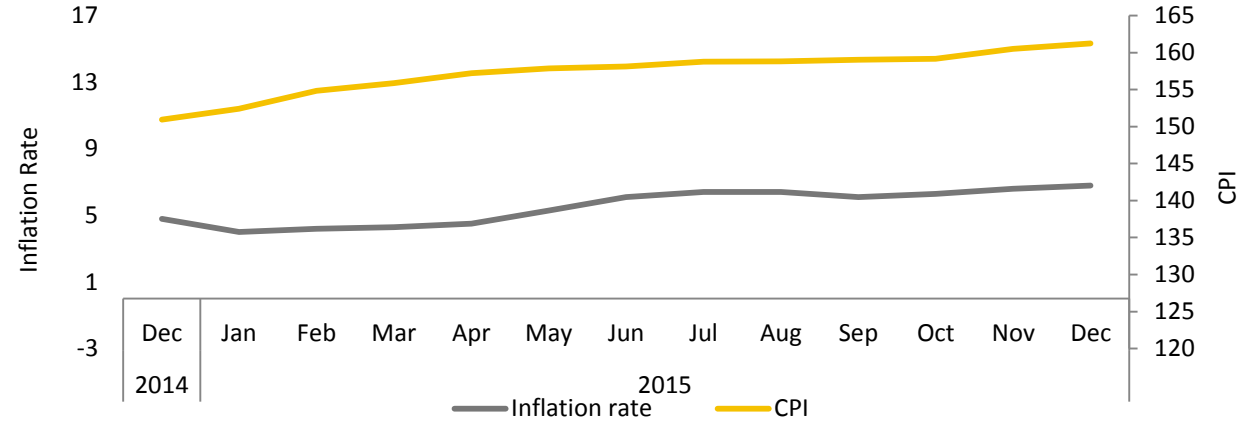
Figure 2: Tanzania's inflation rate



Source: IMF World Economic Outlook Database, April 2015

The National Consumer Price Index (NCPI) measures the change over time in the cost of a fixed basket of goods and services that are purchased by a representative sample of households. In Tanzania the index weights are based on expenditures of both urban and rural households in the country's 25 geographic regions. Taken from the National Bureau of Statistics website (NBS 2016) 'The most important categories in the NCPI are Food and Non Alcoholic Beverages (38.5 percent of total weight); Transport (12.5 percent); Housing, Water, Electricity, Gas and Other Fuel (11.6 percent); Clothing and Footwear (8.3 percent) and Furnishing, Housing Equipment and Routine Maintenance of the House (6.3 percent). The index also includes: Communication (5.6 percent of total weight), Restaurants and Hotels (4.2 percent of total weight), Alcoholic Beverages and Tobacco (3.7 percent), Miscellaneous Goods and Services (3.1 percent), Health (2.9 percent), Recreation and Culture (1.6 percent) and Education (1.5 percent)'. While in 2014 and 2015 the inflation rate has remained relatively stable the CPI has seen a slight increase.

Figure 3: Monthly CPI and Inflation rate in Tanzania

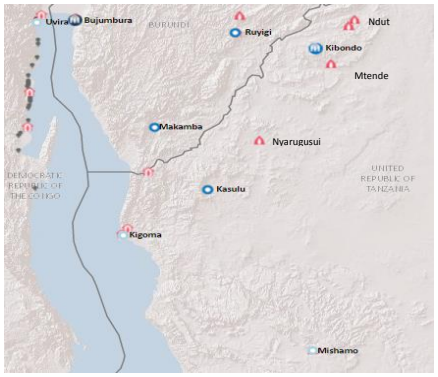


Source: National Bureau of Statistics (NBS, 2016)

2.3: Socio-Political context

The United Republic of Tanzania has remained stable since its independence in 1961, with only isolated and short lived incidents of unrest usually related to elections since multi-party democracy was re-introduced in 1992. On the other hand, Tanzania is surrounded by 8 countries, most of which are more politically unstable and prone to conflict. Civil strife and ethnic conflicts in Burundi, Rwanda, the Democratic Republic of the Congo (DRC) and even Kenya, have resulted in refugees seeking safety in Tanzania over several decades.

Map 2: Refugee camps in Tanzania



Source: UNHCR 2016[8]

Following the recent political unrest in Burundi, the number of refugees in the camp of Nyarugusu increased dramatically towards the end of 2015, as a result necessitating to re-open the camps of Nduta and Mtendeli which had been closed in 2009. Currently Tanzania hosts over 205,000 refugees from Burundi (140,000) and DRC (65,000) in three refugee camps Nyarugusu, Mtendeli and Nduta, located in the north-east of Tanzania on the border with Burundi and DRC (**Map 2**).

In addition to registering strong and sustained economic growth, Tanzania has also registered strong progress towards a number of social goals. These include: weight for age malnutrition, HIV/AIDS incidence and prevalence, malaria incidence, educational enrolment and gender parity in primary and secondary education. In addition, Tanzania has also maintained peace and stability in a conflict prone region, undertaken regular conduct of multi-party elections and made advances in women's leadership in the context of a relative press freedom. The country has also prepared and implemented a large number of legal, policy and planning reforms.

These economic, social and political transformation gains are however affecting people across the economic strata and parts of the country differently. Tanzania is experiencing major transformation in social attitudes as a process of modernization takes hold, particularly in urban areas, while deeply entrenched norms and standards still hold sway in more rural settings. The economy is growing fast but producing few well-paid formal sector jobs to absorb the mass of individuals graduating from the growing number of tertiary and vocational training institutions. The benefits of transformation are largely urban in nature though and based in a small number of capital-intensive fast growing sectors with limited linkages to the rest of the economy, while instead little change is experienced in rural areas where high levels of poverty are found.

The poorer regions in the country are predominantly rural and their local economies tend to be much less diversified. Agriculture is the main economic / livelihood sector in these areas, with low productivity and low-paying employment. Per capita incomes in these regions is less than half that found in the capital city, Dar-es-Salaam, the wealthiest area of the country. The poverty rate in the rural areas is eight times higher than in the capital.

[8] UNHCR, 2016 http://reporting.unhcr.org/node/2517#_ga=1.205944467.1638440697.1465644481

2.4: Agriculture and Food Security

2.4.1 Agriculture:

Tanzania has a total area of 95.5 million hectares (Mha) of land, of which 44 Mha (46 per cent) are classified as suitable for agriculture[9]. Out of the available arable land only 10.1 Mha or 23 percent of is currently under cultivation. Agriculture in Tanzania is mainly rain-fed and is dominated by smallholder farmers cultivating average farm sizes between 0.9 ha and 3.0 ha. About 70 percent of Tanzania's crop area is cultivated by hand hoe, 20 percent by ox-plough and 10 percent by tractor. Food crop production dominates the agriculture economy, with 85 percent of the annually cultivated land under food crops. Women represent the majority of the agricultural labour force. Major constraints for agriculture in Tanzania are the decreasing labour and land productivities due to application of poor production technology and dependence on unreliable and irregular weather patterns.

With numerous rivers, lakes and underground water resources, Tanzania has huge potential for irrigated agriculture. According to research done by Global Yield Gap Atlas[10], a University of Nebraska-Linoln and the University of Wageningen Research Centre, of the total arable land area, 29.4 Mha has varying degrees of development potential for irrigation (NIMP, 2002): It is estimated that there are 2.3 Mha of high potential, 4.8 Mha of medium potential, and 22.3 Mha of low potential land for irrigation. The total area currently under irrigation is less than 0.5 Mha, of which only 0.4 Mha (1.2% of the total irrigation potential area) has good irrigation infrastructure, while another 0.1 Mha is still under traditional irrigation practice. The main irrigated crops are tea, sugar cane, coffee, flowers, grapes, fruits, maize, paddy, onions, tomatoes, vegetables, spices and pastures.

Tanzania has a considerable variation in farming systems due to the large variation in climatic and agro-ecological conditions. There are ten major farming systems in Tanzania. Major staple and cash crops are listed in **Table 1**.

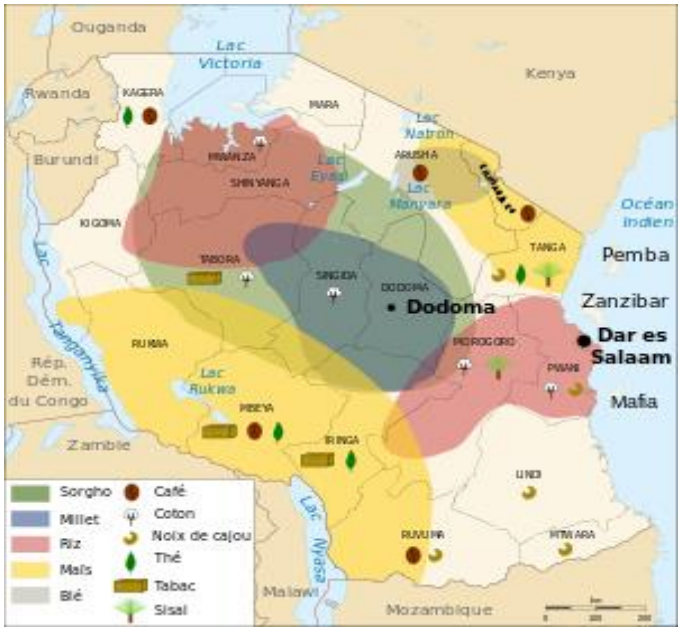
Table 1: Main Staple and Cash crops grown in Tanzania.

Type of Crops	Crops
Staple Crops	Maize, sorghum, millet, rice, wheat, beans, cassava, potatoes, bananas and plantains
Cash and Export Crops	Coffee, cotton, cashew nuts, tobacco, sisal and pyrethrum, tea, cloves, horticultural crops, oil seeds, spices and flowers

Source: Global Yield Gap Atlas http://www.yieldgap.org/tanzania

[9] Global Yield Gap Atlas http://www.yieldgap.org/tanzania
[10] Global Yield Gap Atlas http://www.yieldgap.org/tanzania

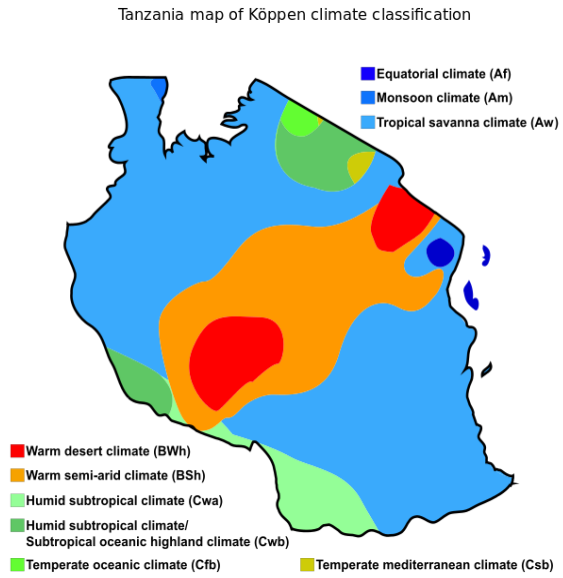
Map 3: Tanzania crop planting areas



The agricultural sector accounts for much of the economic activity in both Mainland Tanzania and Zanzibar, though the types of crops produced vary dramatically. In Mainland Tanzania, food and cash crop production (and particularly maize) remains the mainstay of the agricultural sector. In Zanzibar, by contrast, cash crop production (and particularly clove) comprises the bulk of agricultural activity. While slow but steady improvements have been seen in recent years, concerns remain that the agricultural sector in both areas has not reached its full potential (**Map 3** – in French, English version not found).

Source: http://www.yieldgap.org/tanzania

Map 4: Tanzania micro climates



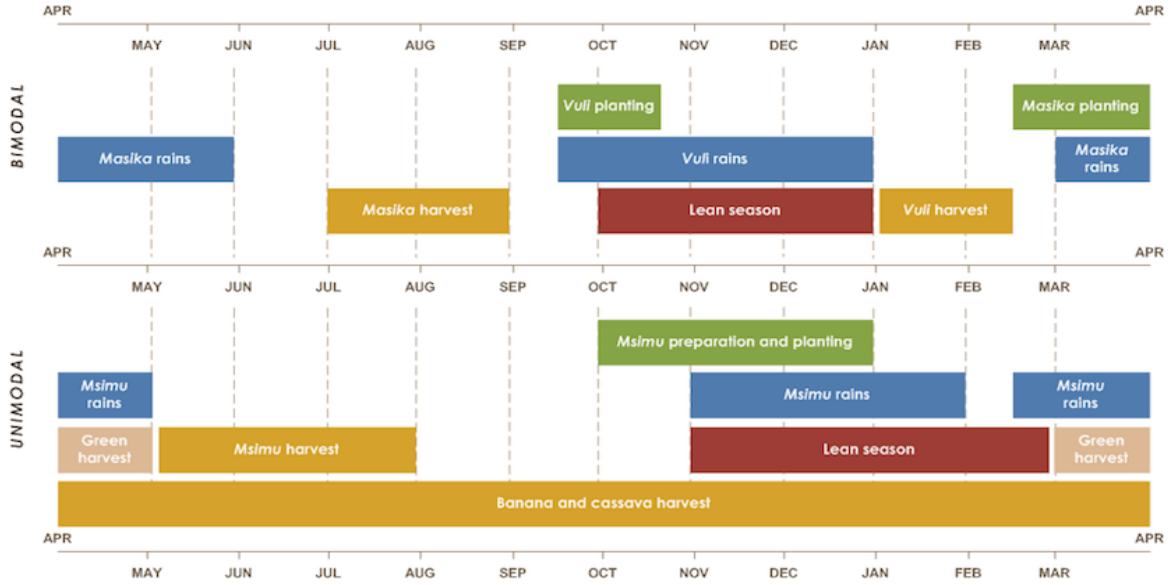
The strong dependence on agriculture makes Tanzania's economy highly vulnerable to weather shocks and fluctuating commodity prices. Approximately 76 per cent of Tanzania's population lives on subsistence farming and due to the lack of knowledge and infrastructure to develop and implement agricultural technology, any droughts, floods, or temperature shocks can severely damage people's livelihoods in the country. Tanzania has a number of micro-climates as shown in **Map 4**.

Source: World Köppen-Geiger Climate Classification[11]

The country experiences two major rainfall patterns: uni-modal in the southern, central and eastern area of the country where rains fall primarily between October and April; and a bi-modal rainfall pattern in the northern part of the country where it usually rains between October and December and between March and May (**Figure 4**).

[11] World Köppen-Geiger Climate Classification http://www.hydrol-earth-syst-sci.net/11/1633/2007/hess-11-1633-2007.html

Figure 4: Tanzania's national agriculture calendar



Source: FEWS NET http://www.fews.net/east-africa/tanzania

2.4.2 Food Security:

Food security remains a major challenge for the country. Poverty and malnutrition are features of Tanzania's human development picture. Tanzania's current food security situation is characterized by seasonal and regional food shortages. Despite significant economic and agricultural growth in Tanzania over the past decade, along with improvements in health, education and other infrastructure, the rates of household poverty, and food shortage have not substantially decreased. Physical access to food and the ability to acquire food is still a major challenge. Several councils in Tanzania have unacceptable malnutrition status of under-five years old (Tanzania, 2012[12]). The majority of poor and food insecure households live in rural areas. Agriculture is central in the battle against hunger.

Poverty incidence is also high. Both income (consumption) and development indicators clearly show that levels of poverty in Tanzania are at unacceptably high levels. Over the past two decades poverty rates have been declining so slowly that it was virtually impossible for the country to realize its poverty incidence level of 18 percent by 2015 as envisaged by Millennium Development Goals (MDGs). The results from the National Bureau of Statistics' Household Budget Surveys HBS 2007 and HBS 2012 show that 28.2 percent of Tanzanians are poor, 9.7 percent of them being extremely poor. Poverty is more prevalent in rural areas than in urban areas. It is therefore correct to argue that not all growth is equally effective in reducing poverty. Tanzania's experience shows that despite progress in tackling extreme poverty and good economic growth rates, persisting poverty remains a pressing issue and has a bearing on food and nutrition security.

Over the past few years Tanzania has been harvesting surplus amounts of cereals compared to its national requirement. For example for the 2014-15 harvest Tanzania produced a surplus of 928,000 tonnes of cereals. The only country in southern Africa apart from Zambia to record a surplus for that year. Tanzania's food balance sheet for the 2015-16 harvest is still to be finalized. However, from provisional figures released by the Government it looks like the country will likely meet its 2016 cereals requirements by 123% (food self-sufficiency ratio – SSR). The Tanzanian Government's summary mentioned that a total of 43 out of nearly 140 rural districts would likely have pockets of

[12] Chronic malnutrition levels are above 30% (high), RVAC Data.

food insecurity. The Government is therefore planning for a further assessment in September 2016 to assess the impact of food insecurity in these affected areas. In short the country will have marginal surplus mostly for non-cereal but also some key cereals such as maize and rice.

At the regional level the food security outlook looks very bleak. Nine out of 10 SADC countries who conducted assessments (Tanzania is yet to announce their official food balance sheet for 2015-16) have reported that they will be experiencing food shortfalls for the 2016-17 marketing season and that they will have to be importing food to meet their national requirements. This includes South Africa, the region's biggest maize producer (world's number 10 maize producer), which is experiencing a shortfall of 3.8 million tonnes (1.1 million white maize and 2.7 million yellow maize) of maize. The region as a whole is expected to have a deficit of 5.1 million tonnes of maize and 9.3 million tonnes[13] of cereals for the 2016-17 marketing season. **Tables 2** and **3** below, outline RVAC's 2016 maize and cereal production figures for southern Africa. **Table 4** puts the harvest deficit data in perspective of number of vulnerable (and food insecure) people in the region by country and overtime (since 2010/11 to 2016/17).

Table 2: RVAA Maize Production Figure Estimate for 2015-16 harvest

Preliminary Cereal Balance Sheet by Country ('000 MT)

Country	Ang	Bot	Les	Mal	Moz	Nam	RSA	Swa	Zam	Zim	SADC
A. Domestic Availability	2,282	5	47	2,133	1,988	55	10,060	42	3,397	725	20,734
A.1 Opening Stocks	44	1	22	15	194	17	2,332	9	668	213	3,514
Formal/SGR	44	1	16	15	97	17	2,332	4	361	163	3,356
On Farm	-	-	5	-	97		-	1	39	50	153
Other	-	-	-	-			-	4	268	-	4
A.2 Gross Harvest	2,238	4	25	2,118	1,794	38	7,728	33	2,729	512	17,221
B. Gross Domestic Requirements	3,129	308	253	3,205	2,102	173	11,673	157	2,562	2,274	25,837
C. Desired SGR Carryover Stocks	-	-	-	-	-		-	-	-	-	-
D. Domestic Shortfall/Surplus	-847	-303	-206	-1,072	-114	-118	-1,613	-114	835	-1,549	-5,102
E. Percent availability vs. requirement	73%	2%	19%	67%	95%	32%	86%	-27%	133%	32%	80%

Source: RVAC Dissemination meeting 9-10 June 2016
*Not including figures from DRC, Madagascar, Mauritius, Seychelles and Tanzania

Table 3: RVAA Cereal Production Figure Estimate for 2015-16 harvest

Preliminary Cereal Balance Sheet by Country ('000 MT)

Country	Ang	Bot	Les	Mal	Moz	Nam	RSA	Swa	Zam	Zim	SADC
F. Domestic Availability	2,532	19	65	2,265	2,675	92	12,311	49	3,607	854	24,470
A.1 Opening Stocks	158	13	34	15	379	25	3,012	15	811	216	4,678
Formal/SGR	158	13	28	15	248	25	3,012	9	811	163	4,483
On Farm	-	-	6	-	131	-	-	1	-	53	191
Other	-	-	-	-	-	-	-	4	-	-	4
A.2 Gross Harvest	2,374	6	31	2,250	2,296	68	9,299	34	2,886	638	19,791
G. Gross Domestic Requirements	4,380	647	358	3,369	3,587	327	14,895	205	3,051	2,969	33,789
H. Desired SGR Carryover Stocks	-	-	-	-	-	-	-	-	-	-	-
I. Domestic Shortfall/Surplus	-1,848	-631	-293	-1,104	-912	-234	-2,584	-157	556	-2,115	-9,319
J. Percent availability vs. requirement	58%	3%	18%	67%	75%	28%	83%	24%	118%	29%	72%

Source: RVAC Dissemination meeting 9-10 June 2016
*Not including figures from DRC, Madagascar, Mauritius, Seychelles and Tanzania

[13] Estimates do not include data from DRC, Madagascar, Mauritius, Seychelles and Tanzania.

Table 4: Changes in the Number of Vulnerable People 2010/11 to 2016/17

Country	Marketing Year							% change
	2010/11	2011/12	2012/13	2013/14	2014/15	2015/16	2016/17	
Angola			367 190	665 000	755 678	1 253 048	1 253 048	0%
Botswana				28 936	29 306	30 318	57 411	89%
DRC	5 860 872	5 445 000	6 395 448	7 318 639	6 591 535	4 456 106	7 500 000	68%
Lesotho	200 000	514 000	725 519	223 055	447 760	463 936	709 394	53%
Madagascar						1 800 000	1 140 000	
Malawi	508 089	272 502	1 972 993	1 855 163	1 312 376	2 833 212	7 609 040	169%
Mozambique	350 000	245 000	270 000	212 000	150 000	375 905	1 980 000	427%
Namibia	42 100	243 474	74 711	778 504	117 662	578 480	729 134	26%
South Africa	14 547 022	12 871 320	13 625 930	13 798 024	14 060 928	14 349 445	14 349 445	0%
Swaziland	160 989	88 511	115 713	289 920	223 249	320 973	638 251	99%
Tanzania	1 141 214	1 618 795	1 472 127	828 063	424 136	358 505	358 505	0%
Zambia	53 629	74 804	62 842	209 498	351 267	798 948	975 738	22%
Zimbabwe	1 287 937	1 390 000	1 668 000	2 206 924	564 599	2 829 159	4 071 233	44%
SADC	**24 151 852**	**22 763 406**	**26 750 473**	**28 413 726**	**25 028 496**	**30 448 035**	**41 371 199**	**36%**

Source: RVAC Dissemination meeting 9-10 June 2016
*Not including figures from DRC, Madagascar, Mauritius, Seychelles and Tanzania

Section 3: Market Assessment Findings

3.1a: Kasulu

Kasulu District is one of six districts in the Kigoma Region of Tanzania. The district is located in the north-eastern part of Tanzania bordering Burundi to the north and is found some 78kms south-west from the shores of Lake Tangynika by Kigoma Town. Kasulu has a total population of 634,038 people. The main town in the district is called Kasulu Town and the district is also home to 137,843 refugees, all accommodated in the Nyarugusu Refugee Camp. Two other refugee camps exist in Tanzania's Kibondo district: Mtendeli and Nduta. Combined these latter two refugee camps are home to approximately 30,000 refugees. This report will focus entirely on Nyarugusu Refugee Camp.

A large majority of Kasulu's population fall in the poor and very poor income bracket with 80 per cent of the population living below the poverty line (154,549 TZS)[14]. Many are unemployed and most households try to be self-sufficient by farming small plots of land. Those few, who do undertake salaried work, tend to be employed by local services such as by the telephone companies, the government and NGOs/UN, while others are medium and retail traders.

Farming is the main livelihood activity in the district enabling the district to produce in excess of its direct food requirement. Due to its ample excess food production, Kasulu is a major food trading district. Of the excess food grown 81.7 per cent or around 938,000 tonnes is traded annually to other districts in Tanzania as well as across borders to Burundi, DRC, Rwanda, Uganda, and South Sudan. The district is a big producer of maize, cassava, rice, beans, banana plantain, tomatoes and onions. The district also produces palm oil, although not in sufficient quantities (and also of sub-standard quality) to meet the district's requirement. Kasulu district therefore imports palm oil directly from Kigoma and Dar es Salam. Lack of appropriate food farming knowhow, limited road

[14] 2008 Kasulu District Council

infrastructure and a restrictive national government directive impeding refugees from farming fallow land are limiting food productivity in Kasulu. The 2013-14[15] harvest in Kasulu district was of 405,968 tonnes for white maize, 326,083 tonnes for cassava, 14,373 tonnes for rice, 147,437 tonnes for beans 154,177 tonnes for banana plantain and 2,810 tonnes[16] for palm oil.

Six types of traders tend to operate in the Kasulu food market: farmers, retailers, medium vendors, wholesalers, collectors and transporters traders (see **Table 7**, page 26 for more information). Of the 80 traders interviewed by the market assessment in Kasulu, 49 per cent mentioned their business ownership to be male, 37 per cent mentioned ownership was female and 13 per cent was combined ownership (**Table 5**).

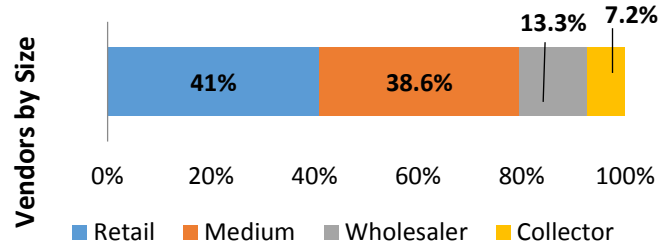
Table 5: Food trade business ownership by gender in Kasulu

Total markets	Retailers	Medium Vendors	Big Vendors	Collectors	Total
Male	30.3%	65.6%	30%	87.5%	49.4%
Female	63.6%	15.6%	50%	0%	37.3%
Both	6.1%	18.8%	20%	12.5%	13.3%

Source: Tanzania Market Assessment

Female traders largely engage in retail food sales and wholesale. Instead male traders engage in all trade activities however, tend to dominate sales in the medium vendor and trade collector categories (**Table 5**).

Figure 5: Per cent of trader typology assessed in Kasulu

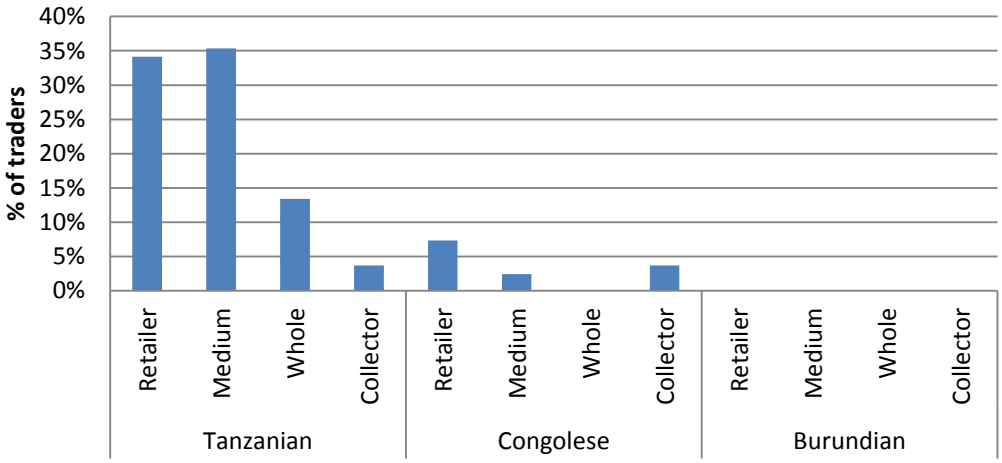


Of the 80 traders surveyed in Kasulu, 41 per cent were retailers, 38.6 per cent were medium vendors, 13.3 per cent were wholesalers and 7.2 per cent were collectors (**Figure 5**).

Source: Tanzania Market Assessment

In terms of nationality, the majority (87 per cent) of food traders interviewed in markets across Kasulu were Tanzanian nationals. Only 13 per cent were foreign nationals, all of whom were DRC nationals (**Figure 6**).

Figure 6: Per cent of trader nationality by type of trader assessed in Kasulu



Source: Tanzania Market Assessment

[15] 2014-2015 and 2015-2016 production figures are not available.
[16] 2013-14 agriculture production figures

Trade is largely informal with traders not owning a trading license, but instead paying local market taxes. These taxes refer to the market fee/tax for retailers at 200 TZS per day and a crop levy of 1,000 TZS per bag of maize or cassava and 1,500 TZS for a bag of beans.

Monetization of WFP distributed food occurs regardless of WFP product. Both refugee groups are known to frequently sell WFP maize meal, split peas/beans, fortified cooking oil and super cereal and WFP commodities as well as non-food-items (NFIs) provided by other agencies find their way to the markets surrounding Nyarugusu Refugee Camp.

3.1b: Nyarugusu Refugee Camp Common Market

Within Kasulu district and found at around 66km inland from Kasulu Town and 150km from the Tanganyika Lake, lies the Nyarugusu Refugee Camp. The camp is one of the largest refugee camps in the world. Nyarugusu Refugee Camp is approximately 28,196km² and was established in 1996 by UNHCR and the Tanzanian Government to accommodate some of the 150,000 DRC refugees who fled political and ethnic violence in Eastern DRC in the mid-1990s. Currently the camp is hosting 137,843 refugees, of which 68,843 are DRC nationals and 69,000 are Burundians.

According to Tanzanian official legislature, refugees in Tanzania are kept to their camps and movement outside the camp is restricted and only granted on presentation of an official exit permit. Refugees in Tanzania therefore depend entirely on humanitarian assistance to meet their livelihood requirements. In the Nyarugusu Refugee Camp, this translates to WFP food distributions and UNHCR non-food item distributions. Some refugees, albeit not many, are growing some vegetables in plots of land inside the camp; however, the food grown is not enough to meet household's food and diet diversity requirements. The Tanzanian government has recently allowed the sale of food to refugees through a formal market structure found inside the camp.

Figure7: Food Market Structure in NCM

Source: Jan Michiels

The Nyarugusu Common Market (NCM) was set up in December 2015 to accommodate for refugees extra food and non-food item needs. NCM is located on the southern edge of the refugee camp and can be an important source of local commodities for the refugees. The large market can accommodate 619 traders, 333 of whom are food retailers. The market is dominated by a large market structure (**Figure 7**) which has room for 99 of the 333 food traders. A second market ('Soko') also exists within the refugee camp, located more centrally in the refugee camp (Zone 3). It is however, a much smaller market and is not recognized by the authorities. Traders are officially only permitted to sell in NCM.

Of the 11 traders interviewed in NCM, 64 per cent mentioned their business ownership to be male, 27 per cent mentioned ownership was female and 9 per cent had combined ownership (**Table 6**).

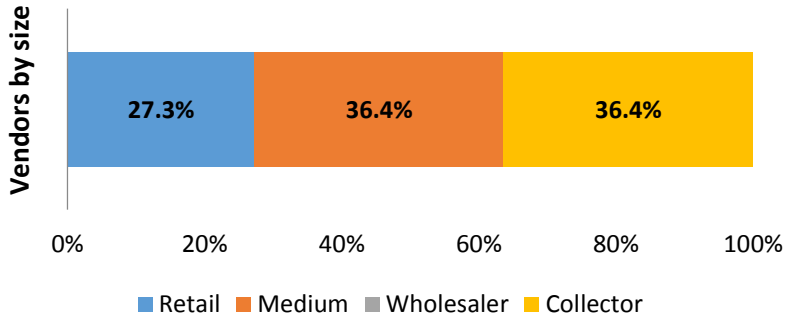
Table 6: Food trade business ownership by gender in NCM

Nyarugusu Camp	Retailers	Medium Vendors	Big Vendors	Collectors	Total
Male	0%	75%	0%	100%	63.6%
Female	66.6%	25%	0%	0%	27.3%
Both	33.3%	0%	0%	0%	9.1%

Females dominate the food retail sector while they also engage in medium volume trade. Males on the other hand tend to be focused on medium vendor volume of sales as well as outright dominating the collector trade sector (**Table 6**).

Source: Tanzania Market Assessment

Figure 8: Per cent of trader typology assessed in NCM

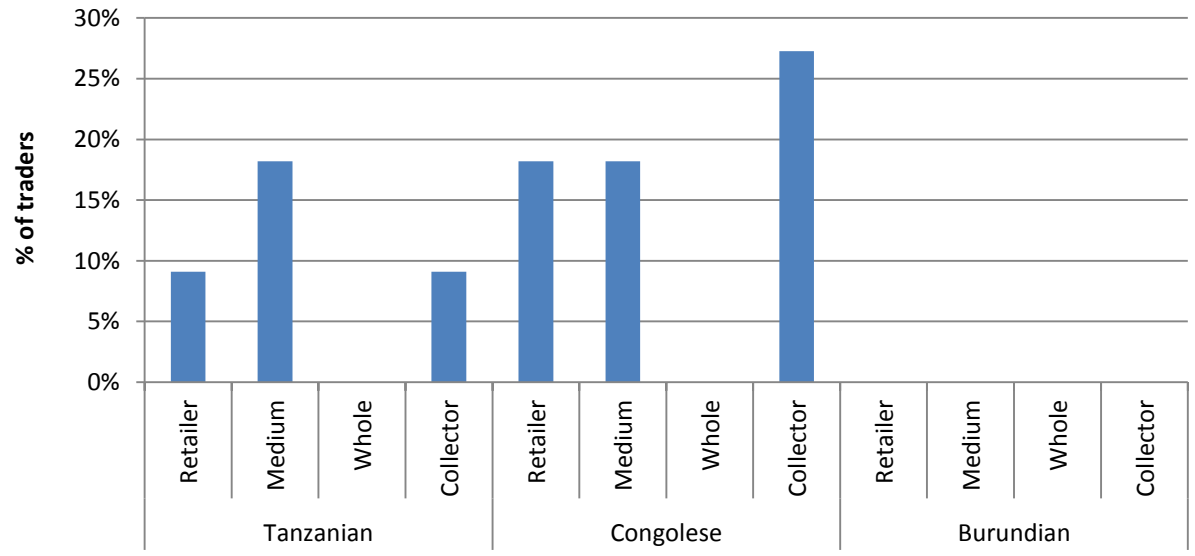


Of the 11 traders surveyed in NCM, 27 per cent were retailers, 36 per cent were medium vendors and 36 per cent were collectors (**Figure 8**). Due to the limited structure of the market, and possibly also since it had only recently officially opened, NCM did not have any wholesalers.

Source: Tanzania Market Assessment

In terms of nationality, the majority (63.5 per cent) of food traders the assessment team interviewed in NCM were DRC nationals (**Figure 9**). Traders of Tanzanian nationality completed the remaining 36.5 per cent. Even though the survey was targeting traders randomly and not by nationality, Burundian traders were not surveyed. Hereby possibly insinuating that Burundian nationals do not trade in food at NCM or that if they do, they represent only a small number of overall traders. It is also possible that since Burundian refugees have only recently arrived in Nyarugusu, that they are still settling-in.

Figure 9: Per cent of trader nationality by type of trader assessed in NCM



Source: Tanzania Market Assessment

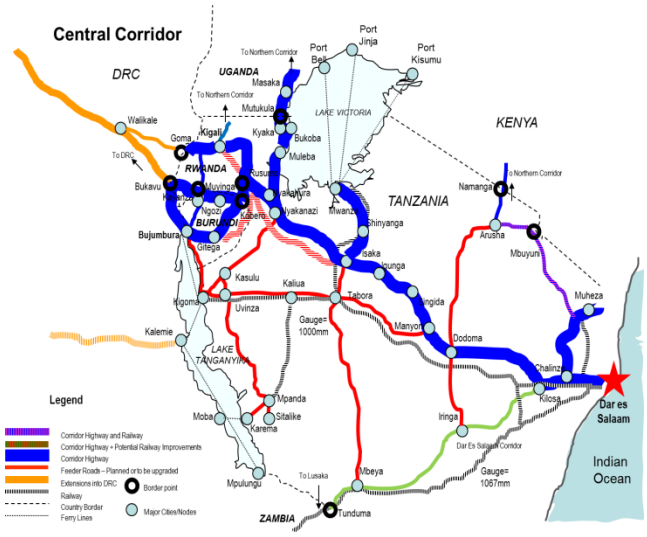
Similar to other traders in Kasulu, NCM traders did not own a license to sell in NCM. They were also required to pay a market fee of 200 TZS per day and a crop levy of 1,000 TZS per bag of maize or cassava and 1,500 TZS for a bag of beans.

Also similar to traders in Kasulu, monetization of WFP distributed food occurred regardless of the WFP commodity. Both refugee groups were known to frequently sell WFP maize meal, split peas/beans, fortified cooking oil and super cereal.

3.2: Kasulu Market Structure

Tanzania is strategically located on the eastern coast of Africa straddling east and southern Africa. It is part of the East African Community (EAC) as well as being part of the Southern African Development Community (SADC), hereby also making it part of the African Free Trade Zone (AFTZ). All these agreements facilitate trade and the movement of goods and services which enter and cross Tanzania through its main trade routes: Dar es Salaam port (one of the busiest ports in Africa); The Northern Corridor to Kenya; The Corridor Highway to Uganda, Rwanda, DRC and Burundi; and the Dar es Salaam Corridor to Zambia. Thanks to its active trade with neighbouring countries, Tanzania is known as the Central Corridor of Africa acting as the regional backbone of the transportation system in East and Eastern Central Africa and supplying imports to five countries with a combined population of 120 million (**Map 5**).

Map 5: Central Corridor Trade Route



Kasulu is found on the border with Burundi and DRC along the country's Corridor Highway. Tanzania's open economic policy during times of food surplus allows for unrestricted movement of goods and provision of services. This is also the case for traders and farmers in Kasulu who see their excess supply of food sold to neighbouring districts in Tanzania as well as across the border to Burundi, Rwanda, Uganda, South Sudan and DRC. Tanzania employs a Value Added Tax (VAT) of 18 per cent for all goods imported into Tanzania; it currently does not impose VAT on the export of goods.

Source: Central Corridor Transit Transport Facilitation Agency (CCTTFA)[17]

Kasulu falls in the uni-modal climate system. Producers in the region are largely informal small-scale farmers growing a varied food basket according to the season. The main crops grown in the district are cassava, white maize grain, rice, wheat, palm oil, beans, and an assorted set of vegetables (tomatoes, onions, potatoes, cassava leaves, etc.). Even though a set of key markets do exists, food markets in Kasulu are largely small in scale and operate at full capacity only once a week, during their market day. Storage capacity tends to be at the farmer or trader's homestead with only limited storage space at markets. Road networks in Kasulu are of poor quality and number, limiting movement of goods and services. Food production in the region is not intensive, limiting yields. Nevertheless, Kasulu remains by-and-large a net-food exporting district for a number of commodities, supplying both surrounding districts in Tanzania as well as neighbouring countries.

Kasulu's top traded commodities are white maize grain, rice, cassava, beans tomatoes and onions. **Table 7** outlines the different type of traders involved in food trade in Kasulu. This report focuses on the following commodities: maize grain, cassava, beans and cooking oil, and the following traders in more detail: large scale traders (wholesalers), medium sized traders/ (medium vendors) and small scale traders (retailers).

[17] CCTTFA http://centralcorridor-ttfa.org/about-us/central-corridor-trade-route/

Table 7: Detailed description of Cereal and Tuber trade in Kasulu

Local producers / farmers, local assemblers (collectors)	Produce, purchase, stock and trade maize grain, cassava flour, beans locally (within the district). Smallholder farmers tend to harvest maize grain and beans by end May and will trade it from June – September. Cassava is planted during the rainy period (October – April) and harvested at least 1.5 years later between June and September. Excess cassava is traded between September – December. Generally local producers produce enough to be self-sufficient throughout the year and what surplus they have they sell informally to neighbouring households or to local small-scale traders in local markets. They sell any surplus to the market and use markets to buy any commodities they have in short supply.
Small scale traders (retailers)	Purchase from producers and other traders in the same district or from nearby districts. They are known to dry and mill the cassava into cassava flour for sale. These actors sell directly to the final consumers selling primarily loose grain, cassava, beans. This group never sells to processors or institutions. Their capital and trade capacity is low; they merely meet their minimum requirements to satisfy their short-term livelihood needs. These traders tend to be Tanzanian and DRC refugee nationals. Traders from NCM fall into this category.
Cross-border traders (transporters)	An important actor for trade in maize grain, cassava, rice, beans, onions and tomatoes are foreign traders. Burundian traders will come from across the border in Burundi to purchase large quantities, up to 90 per cent annually, of available maize, cassava, rice and beans on local markets. Often out-buying local competition by paying higher prices. Traders in Kigoma will also buy considerable amounts of beans, maize grain, tomatoes and onions from Kasulu.
Medium sized traders (medium vendors)	Purchase maize grain, beans, and cassava from collectors, small-holder farmers and traders (wholesalers or other medium sized traders) and in most cases sell to small scale traders (retailers) and/or consumers, using both retail and wholesale units. They don't specialize and can sell a multitude of food commodities. They are known to dry and mill the cassava into cassava flour for sale. Due to greater liquidity capacity than small scale traders, medium sized traders are known to travel long distances to buy their food commodity/ies at the cheapest price and in bulk volumes. These traders tend to sell food commodities in 100kg+ sized bags. They are different to big vendors in that they also sell in retail units directly to consumers and that they have smaller storage capacity. They are known to collude with other medium-sized traders to buy in bulk reducing purchasing costs. It is not uncommon to find these traders owning multiple shops in the same town or across the same district. The number of medium vendors is slightly higher than big vendors in a given market location, but lower than small scale/ retail traders. These traders tend to be Tanzanian.
Large traders (wholesalers) and assemblers	They purchase stock just after the harvest (June-September) from transporters and local producers and store the food commodity at their warehouses in Kasulu Town where they treat (fumigate) the commodities and store them ahead of selling it to traders in the lean season at higher prices. They don't specialize and can sell a multitude of food commodities. They rarely sell to consumers and if they do, it is in 100kg+ bags. The financial capacity of this group of traders is strong compared with medium traders and retailers. The number of large vendors at district level markets is low, usually no higher than two.
Humanitarian Organisations	In the past, WFP bought considerable supply of food from farmers in Kasulu as part of its Purchase for Progress (P4P) Programme in an attempt to boost local production through producer re-investment. WFP is no longer buying from Kasulu since January 2012 as prices quoted by the Savings and Credit Cooperative Society (SACCOS) in Kasulu were higher than those in Dodoma and Kagerankanda

Source: Tanzania Market Assessment

Kasulu follows a three-level market network system: where primary, secondary and tertiary markets exist. This system ensures that food such as maize grain, cassava, and beans is transported / traded from food surplus to food deficit areas or where demand for the commodity is greatest. This system is further explained in **Table 8** below:

Table 8: Cereal and Tuber Supply Chain in Kasulu

Primary (household) markets	Smallholder farmers tend to harvest maize grain and beans by the end of May and will trade it from June – September. Cassava is grown in June – September and the excess is traded between September – November. Generally local producers produce enough to be self-sufficient throughout the year and what surplus they have they sell informally to neighbouring households or to local small scale traders in local markets. They will sell directly from their homestead or sell to traders in secondary markets.
Secondary (local) markets	A local food market where rural communities buy their food from. These markets tend to be located in a main village used by the locals up to 10kms away from the village. These markets are generally composed of defined selling locations and can be anything from a series of blankets on the ground, to more defined selling structures such as also including a set of stalls and small shops built of brick/stone/mud-bricks. Traders tend to focus on one or two varieties of commodities; such as maize and beans, or just cassava and just cooking oil. Examples of secondary markets are Kitagata, Makere, Mvugwe and Nyachenda. Road infrastructure to these markets tends to be poor (not well maintained gravel roads) and financial infrastructure is non-existent. Traders depend entirely on local production for their food supplies. Food prices in these markets tend to fluctuate extensively between seasons. Secondary markets supply tertiary markets with food commodities. They tend to be located along key trade routes in Kasulu. Traders in secondary markets have greater access to finances and infrastructure such as good mobile coverage and supply routes. These markets have a wider sphere of influence than primary markets and their traders' trade in greater volumes than those in primary markets. NCM falls in this category.
Tertiary (district/ province) markets	A market that is supplied from secondary markets. These are key hub markets dealing with large volumes of trade at one time and have regional and inter-national reach. These markets source their food supplies from key maize grain, beans, cassava traders locally, store and process the food locally in warehouses and supply food to food deficit markets where demand outstrips supply. These markets tend to have medium-sized traders / assemblers and wholesalers / large assemblers. Examples of tertiary markets are Mwanga in Kigoma and Sofya in Kasulu. The strong financial capital of traders in these markets means that actors can trade in wholesale quantities, reducing costs through economies of scale.

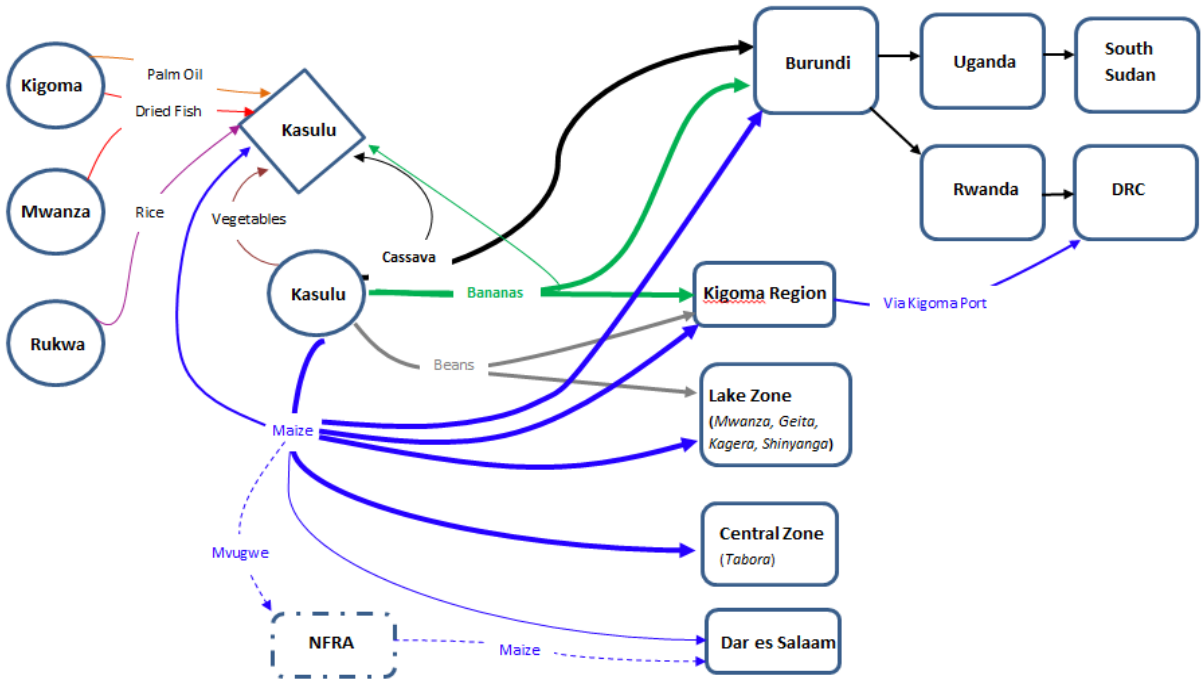
Source: Tanzania Market Assessment

In Kasulu goods steadily flow from primary to secondary to tertiary markets through-out the year with a few key bottlenecks/constraints, such as poor road quality which becomes a particular problem in the rainy season, lack of financial services and investment as well as under-developed food cultivation and storage techniques.

However, a well-constructed network of traders exists at each trade level enabling food to be traded and delivered in a matter of days. Kasulu has an important influence from Burundi traders who buy considerable amounts of food on an annual basis to feed the demand for food in Burundi.

Cooking oil (palm oil and vegetable oil) is largely imported into Kasulu from Kigoma and Dar es Salaam by wholesalers. **Map 6** illustrates the diversified commodity trade in Kasulu. Thicker / wider arrows indicates higher volumes of trade compared to thinner / narrower arrows.

Map 6: Overview of commodities market in Kasulu



Source: Updated WFP 2013 Kasulu Market Assessment diagram with Kasulu 2016 Market Assessment trade flows

Section 4: Food Availability in Kasulu

Kasulu is a food surplus district. Farmers produce enough to meet their food requirements and have excess supply for trade. Due to favourable rains, production in 2015-16 is anticipated to be very good for a multitude of commodities (notably maize, and rice) however, beans, which require drier climate conditions suffered compared to normal rainfall years. Farmers in Kasulu were also able to farm more hectares as they got access to Kagerankanda (a nature reserve with highly fertile soil known to provide up to three harvests per year) due to the 2015 Tanzanian Presidential election and government officials relaxed farming restrictions in the nature reserve.

As mentioned earlier in the report, refugees' movement in Tanzania is largely limited to their refugee camp. Movement outside the camp is restricted to only those refugees with an approved exit pass which tends to only be valid for a single day. Such restrictions limit refugees' access to food which prior to the establishment of NCM was solely provided through WFP's food distributions.

NCM is a functional market where refugees now have access to fresh and varied seasonal foods, hereby improving their diets. Nevertheless, due to their movement restrictions, refugees' access to non-WFP food remains constrained to the available food found in NCM at the price the market dictates. As this section will explore further, food availability in NCM is limited due to the poor storage facilities, high influence of WFP food and the increased risk of NCM selling fewer varieties of food commodities of poorer quality and at a higher prices.

4.1: Source of Food

Most food consumed in Kasulu is produced locally within the district. Only fish and palm oil is imported into the district. Food sources for NCM followed similar trends. **Table 9** outlines the commodities consumed at NCM by source. As is clear from the table, most of the food is procured locally. The table also shows those markets visited by the market assessment (noted with a tick) and their relevance to the NCM's food availability. The markets noted with an X were not visited due to

their excessive distance which made it difficult for the market assessment team to reach them within the limited market assessment timeframe.

Table 9: NCM food source market by commodity

Markets	District	Commodities Supplied	Was the market visited?
Nyachenda	Kasulu	Cassava	✓
Kitagata	Kasulu	Cassava	✓
Mwali	Kasulu	Cassava	X
Makere	Kasulu	Cassava	✓
Kagerankanda	Kasulu	Beans	X
Mvugwe	Kasulu	Maize and rice	✓
Sofya	Kasulu	Rice, wheat sugar, maize meal, palm oil	✓
Kigoma	Kigoma	Fish and palm oil	✓
Mwanza	Msanza (Region)	Fish	X

Source: Tanzania Market Assessment

4.2: Food Production in Kasulu

Kasulu has been producing greater volumes over the years. **Table 10** illustrates that depending on the commodity, average annual production increased by between 9 and 67 per cent. To note preliminary figures for 2014-15 reported an abnormal fall in production. These figures are not corroborated by other official sources. Figures for 2015-16 are yet to be released by the District Agricultural Irrigation and Cooperatives Officer DAICO.

Table 10: Food production in Kasulu District (MT)

MT	2009/10	2010/11	2011/12	2012/13	2013/14	2014/15*	2015/16**	Annual Average Increase
Maize	128,240	208,397	368,126	386,636	405,968	161,474*	-	37%
Cassava	129,000	167,626	287,771	310,555	326,083	110,505*	-	29%
Rice	10,214	13,038	13,038	13,689	14,373	14,504*	-	9%
Beans	85,700	86,681	115,900	140,416	147,437	66,262*	-	15%
Bananas	93,330	103,800	139,900	146,835	154,177	NA*	-	14%
Palm Oil	840	960	2,720	2,810	NA	NA*	-	67%

Source: Tanzania Market Assessment

* Accuracy of figures provided by DAICO and Regional RAA for 2014-15 are questionable as they reflect large district shortfalls which were not reported in Kasulu and neither by the traders interviewed. In fact traders and producers the market assessment interviewed reported the opposite, good harvests, even better than the previous bumper harvest.

** 2015-16 production figures not yet released from DAICO

4.3: Burundi Food Security

Fifteen years of civil war since 1993, combined with extreme poverty, a fragile political process and recurrent climatic shocks, have had a strongly negative impact on Burundi's economic and nutrition indicators.

Only 28 per cent of the population is food-secure and as many as 60 per cent are chronically malnourished. Food security for the majority of Burundians has not improved in recent years, despite a gradual return to peace. Average annual food deficits in Burundi range from 350,000 to over 450,000 metric tonnes (in cereal equivalent and after commercial imports and food assistance) against an annual average requirement of 1,718,000 tonnes, while food production has stagnated at pre-1993 levels. With a population growth rate of nearly three percent per year, per capita agricultural production has declined by 24 per cent since 1993.

As a result, the average per capita production now stands at 1,400 kilocalories per day (the recommended minimum requirement is 2,100 kilocalories per day). Even during harvest season, households spend up to 60 per cent of their income on food. Burundi is one of the 'red zone' countries identified by both FAO and WFP as being most affected by soaring food prices. After many years of conflict, the capacity of the government to respond to this new challenge is limited.

Burundi's worsening food security situation has greatly influenced food trade from Kasulu with which the country shares its southern border.

4.4: Importance of Food Trade in Kasulu

On average 81.7% (938,000 tonnes) of total food production in Kasulu is traded. Of this, around 82 per cent is traded externally (outside Tanzania, mainly to: Burundi, DRC, Rwanda, Uganda and South Sudan) while around 18 per cent is traded internally (within Tanzania, mainly to: Kigoma, Kibondo, Geita, Shinyanga, Mwanza, Tabora and as far as Dar es Salaam). The food which tends to be traded the most is cassava and maize followed by beans. Interestingly, palm oil (which is not a local commodity) is also traded hereby highlighting that Kasulu markets act as intermediary markets for other markets too (**Table 11**).

Table 11: Kasulu trade in main food commodities

Commodity	Internal Trade per week (MT)		External Trade per week (MT)		External Trade as % of Total Trade	
	May-Aug	Oct -Mar	May-Aug	Oct-Mar	May-Aug	Oct-Mar
Maize Grain	425.8	900.5	1,508	6,067	78.3%	87.1%
Rice	119.6	101.2	58.2	48.1	39.6%	41.0%
Cassava	409.5	124.1	1,178.8	1,121.2	78.3%	90.1%
Beans	69.8	102.9	229	376.9	77.2%	78.7%
Split Peas	64.3	64.1	64	64	49.9%	49.9%
Palm Oil	2.8	2.8	8	33.4	73.9%	74.2%
WFP Oil	3.74	3.75	0	0	78.9%	78.7%
Total	**1,102.7**	**1,306.5**	**3,404.9**	**7,744.7**	**75.5%**	**85.6%**

Source: Tanzania Market Assessment

4.5: Food availability compared to Nyarugusu Crequirement

The latest figures we have are for the 2013-14 harvest which is above the average harvest. As shown by **Table 10,** agriculture production figures in Kasulu have been steadily growing. Due to favourable rains in Kasulu, the 2015-16 harvest is forecasted to add to this trend and is expected to be higher than its 2014-15 harvest. Using the 2013-14 production figures as an estimate of the 2015-16 harvest, maize surplus in the district would be of 256,000 tonnes exceeding the Nyarugusu Refugee

Camp food requirement by 92.6 per cent, beans surplus would be at 132,000 tonnes exceeding the Nyarugusu Refugee Camp's food requirements by 95.5 per cent while palm oil would still be in deficit having to import 2,200 tonnes.

Looking at average production figures, Kasulu tends to produce enough food to meet local demand. **Table 12** shows that on an average year Kasulu tends to produce enough to satisfy all demand in the district as well as having a sizeable surplus to sell outside the district. This is especially the case for maize and beans. As displayed earlier in **Table 10** agriculture production levels have been increasing considerably over the past years due to a growing economy and high demand. Production levels are likely going to continue to increase in the coming years. Cooking oil though needs to be imported to ensure there is enough supply to meet actual demand.

Table 12: Kasulu agriculture production compared to camp requirement

Commodity	2013/14 Production (MT)	Average Production (MT)	2013/14 Consumption	Average Surplus	Annual Camp Requirement for 137,843 refugees (MT)	Camp Requirement as a % of Annual Surplus
Maize	405,968	299,473	150,000	149,473	18,856.90	12.62%
Beans	147,373	115,277	15,000	100,277	5,954.80	5.94%
Oil	2,810*	1,833	5,000	-3,167	992.5	54.15%**
Salt	NA	NA	NA	NA	248.1	NA
CSB	NA	NA	NA	NA	2,481.20	NA

*2012-13 production figures
** Camp requirement compared compared to deficit
Source: Tanzania Market Assessment

Looking specifically at Nyarugusu Refugee Camp's food requirement even when taking into consideration external trade requirements, on an average year, there would seem to be enough food to meet the Camp's food need requirements. In an average agriculture harvest year, Kasulu would have approximately 26,000 tonnes of maize and 22,000 tonnes of beans for internal trade, which is enough to cater for Nyarugusu Refugee Camp's requirement of approximately 19,000 tonnes of maize and 6,000 tonnes of beans leaving approximately 7,000 tonnes of maize and 16,000 tonnes of beans for internal trade within the district (**Table 13**). Taking into to consideration that 2015-16 harvest is expected to be above average in Kasulu and that other regions in Tanzania are also expected to have produced more in 2016, Kasulu seems to have adequate food (maize and beans) supplies to also support the Nyarugusu Camps' food requirement.

Table 13: Overall Kasulu food availability compared to camp requirement

Commodity	2013/14 Annual Surplus	Annual Average Surplus	External Trade %	External Trade (MT)	Surplus (MT)	Total Camp Annual Requirement (MT)	Surplus remaining for Internal (Kasulu) Annual Trade (MT)
Maize	255,968	149,473	82.7%	123,614.2	25,859	18,856.90	7,002.1
Beans	132,437	100,277	77.9%	78,115.8	22,161	5,954.80	16,206.2
Palm Oil	-2,190	-3,167	74%	NA	NA	992.5	NA

Source: Tanzania Market Assessment

4.6: Storage facilities

Kasulu's storage facilities are limited. Traders and farmers tend to store food in their homesteads and occasionally in appropriate warehouses. NCM has no adequate storage facility. Some local traders tend to store their food in a small office room or in an open space under the NCM market roof. However, the market structure seeps rain making it therefore risky to store food in the market during the rainy season as food may likely get spoilt. **Figures 10** and **11** show the situation during a normal rain shower where people are forced to attend to the water seeping through ensuring their food does not get wet. NCM is located on the lower-end of the camp with no purpose-built drainage system in place. As a result run-off water quickly accumulates in the market during rains, turning the market into a big pool. With the public toilets located on the outskirts of the market, accumulated rainwater causes these toilets to overflow, spreading excrement throughout the market whenever it rains. This makes the sale of food let alone food storage very difficult and problematic in NCM, especially during the rainy season. Good Neighbours (an NGO) has recently contracted a local construction firm to repair the leaking market roof, to put in place a drainage system in the market and to build a food storage area. Even though this is a step in the right direction, works are yet to commence.

Figure10 & 11: Storage constraints in NCM

Source: Tanzania Market Assessment

Even without proper storage facilities, NCM manages to trade 70 tonnes per week. The Camp's total food requirement (for 137,843 refugees) is 543 tonnes per week. For a reduced case load of 10,000 people, the requirement would be 39.4 tonnes amply being covered by the current local trade volumes. However, when factoring in normal local trade volumes in the market (70 tonnes) this requirement would increase to 109.4 tonnes. Market structural improvements including increased storage capacity are required before the introduction of a CBT food assistance intervention modality in order for the market to be able to accommodate the expected increase in traded volumes led by the CBT cash injection (**Table 14**).

Table 14: Overall NCM food availability compared to camp requirement

Market	NCM current trade per week (MT)	Population Assisted	Total Food Requirement per week (MT)					Total storage - Local Requirement per week (MT)	Current trade minus weekly refugee requirement
			Maize	Beans	Cooking Oil	Salt	CSB		
Nyarugusu Refugee Camp	70	137,843	393	124	20.7	5.2	51.7	543	**Current trade volume is 7.8 times below total trade requirement for the Camp per week**
Target Refugee Group	70	10,000	28.5	36	6	1.5	3.8	39.4	**Current trade volume is 0.6 times above total trade requirement per week. However current volume traded remains below trade requirement when factoring-in normal market trade volumes per week (70MT)**

Source: Tanzania Market Assessment

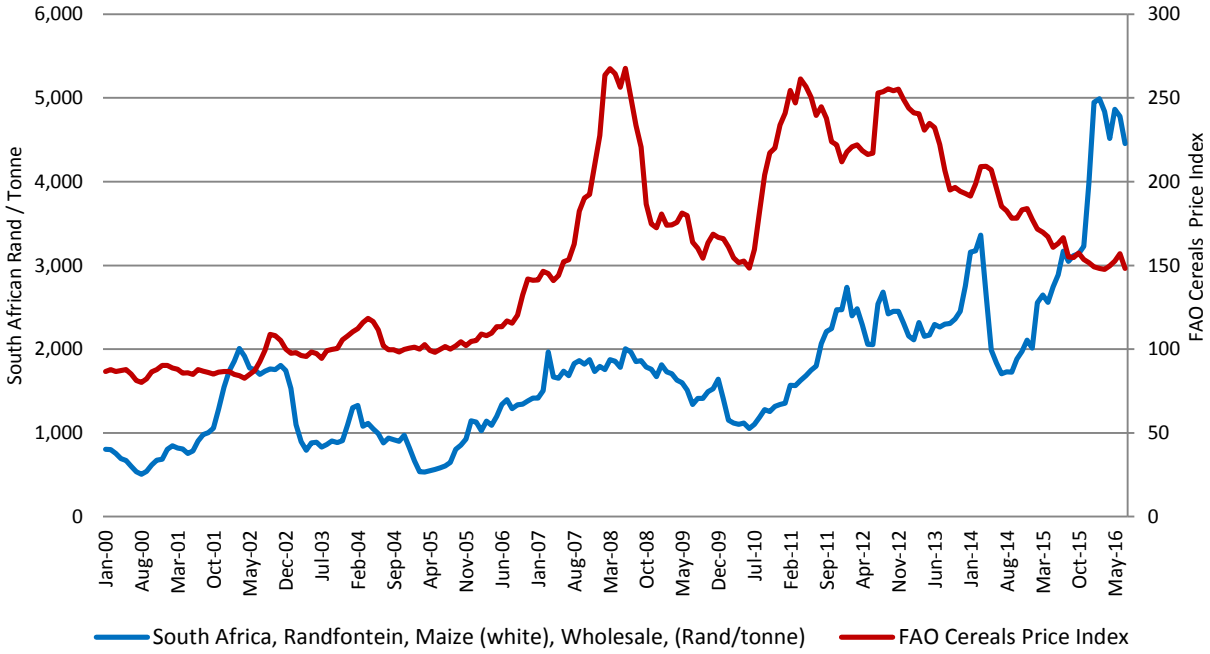
Section 5: Food Access

Tanzania is a largely free-market style economy where demand and supply guides both formal and informal trade of food commodities. Due to Tanzania's favourable trade location, the Government tends to interfere minimally with the country's food market trade. However, when it does, it does so primarily in the form of import taxes to support local production and trade for example by applying an 18 per cent VAT on all imported foods into Tanzania. The government also applies restrictive policies vis-à-vis genetically modified organisms (GMO) crops, banning their use and trade in the country. Tanzania at the moment employs no food export restrictions and taxes.

5.1: Food prices

When compared to world cereal prices, the price of white maize in the region, specifically in South Africa, has recently been increasing contrary to the international cereals price trend. **Figure 12** clearly shows this inverse trend, where FAO's Cereals Price Index illustrates that over the past 3 and a half years the price of cereals have been falling to seven-year-low levels while conversely the wholesale price of white maize in South Africa has instead sharply increased since September 2014. An important reason behind the increase in South Africa's wholesale white maize price is led by the ratio of white to yellow maize produced in the world. Only around 5 per cent of world annual maize production is white, the remaining 95 per cent being yellow. Moreover, southern African culinary habits are also affecting the price increase as white maize is the most preferred staple for human consumption in the region; yellow maize being largely used for animal feed. The two consecutive drought years experienced in the region (2014-15 and 2015-16), which were exacerbated by one of the worst El Niño weather events in 35 years in addition to 2015 being recorded as the hottest year on record for South Africa, have significantly reduced cereal stocks and crop production levels in the region, where an important proportion of the world's white maize grain is grown. Global stock of white maize grain has reduced as a result pushing-up white maize prices across Southern Africa.

Figure12: Comparing South African White Maize & FAO Global Cereal Price Index Trends

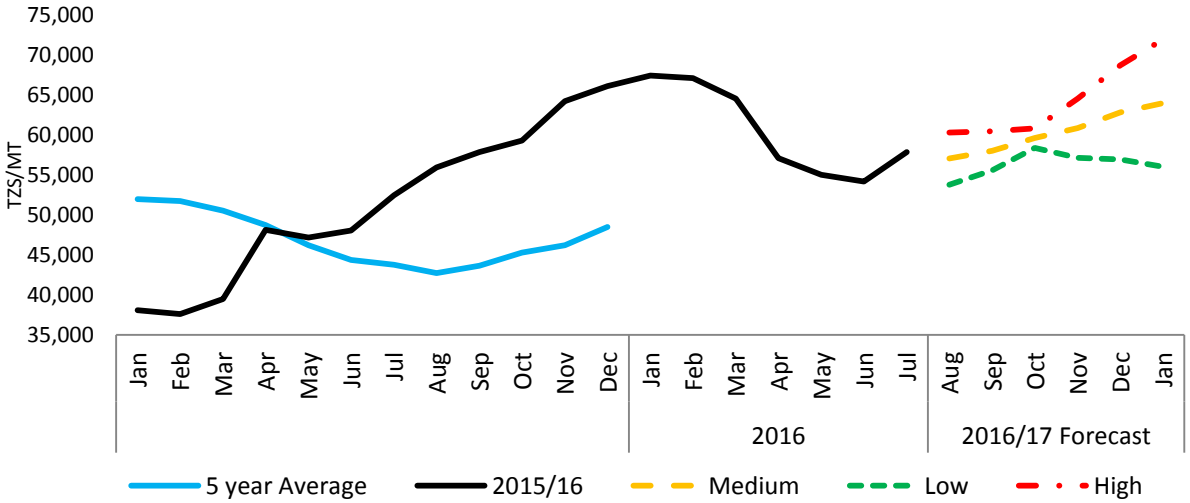


Source: FAO GIEWS

Together with Zambia, Tanzania has been one of the few maize surplus producing countries in southern Africa during a period of regional maize production deficits. This has meant that demand for Tanzanian maize has increased hereby also pushing-up maize prices accordingly. Food prices in Tanzania therefore will be affected by South African food price trends. As shown by **Figure 13** the wholesale price of white maize in South Africa has skyrocketed from an average of RSA 3,226.52 per tonne in November 2015 to an average of RSA 4,991.57 per tonne in February 2016 representing an increase of 54.7 per cent over 3 months. The South African Foreign Exchange (SAFEX) price of white maize in August 2016 was on average 100 per cent above its five year average for the time of year. This has had a fall-on effect on the nominal maize prices across southern Africa; Tanzania is not an exception.

Food prices in Tanzania began to increase sharply as of June 2015 when the regional shortfall from the 2014-15 harvest became clear and demand for Tanzania's excess maize grain stocks started to pick-up (**Figure 13**). As a result the Tanzania national average nominal maize grain price per tonne rose to 35 per cent above its five year average level in January/February 2016. Maize prices in Tanzania fell during the post-harvest period but have been increasing again since July 2016, two to three months earlier than usual. In July 2016 Tanzania's national wholesale white maize price stood at 32 per cent above its five year average level (up from 22 per cent in June 2016) and will likely continue to increase until March 2017 as the lean season takes hold in the region (**Figure 13**).

Figure 13: Tanzania national wholesale white maize 2016 forecast price (TZS/MT) compared to the 2015 price and the five-year average trend

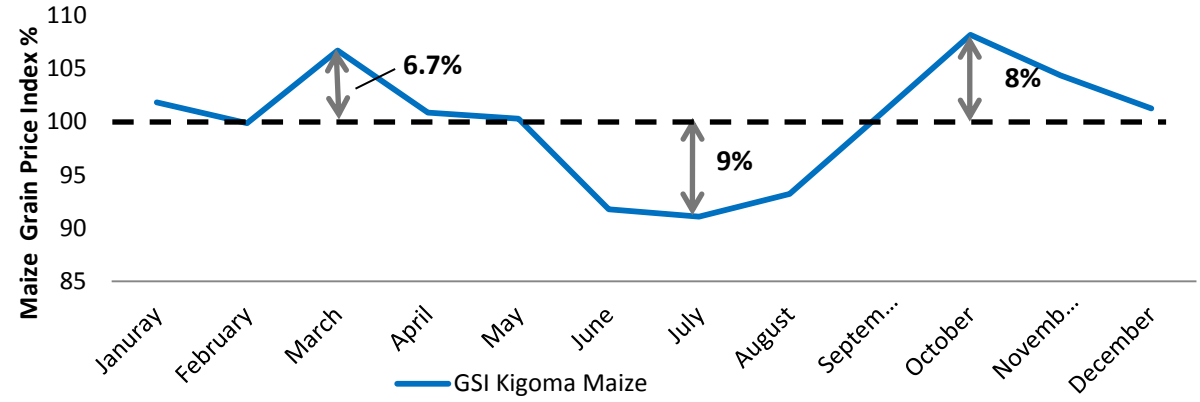


Source: WFP VAM Portal

This report's price analyses used 2010 – 2016 nominal wholesale prices of maize grain provided by the National Bureau of Statistics (NBS). The government of Tanzania only collects food prices at provincial level meaning that prices for Kasulu district are captured at the Kigoma province level. Price data was not available for tertiary and secondary markets. Food price data provided by NBS covers three commodities; maize grain, beans and rice and only at wholesale level.

Figure 14 shows maize grain food prices in Kigoma to be seasonal. Prices increase by nearly 7 per cent above the annual average (at 100) in March which represents the peak of the lean season to then fall to 9 per cent below the annual average in July (post-harvest period), to then reach 8 per cent levels above the national average in October (start of the lean season).

Figure14: Tanzania maize grain grand seasonal national price index 2010-2016

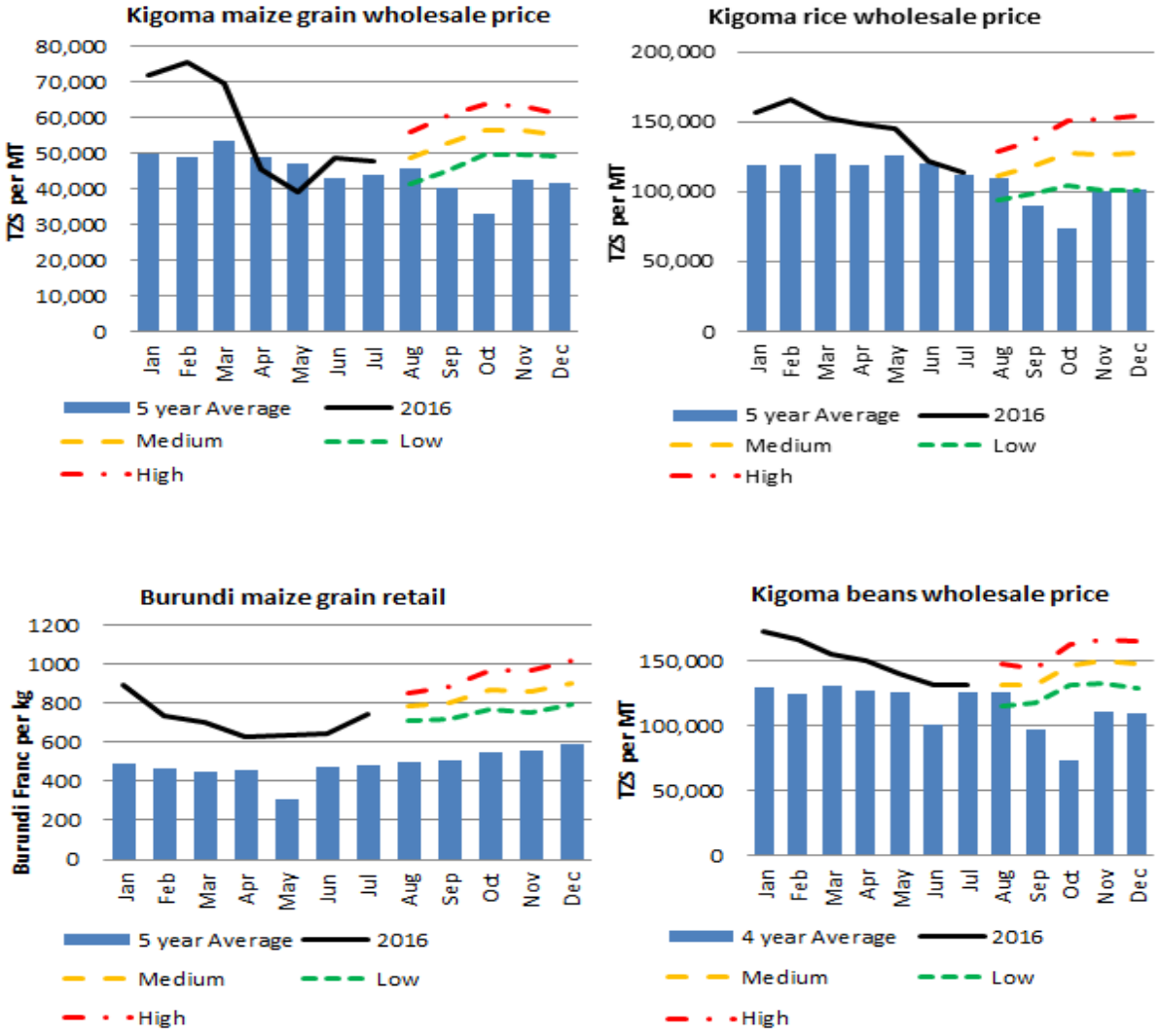


Source: WFP VAM Portal

Figure 15 below shows that even though the price of maize, rice and beans in 2016 is higher than the four and five year averages for the time of year, key staple food prices in Kigoma are actually falling. The price of beans and rice in the coming months are expected to follow average trend levels while for maize grain prices have been falling sharply over the past months but have recently leveled off at five year average levels. Further strengthening the notion that the maize harvest in the region has been good this year.

Contrary to Kigoma's price trend, the national retail maize grain price in Burundi is well above its five-year average level for the time of year and prices have been increasing since June 2016. Future price estimates indicate that maize prices in Burundi over the next 5 months will either remain stable (low price projection) or increase (medium and high price projection) above the current price. All Burundi price projections estimate that maize prices will be higher than their five-year average indicating possible increased Burundian demand for cheaper Tanzanian maize.

Figure 15: Food prices in Kigoma and Burundi



Source: WFP VAM Portal

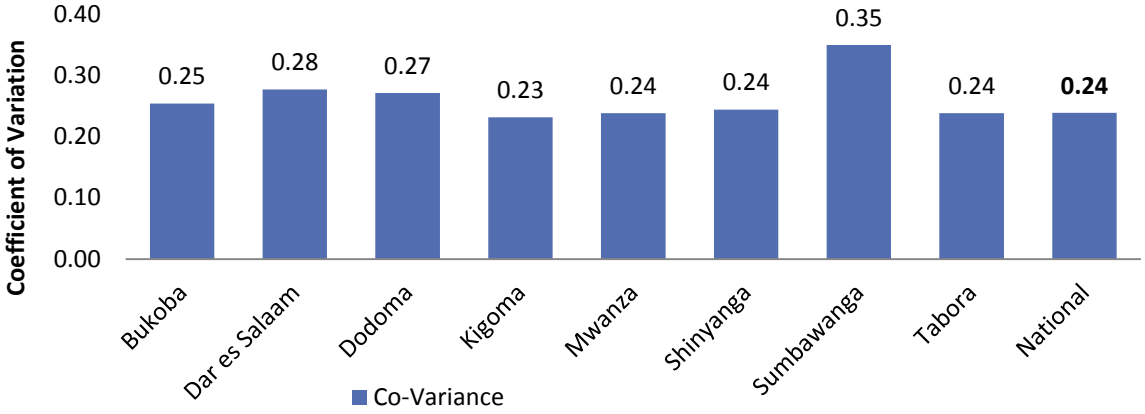
Price volatility is measured by taking the current price of a good and measuring its gap (numerical difference) to the average price for the period analyzed. This analysis is computed through the coefficient of variation[18] which indicates the level of dispersion prices have from their mean. The coefficient of variation provides a useful understanding of how prices have changed in the past and uses this information as a useful indication as to the probable changes in price levels in the future. With little variation in price overtime, it is possible to forecast that prices will tend to remain relatively stable while with a high reported price variation the opposite is likely to occur. This is a

[18] Coefficient of variation is calculated as the ratio of the number of standard deviation a particular figure has from the mean/average figure for the sample.

useful indicator which helps reduce uncertainty for decision makers and provides evidence to support market based response options.

With a national average price variation of 0.24 (or 24 per cent) on one tonne of white maize grain during January 2010 – July 2016, **Figure 16** further confirms Tanzania's variable maize grain prices (**Figure 13**). Maize grain price variability in key province markets (tertiary markets) across Tanzania tend to be high averaging between 0.23 (or 23 per cent) in Kigoma to 0.35 (or 35 per cent) in Sumbawanga. This is an indication that food prices in Tanzania vary considerably between seasons and years.

Figure 16: Comparing maize meal coefficient of variation for Kigoma and key Provinces over time 2010-16



Source: WFP VAM Portal

5.2 Market price integration[19]

Market integration analysis forms an important component in understanding market functionality. Markets are said to be integrated when price changes of a food commodity move in parallel and by the same extent between different markets and when goods flow freely between markets.

Correlation coefficients are an added useful indication of market functionality[20]. Price correlation coefficients of 0.8 and above suggest markets are strongly integrated, with a correlation coefficient of 1.0 representing two completely integrated markets[21]. Instead a correlation coefficient of 0.69 or below represents weak market integration.

It is important to note that more contextual information such as, and not limited to: number of traders, storage capacity, source of food, trade constraints and food availability need also to be analysed for market integration assessment. These will help in consolidating the significance of the correlation coefficient data towards identifying two markets' degree of integration and will provide a more holistic understanding of the capacity of a market and why price changes have and are occurring as observed.

[19] Prices for Mokhotlong District are not included due to insufficient maize meal price data for 12.5kg bags

[20] WFP Market Analysis Framework, December 2011

[21] Price levels do not have to be identical for markets to be integrated. In fact market prices for the same product are rarely at the same level between different markets due to varying transport costs and varying number of actors on a markets' supply chain. To be fully integrated, prices for the same commodity in different markets will have to change by exactly same amount (per cent ratio of the final selling price) across different markets. Furthermore, it is important to note that it is not possible to use correlation coefficients alone as a proxy for market integration as other unobservable factors may be driving the price trends.

Table 15 correlates the average price of a MT of maize grain across close-by and key market provinces in Tanzania between January 2010 and July 2016. The table shows a list of neighbouring and key provincial markets where strong maize grain price correlation is found between two markets (dark green colour in the table), hereby suggesting that these markets are likely to be well integrated in maize grain trade. The table also shows where weaker maize grain price correlation exists between markets (light green and white). From the table it seems that Kigoma is relatively well connected in maize grain trade with markets in close-by and key provinces in Tanzania.

Table 15: Correlation Coefficients of nearby and key markets for Kigoma district

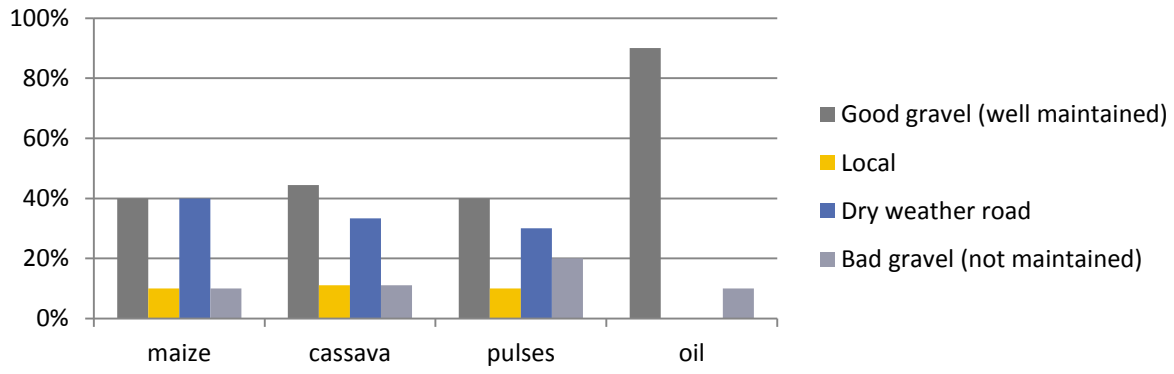
	Bukoba	Dar es Salaam	Dodoma	Kigoma	Mwanza	Shinyanga	Sumbawanga	Tabora
Bukoba	1.00							
Dar es Salaam	0.76	1.00						
Dodoma	0.66	0.90	1.00					
Kigoma	0.72	0.77	0.77	1.00				
Mwanza	0.79	0.75	0.66	0.76	1.00			
Shinyanga	0.78	0.85	0.86	0.83	0.76	1.00		
Sumbawanga	0.73	0.82	0.81	0.77	0.64	0.78	1.00	
Tabora	0.71	0.82	0.79	0.84	0.70	0.81	0.80	1.00

Source: WFP VAM Portal

5.3: Market access

In general physical market access in Kasulu district tends to be problematic with markets connected through difficult roads. As a result, a majority of households in Kasulu district live close-by to markets. **Figure 17** shows that 50 per cent of market traders for maize are either connected to their main maize source through well maintained gravel roads or access their food locally while the remaining 50 per cent use dry weather roads (only drivable in dry conditions) or badly maintained roads to reach their main maize source. The data is similar for cassava and pulses where 54 and 50 per cent of traders respectively are connected through well maintained gravel roads or access their food locally. Cooking oil instead is largely (90 per cent) connected through well maintained gravel roads to its source market which tends to be in Kigoma Town or outside the Kigoma Region (mainly from Dar es Salaam).

Figure 17: Road type to food commodity source market

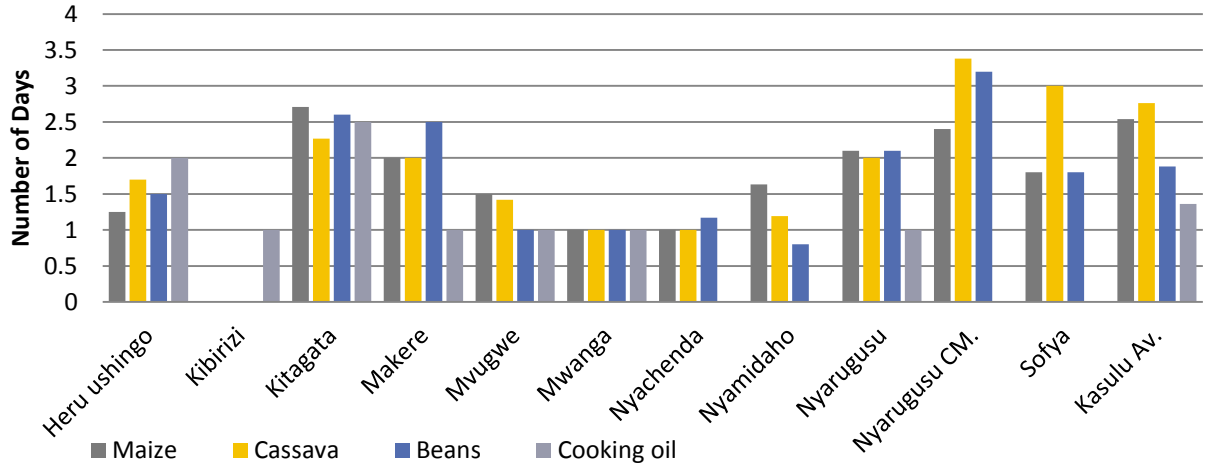


Source: Tanzania Market Assessment

Nevertheless, average market restocking days in Kasulu per commodity are low outlining functioning markets. **Figure 18** illustrates that the average number of days it takes for a market to restock from its source is between 1 and 3.5 days. The number of restocking days are not influenced by the type of commodity restocked, but are instead related more to the market. From the graph it is clear that

the market in the Nyarugusu refugee camp takes longest to restock especially regarding cassava and beans since NCM largely depends on supplies from other villages as opposed to other markets which easily procure stocks from within the village and the village's direct surroundings

Figure 18: Average restocking days in Kasulu by commodity



Source: Tanzania Market Assessment

Market access in Nyarugusu's Camp though is a bit more complicated. Refugees do have access to NCM and a secondary informal market in the refugee camp which on average is around 30 minutes' walking distance from refugees' homesteads. Refugees also have access to the food distribution centre also located around 30 minutes' walking distance from their homesteads. However, refugees' movement is nonetheless limited with access to markets outside Nyarugusu Refugee Camp restricted, hereby limiting access to a wider selection and possibly cheaper food.

Table 16 shows that while commodities such as maize grain and beans are cheaper in NCM than on average across markets in Kasulu (possibly due to WFP's distribution of maize meal and split peas) other food commodities such as rice and cassava flour are more expensive in NCM. Furthermore, some food commodities such as cassava dry, maize meal and cooking oil are not found in NCM while they are available in other local markets in Kasulu. For maize meal and cooking oil this is probably down to WFP's provision of these items through its food distribution, while the lack of cassava dry on NCM is likely related to the lack of milling facilities in the camp or down to the season since availability of cassava dry across the region was limited even though some markets had availability.

Table 16: Comparing April 2016 food prices food items across a Kasulu average and NCM

TZN/Per Kg	Maize Grain	Maize Meal	Rice	Cassava (dry)	Cassava Flour	Beans	Cooking Oil	Palm Oil	WFP Oil
Kasulu	465	700	1,374	466	439	1,380	800	1,990	2,800
NCM	364	NA	1,500	NA	600	1,335	NA	NA	NA

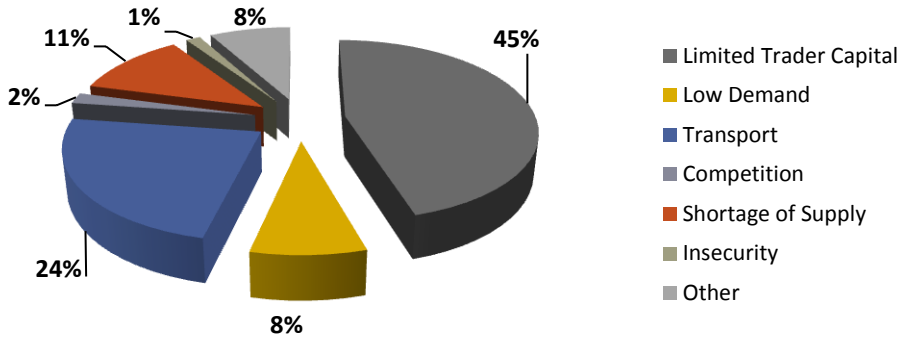
Source: Tanzania Market Assessment

Section 6: Market Constraints

6.1: Market Constraints

General barriers preventing trade in Kasulu were: limited trader's capital (affecting 45 per cent of traders), transport issues (mentioned 24 per cent of times and related to poor roads and high transport costs) shortage of supply (mentioned 11 per cent of times) and high competition from both within and outside the district (8 per cent) – **Figure 19**.

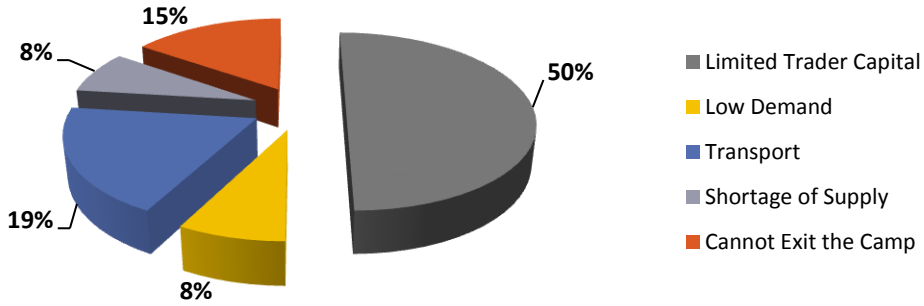
Figure 19: Traders' general constraints in Kasulu



Source: Tanzania Market Assessment

When looking specifically at general barriers to trade for NCM traders, they mentioned similar constraints with similar proportions. These were: limited trader's capital (affecting 50 per cent of traders), transport issues (mentioned 19 per cent of times and related to poor roads and high transport costs) shortage of supply (mentioned 8 per cent of times) – **Figure 20**. In addition 15 per cent of traders (all from traders in NCM) also mentioned exit restrictions were also affecting their trade.

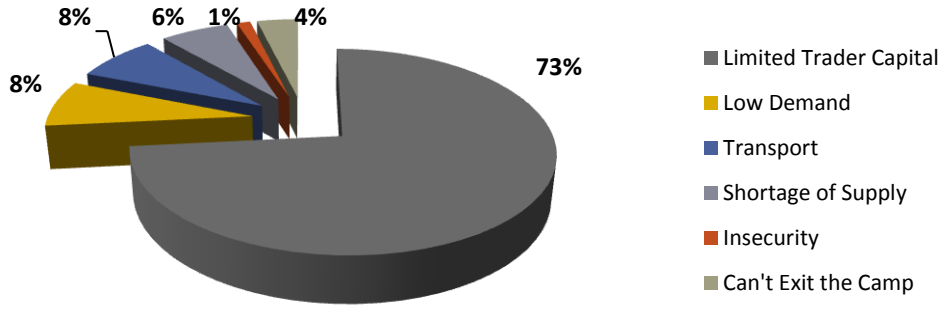
Figure 20: Traders' general constraints in NCM



Source: Tanzania Market Assessment

When questioned further to give their top single constraint preventing them from increasing their trade business, traders in Kasulu mentioned the following: 73 per cent of traders mentioned limited capital as a top constraint, while 8 per cent of traders mentioned low demand and transport issues as top constraints with a further 6 per cent mentioning shortage of supply, 3 per cent (all from traders in NCM) mentioning their inability to exit the Nyarugusu Refugee Camp and 1 per cent mentioned insecurity as a top constraint (**Figure 21**). The main single top constraint was lack of trader capital which was reported 56 per cent of times as the most important constraint affecting a trader's business in Kasulu.

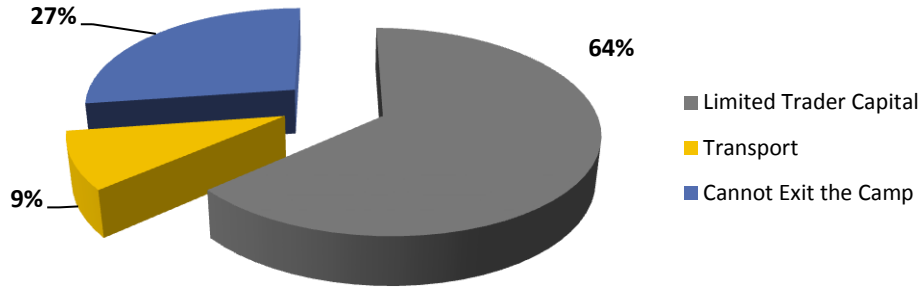
Figure 21: Kasulu Traders' single most important constraints to trade



Source: Tanzania Market Assessment

Again similarly to other traders in Kasulu, trader in NCM mentioned their top most important constraint affecting trade to be limited trader capital (64 per cent of traders). Over a quarter of traders (27 per cent) in NCM mentioned that their restrictions limiting movement from the camp were the single most important constraint limiting their business (**Figure 22**). Furthermore, just under 10 per cent of traders in NCM mentioned that transport was an issue affecting their trade levels. At 45.5% traders lack of own capital was mentioned as the single most important constraint by traders in NCM to improving their trade.

Figure 22: Traders' general constraints in Kasulu



Source: Tanzania Market Assessment

Section 7: Conclusions

The market assessment has analysed numerous market components and uncovered a wealth of information. The assessment looked at Tanzania's macro-economic context and agricultural sector. Specifically the assessment covered Kasulu traders in depth assessing the district's ability to provide enough food to feed the refugees hosted in the Nyarugusu Refugee Camp. The assessment assessed Kasulu trader's ability and volume of trade, market interconnectedness as well as traders' ability to expand production to meet demand. Road types to source markets were looked into as well as storage capacity and constraints to trade. Food price trends and analyses over time as well as forecasting future price trends were also undertaken.

The assessment found that food markets in Kasulu are functioning, including the Nyarugusu Common Market (NCM). Food in the region is ample and production levels are increasing year on year. The ability of most, if not all, traders in Kasulu, to procure food within three days throughout the year demonstrates good market functionality and food supply chains in the country. Trade is also rife especially with neighbouring countries such as Burundi, Uganda, Rwanda, DRC and South Sudan where over 80 per cent of the region's surplus food goes to on an annual basis. Nevertheless, a

series of issues need to be looked into to improve the region's food trade. The single most important trader constraint mentioned was limited consumer liquidity, an issue CBT can address. Markets need to be formalized and access, specifically roads, need to be improved. Proper storage facilities other than in the homestead need to be built.

Infrastructural issues are a particularly important constraint for NCM, as the market has no storage structure. Furthermore, water seeps through the roof of the market when it rains, drenching food and spoiling it. As the market lies on the lower end of the camp, it receives a lot of run-off water during the frequent heavy rains affecting the region. The poor drainage system in the market means that floods occur often, filling-up nearby pit-latrines and spreading excrement across the market floor. Improvements to NCM are necessary prior to WFP commencing market based food assistance.

Moreover, the refugees' restricted access to visit surrounding markets to purchase their food has meant that the price of food in NCM is by-and-large higher than in surrounding markets. Availability of a diverse set of food commodities is instead lower than in surrounding markets.

Continued further in-depth analyses, such as through collecting data on national, provincial and district food production levels, monitoring of food prices, monitoring cross-border trade flows and monitoring market functionality and volumes traded throughout the year, can and should be undertaken. This will allow better understanding of Kasulu's food market trade evolution over time, ensuring WFP can track the impact of its CBT intervention modalities on market trends. An in-depth review of the market data for CBT intervention modality selection in Nyarugusu is available (refer to the WFP Nyarugusu Cash Based Transfer Response Options Report).

The key question to answer remains availability of adequate food supplies on local markets for the upcoming lean season as the Tanzanian Government is yet to release its official agriculture harvest figures for the country for the 2015-16 planting season. WFP will have to follow-up with the Ministry of Agriculture to ensure the Organization's Staff have access to reliable, accurate and up-to-date data for the region.

Section 8: References

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Section 9: Annex

Annex 1: Terms of Reference

Background

Despite various regional and international efforts taken to enhance social and political stability in the Great Lake Region, political instability has remained a major challenge among the neighboring countries. This has caused atrocities and other social unrest that resulted to populations' displacements both internally as well as fleeing their countries to seek for refuge.

For more than 40 years, Tanzania has hosted refugees from neighboring countries, notably Rwanda, Burundi and the Democratic Republic of Congo (DRC). Improved security conditions in Rwanda and Burundi in recent years has facilitated orderly return of majority of these refugees and subsequent closure of Rwandese and Burundian camps and consolidation of Congolese camps in Tanzania. Until recently there was only one refugee camp remaining (Nyarugusu Refugee Camp) hosting a population of about 70,000 refugees from DRC and a small caseload of Burundian refugees considered to still need international protection. Renewed insecurities in Burundi in the first half of 2015 triggered by election processes saw a massive influx of over 100,000 Burundian refugees into the country and subsequent re-opening of two camps of Nduta and Mtendeli in Kibondo district.

Currently WFP Tanzania country office supports about 200,000 Congolese and Burundians refugees in through a Protracted Relief and Recovery Operation (PRRO) entitled 'Food Assistance to Refugees in North-Western Tanzania' by providing food transfer that meets a minimum daily energy requirement of 2,100 kilocalories per person. Because of Government restrictions in refugees' movement outside the camp and engagement in economic activities, refugees have been mainly depending on WFP ration, with limited capacity to diversify their ration.

Several initiatives have been taken to address the need for livelihood diversification in the camp settings, but most often faced government restrictions. In the recent development, the Government is now supporting the cash based transfer initiatives and reopened the common market in the Nyarugusu Refugee Camp to facilitate the process. This has put impetus on the possibility of changing food distribution modality from the traditional in kind donation to Cash Based Transfer (CBT) modalities.

The Country Office commissioned two assessments in Nyarugusu Refugee Camp, one in November 2013 to explore the feasibility of implementing a Cash Based Transfer in the camp by looking at the refugee households' preferences, market systems and networks and the district agricultural production capacity to meet the needs of the host community and refugees. The assessment concluded there was potential to implement Cash Based Transfer in Nyarugusu Refugee Camp based on the district agricultural production capacity, market performance and conduct, and ability to absorb additional demands without affecting prices.

The January 2015 assessment was meant to lay out an implementation plan for a market-based operation in Nyarugusu Refugee Camp building on the 2013 assessment, and highlight prevailing local conditions that could facilitate or hinder a Cashed Based Transfer intervention. The assessment reviewed different solutions available in the country to facilitate CBT aiming at proposing different transfer modalities based on the identified selection criteria and weight.

Following the new influx of Burundian refugees and the time lapse from the two earlier assessments, the CO with support from the RBJ found the need to undertake a further comprehensive assessment which will validate the findings of the both the November 2013 and January 2015 assessments in Nyarugusu camp to facilitate smooth piloting of Cash Based Transfer, starting with about 10,000 vulnerable beneficiaries in July 2016. The assessment will go further to analyze and gain an 'actionable understanding' of the supply chains to markets in Kasulu district and Kigoma region as a

whole, to inform transfer modality selection and delivery mechanism, supply chain/retailer strategy and operational risk reduction.

Objective

The main objective of the Market Assessment is to support decision making process on appropriate transfer modality for refugees in Nyarugusu Refugee Camp, specifically for 10,000 vulnerable individuals, given the prevailing social economic situation of the host community.

Specific objectives of the assessment are as follows:

- Identify whether from a food supply perspective **local markets** have the **capability to absorb extra food demand** in the refugee camps without negatively affecting the market's food supply and price levels for both the refugees and the host population.
- Identify and map the **market structure** (key actors & institutions) and assess the **supply chain** for cereals (maize and maize meal), pulses (beans and peas), tubers (cassava, and sweet potato) and vegetable oil;
- Analyse **potential food suppliers** available within and outside Kigoma region;
- Analyse **demand management** that all food suppliers who can deliver at the correct time, price and place and correct quantity and good quality through Procurement process and procedures.
- Analyse **current and projected availability** of cereals, pulses, cassava and cooking oil on local markets;
- Establish the **level of market integration** between source and supply area/s;
- Analyse **market patterns** such as volumes stored and traded, price levels and trends, price setting behaviour, competition and seasonality;
- Analyse the market's **potential or capacity to respond to current and transfer-induced increases in consumer demand**, e.g. storage facilities, stocking levels, stock replenishment lead-time;
- Analyse **demand conditions** such as the vulnerable population's **physical and economic access** to local markets (including inflation patterns of food and non-food commodities, distance from markets and road access to markets, commodity preferences, commodity utilisation, etc.);
- Analyse the overall **market environment** including relevant government policies and regulations, road and transport infrastructure and the socio-political situation;
- Provide **recommendations**, including i) the most **appropriate assistance modality** for Nyarugusu camps in Kasulu district, ii) **transfer value** for the camp and iii) conceivable **scale of support** for either cash/voucher or in-kind based interventions as well as iv) how to **address identified bottlenecks** for traders to meet increased demand and strengthen respective supply chains.
- Build capacity of CO and SO staff in to independently prepare and implement market and supply chain assessments, analyse market data and prepare report for decision making.

Table 1: Districts to be covered by the market assessment

	District	Camp
1	Kasulu	Nyarugusu

Methodology

The WFP Regional Market Analyst will coordinate the market assessment and WFP Tanzania CO will lead in the facilitation and finalisation of the market assessment with support from Kasulu SO staff.

As part of the design and implementation of the market and supply chain assessment, the CO will review the assessment tools with support from the RB and SO.

The market and supply chain assessment methodology and tools will be agreed upon before commencing field data collection. Training on the use of the methodology will be done for the assessment team before proceeding to the field for data collection. The training will also include a piloting of the proposed tools as well as on the use of digital data collection (tablets) using ODK platform. A data and response analysis workshop will be undertaken at the end of the field data collection to inform the final market and supply chain assessment and response analysis report with clear recommendations to the management on the appropriate response modality to be undertaken.

Main Deliverables

- Tools and methodology for the assessment developed and accepted by both VAM and Logistics.
- CS/SO staff trained on market and supply chain assessment tools and processes, and their capacity to independently carry out such assessments is enhanced.
- Well-coordinated collection of field level market and supply chain data.
- Data analysis session facilitated with CO/SO staff to provide comprehensive market and supply chain report.
- Presentation of preliminary results to the management produced by early May.
- Market assessment and supply chain report produced, summarising the main findings from the secondary and primary data analyses, highlighting clear recommendations on the most appropriate food security response intervention per district. The first draft of the report is to be ready by end May as per the timeline below.

Timeframe

The assessment in the country is planned for a maximum of 17 days (from start to finish). This will cover the period from 19th April to 17th May (excluding the period from 2nd to 6th May when the RB Official will be out of the country). The write-up of the report (11 May – 5 June) will happen remotely.

An indicative schedule of activities is outlined in table below. Further reviewing may be considered to accommodate the proposed planning with the effective data collection and cleaning timing.

Table 1: Timeframe of the implementation of the Market Assessment

Key Activities	**1 - 20 April**	**21 - 23 April**	**25 - 28 April**	**9 - 10 May**	**11 - 15 May**	**16 - 28 May**	**30 May – 5 June**	**10 June**
1. Background literature review (continuous)								
2. Agreeing on methodology and Tools								
3. Training of data collection team								
4. Data collection								
5. Analysis of preliminary data & agreement on modality selection								
6. Formulate recommendations for response strategy								
7. Generation of key graphs, maps and tables to guide C&V programming								
8. Presentation of preliminary results to management								
9. Writing of draft report								
10. Review comments on draft report								
11. Market Assessment Report final release								

Annex 2: Questionnaire

SECTION 1. PRELIMINARY				
1.1a Interviewer Name				
1.1b Team Leader Name				
1.2 Date	|____||____|/|____||____|/2016 Day Month			
1.3 Region Code:	|_____|_____|		
1.4 District	|_____|_____|		
District Code *1=Kasulu* *2=Kibondo* *3=Kigoma Rural* *4=Kigoma Urban*				
1.5 Village:				
1.6 Market Name:				
GPS Coordinates:				
1.7.1 Y-coordinate (latitude)	S: |___|___|, |___|___|___|___|___|			
1.7.2 X-coordinate (longitude)	E0: |___|___|, |___|___|___|___|___|			
1.8 Access to shop	All Season	|___|	Dry Season Only	|___|
	Obstruction	|___|	Buses/trucks observed	|___|
	Pick-ups observed	|___|	Other:_____	|___|

INTRODUCTION		
Please read the following consent form: My name is _____ I am a WFP Staff Member. WFP is conducting a survey on food markets in Tanzania. I would like to ask you a few questions about food markets, which will take about one hour. Your name will not be recorded and any private information that you provide will be confidential and will not be disclosed to other people. Your participation is voluntary and you can choose not to answer any or all of the questions, if you wish to do so, however we hope that you will participate since your views are important to us. **1.9** Do you have any questions?		
1.10 May I begin?	**Yes** |_____|	**No** |_____|

SECTION 2: TRADER CHARACTERISTICS						
2.1	What activity are you involved in? (*insert the appropriate number in the space provided*)	|___|	1. **Wholesaler:** Purchasing from producers and traders at their store or at farm gate, selling to processors/ traders, using wholesale units			
			2. **Medium vendor:** Purchasing from producers and traders, selling to other traders and/or consumers, using both retail and wholesale units			
			3. **Retailer:** Purchasing from traders/producers, selling to ultimate consumers			
			4. Collector: Purchasing from farmers and selling to traders			
			5. Other: _____			
2.2	How many days a week does this market operate?	1. Daily	|____|	4 .Once a week	|____|	
		2. Every other day	|____|	77. Other: _____		
		3. Twice a week	|____|	99.I don't know	|____|	
2.3	To the best of your knowledge, provide an estimate of the number of traders per commodity in the market who operated in the same activity level as you do?			a. April-Aug (2015)	b. Oct– March (2015-16)	
			Cereals	|____||____||____|	|____||____||____|	
			Tubers	|____||____||____|	|____||____||____|	
			Pulses	|____||____||____|	|____||____||____|	
			Cooking Oil	|____||____||____|	|____||____||____|	
2.4	To the best of your knowledge, provide an estimate of the current and future projected number of traders per commodity in the market operating at the same activity level as you do?			a. April-Aug (2015)	b. Oct 2016 – March 2017	
			Cereals	|____||____||____|	|____||____||____|	
			Tubers	|____||____||____|	|____||____||____|	
			Pulses	|____||____||____|	|____||____||____|	
			Cooking Oil	|____||____||____|	|____||____||____|	
2.5	Please indicate the most important food commodity you normally sell in terms of volume per food category?		1. Local / national Maize		2. Imported Maize	
			3. Maize Meal imported (int. origin)		4. Maize Meal local millers	
			5. Rice		6. Sorghum	
			7. Millet		8. Cassava Dry	
			9. Cassava Fresh		10. Sweet Potatoes	
			11 Irish Potatoes		12. Local/national beans	
			13. Cow peas		14. Bambara nuts	

					15. vegetable oil (imported)			16. Vegetable oil (national)
					17. Palm oil (local)			77. Other
	Cereals	|__|	Tubers	|__|	88. Not Applicable			
	Pulses	|__|	Cooking Oil	|__|				
2.6	In what year did you establish your shop?				|__|__|__|__|			
2.7	Do you sell your produce all along the year?				|____|	1. Yes		2. No (seasonal seller)
2.8	Trader gender				|____|	1. Male		2. Female
2.9a	How many shops where you sell food items do you own?				_____			
2.9b	If more than 1 in 2.9a, where are the other shops located?				_____			
2.10	Number of workers?				_____			
2.11 a	Does the business premise have power e.g. generator or solar?				|____|	1. Yes		2. No
2.11 b	Freezer in use?				|____|	1. Yes		2. No
2.12	How do you record your sales and stocks?				|____|	1. Manually (paper)	2. Computerized	3. With a Point of Sale (PoS) Terminal / 4. Other_____
2.13	Does your shop comply with the local authorities' standards of food quality?				|____|	1. Yes	2. No	3. I don't know
2.14 a	Do you have a valid food trading license/ are you legally registered in order to operate?				|____|	1. Yes	2. No	3. I don't know
2.14 b	If not, are you able or willing to obtain a trading license?				|____|	1. Yes	2. No	3. I don't know
2.15	Shop Structure	|___| Permanent			|____| Semi-permanent (thatch/ mud in some context, wood /iron in others)	|___| Open air (mobile)		Other_____ _____

SECTION 3: FLOW OF COMMODITIES					
3.1	Please provide an estimate of the average quantities (mt) purchased, to be purchased, sold and to be sold per **WEEK** of the four most important food commodities (**see 2.4**)	**Purchased/to be purchased**		a. April – Aug 2015	b. Oct 2015 – March 2016
		3.1.1	Cereals	|____|____|____|____|	|____|____|____|____|
		3.1.2	Tubers	|____|____|____|____|	|____|____|____|____|
		3.1.3	Pulses	|____|____|____|____|	|____|____|____|____|
		3.1.4	Cooking Oil	|____|____|____|____|	|____|____|____|____|
		Sold/to be sold		a. April – Aug 2015	b. Oct 2015 – March 2016
		3.1.5	Cereals	|____|____|____|____|	|____|____|____|____|
		3.1.6	Tubers	|____|____|____|____|	|____|____|____|____|
		3.1.7	Pulses	|____|____|____|____|	|____|____|____|____|
		3.1.8	Cooking Oil	|____|____|____|____|	|____|____|____|____|
3.2	How often do you restock during the different seasons of the year (**number)**	**3.2.1**	Cereals	|____|____|	|____|____|
		3.2.2	Tubers	|____|____|	|____|____|
		3.2.3	Pulses	|____|____|	|____|____|
		3.2.4	Cooking Oil	|____|____|	|____|____|
3.3	How long does it take to get commodities restocked from main sources? (**DAYS**)	**3.3.1**	Cereals	|____|____|	|____|____|
		3.3.2	Tubers	|____|____|	|____|____|
		3.3.3	Pulses	|____|____|	|____|____|
		3.3.4	Cooking Oil	|____|____|	|____|____|
3.4	Please could you tell me the volume of purchase in a typical restocking trip by season (**mt**)?	**3.4.1**	Maize Grain	|____|____|____|____|	|____|____|____|____|
		3.4.2	Maize Meal	|____|____|____|____|	|____|____|____|____|
		3.4.3	Pulses	|____|____|____|____|	|____|____|____|____|
		3.4.4	Cooking Oil	|____|____|____|____|	|____|____|____|____|
3.5	Please indicate if your sales volume in this period (October 2015 – March 2016) has increased, decreased or remained the same as compared to the average year?	1. Increased markedly (> 50%)		2. Increased moderately (21%-49%)	
		3. Increased slightly (6% - 20%)		4. No change (+5% to - 5%)	
		5. Decreased markedly (> 50%)		6. Decreased moderately (21% -49%)	
		7. Decreased slightly (6%-20%)		99. I don't know	

	Cereals	|___|	Maize Meal	|____|	88. Not applicable	
	Tubers	|___|	Cooking Oil	|____|	77. Other:_____	

3.6	If there was a change in sales volume (if you answered 1, 2, 3, 5, 6, 7 to Q3.5), please provide the two most important reasons for this change? If No changes, insert "88" in the space provided	1. Better production within the district	2. More production from other districts
		3. Less humanitarian food aid distributed	4. Fewer traders/producers selling the same commodity
		5. More buyers from other districts	6. More capital available for trade
		7. Improved road infrastructures	8. Better inflows from neighbouring country
		9. Low production within the district	10. Less production in other district(s)
		11. More traders/producers selling the same commodity	12. More humanitarian food aid distributed
		13. Reduced demand from consumers	14. Less capital available for trade
		15. Deteriorated road infrastructure	16. Less inflows from neighbouring country
		17. Increased demand from customers	18. Increased number of refugees
		77. Other: (specify_____)	88. Not applicable
		1st reason |___|	2nd reason |___|

3.7	Where has been the source market or location of the most important commodities during the different seasons of a typical year?			a. May – Aug (2015)	b. Oct – March (2015-16)
		3.7.1	Cereals	|_____|	|_____|
		3.7.2	Source market (district)	|___||___||____|	|____||____||____|
		3.7.3	Distance to the source	|____||____||____| km	|____||____||____| km
		3.7.4	Tubers	|_____|	|_____|
		3.7.5	Source market (district)	|___||____||___|	|____||____||____|
		3.7.6	Distance to the source	|____||____||____| km	|____||____||____| km
		3.7.7	Pulses	|_____|	|_____|
		3.7.8	Source market (district)	|___||___||____|	|____||____||____|
		3.7.9	Distance to the source	|____||____||____| km	|____||____||____| km
		3.7.10	Cooking Oil	|_____|	|_____|
		3.7.11	Source market	|___||___||____|	|____||____||____|

			(district)		
		3.7.12	Distance to the source	|____||____||____| km	|____||____||____| km
3.8	Where will be the source market or location of the most important commodities during the different seasons of the year			a. April – Aug 2016	b. Oct 2016 – March 2017
		3.8.1	Cereals	|_____|	|_____|
		3.8.2	Source market (district)	|___||___||____|	|____||____||____|
		3.8.3	Tubers	|_____|	|_____|
		3.8.4	Source market (district)	|___||____||___|	|____||____||____|
		3.8.5	Pulses	|_____|	|_____|
		3.8.6	Source market (district)	|___||___||____|	|____||____||____|
		3.8.7	Cooking Oil	|_____|	|_____|
		3.8.8	Source market (district)	|___||___||____|	|____||____||____|
3.9	Is your main source for the commodities in April-Aug 2016 (see 3.8) different compared to May-Aug 2015 (see 3.7)?		1.Yes	2.No	|___|
3.9.1	If yes, please provide the most important reason for this change and rank by importance |____|	1. Better production within the district		2. Poor production within the district	
		3. More production from other districts		4. Less production from other districts	
		5. Lower purchase price at previous source		6. Higher purchase price at previous sources	
		7. More institutional procurement at previous source		8. Less institutional procurement at previous source	
		9. More effective demand from other district		10. Less effective demand from other districts	
		11. More supply from other districts and/or neighboring country		12. More demand from consumers	
		13. Improved road infrastructure		14. Deteriorated road infrastructure	
		15. Increased number of refugees		16. Lower demand from consumers	
		77. Other (Specify_____)			
		88. Not applicable			
3.10	Is your main source for the commodities in Oct 2016-March 2017 (see 3.8) different compared to Oct 2015 - March	1.Yes	2.No	|___|	

	2016 (see 3.7)			
3.10.1	If yes, (3.10) please provide the most important reason for this change and rank by importance |____|	1. Better production within the district		2. Poor production within the district
		3. More production from other districts		4. Less production from other districts
		5. Lower purchase price at previous source		6. Higher purchase price at previous sources
		7. More institutional procurement at previous source		8. Less institutional procurement at previous source
		9. More effective demand from other district		10. Less effective demand from other districts
		11. More supply from other districts and/or neighboring country		12. More demand from consumers
		13. Improved road infrastructure		14. Deteriorated road infrastructure
		77. Other (Specify_____)		
		88. Not applicable		
3.11	From whom do you buy the commodities at source markets	Cereals	|____|	1. Producers 2. Assemblers 3. Wholesalers 4. Medium vendors 5. Retailers 6. Processors 7. Supplied at selling point 88. NA 77. Other:_____
		Tubers	|____|	
		Pulses	|____|	
		Cooking Oil	|____|	

3.12	To whom are you primarily selling the commodities traded by season. (Fill out codes **below 3.14.1-3.14.8)**	1. Traders within the district	2. Traders outside the district and outside the province but within the country
		3. Traders outside the district but within the province	4. Traders in other countries (formal trade)
		5. Traders in other countries (informal)	6. Other traders in the same Ward
		7. Local consumers	8. Processors and institutions
		9.Wholesalers	10. Transporters/Distributors
		88. Not applicable	99. I don't know
		77. Other: (specify)_____	
	Commodity	a. April – Aug (2015)	b. Oct 2015– March 2016
3.12.1	Cereals	|____|	|____|

3.12.2	Tubers	|____|	|____|
3.12.3	Pulses	|____|	|____|
3.12.4	Cooking Oil	|____|	|____|
	Commodity	a. April – Aug 2016	b. Oct 2016 – March 2017
3.12.5	Cereals	|____|	|____|
3.12.6	Tubers	|____|	|____|
3.12.7	Pulses	|____|	|____|
3.12.8	Cooking Oil	|____|	|____|

3.13	Where do your customers come from?	|____|	From this village only
		|____|	From this village & other villages in this district radius (km): _____
		|____|	From this district and other districts i.e. _____

SECTION 4: RESPONSE CAPACITY AND CONSTRAINTS

4.1	Approx. number of clients per day by period for a typical year	a. Jan – March	|____|	1. Less than 20
		b. April – June	|____|	2. 20 -50
		c. July – Sept.	|____|	3. 50-100
		d. Oct. – Dec.	|____|	4. More than 100

4.2	According to your opinion, would the sale **PRICE** of the **commodities** increase, decrease or remain the same if **DEMAND** in this market would increase by 25%?	Cereals	|____|	1. No change
		Tubers	|____|	2. Decrease
		Pulses	|____|	3. Increase
		Cooking Oil	|____|	99. I don't know
4.3	If you expect an **INCREASE** of **PRICE**, do you think it would be temporary (until supply increases), or sustain (for the period of **DEMAND** increases)?	Cereals	|____|	1. Temporary
		Tubers	|____|	2. Sustained
		Pulses	|____|	88. Not applicable
		Cooking Oil	|____|	99.I don't know

			Yes				No			
4.4	Would you be able to absorb (no price inflation) an increased demand of :		Cereals	Tubers	Pulses	Cooking Oil	Cereals	Tubers	Pulses	Cooking Oil
	4.4.1	Up to 10%	|____|	|____|	|____|	|____|	|____|	|____|	|____|	|____|
	4.4.2	Up to 25%	|____|	|____|	|____|	|____|	|____|	|____|	|____|	|____|

	4.4.3	Up to 50%	|____|	|____|	|____|	|____|	|____|	|____|	|____|	|____|
	4.4.4	Up to 100%	|____|	|____|	|____|	|____|	|____|	|____|	|____|	|____|

4.5	Assume that demand from your customers for each commodity would increase by 50%, within what time frame would you deliver?	Cereals	|____|	1. No, I can't promise	2. Yes, within one week
		Tubers	|____|	3. Yes, within two weeks	4. Yes within one month
		Pulses	|____|	5. Yes, longer than one month	99. I don't know
		Cooking Oil	|____|	77. Other:_____	88. NA

4.6	What are your general constraints?			1. Lack of own capital	2. Lack of credit	3. High collateral requirements
				4. High interest rates on credit	5. High transport cost	6. Lack of means of transport
				7. Poor road infrastructure	8. High tax payment	9. Too much food assistance
				10. Low demand	11. Shortage of supply	12. Few people control the market
				13. Shortage of storage	14. Insecurity	15. Cost of selling license
	a	b	c	16. Seasonal business	17. Theft	99. I don't know
	1st |____|	2nd |____|	3rd |____|	18. Clients' liquidity availability	19. Competition from within other wards/villages	
				77. Other (specify_____)		

4.7	What is the most important constraint preventing you to substantially increase (double) the existing business? |____|	1. Lack of own capital	2. Lack of credit	3. High collateral requirements
		4. High interest rates on credit	5. High transport cost	6. Lack of means of transport
		7. Poor road infrastructure	8. High tax payment	9. Too much food assistance
		10. Low demand	11. Shortage of supply	12. Few people control the market
		13. Shortage of storage	14. Insecurity	15. Cost of selling license
		16. Seasonal business	17. Theft	99. I don't know
		18. Clients' liquidity availability	19. Competition from other wards	
		77. Other (specify_____)		

4.8	Do you believe there would be any security issues if cash is provided to beneficiaries in this district to buy food on the market?	a) Yes	b) No	c)If yes, please explain:
		|____|	|____|	

4.9	Do you have your own food transportation means?	|____|	1. Yes	2. No
4.10	If yes, capacity in MT	_____		

SECTION 5: CREDIT AND STOCK STRATEGY							
5.1	Do you provide credit to some of your customers? If no, skip 5.1.1, 5.1.2 and 5.1.3 and move to 5.1.4	|____|	1. Yes	2. No			
5.1.1	If yes (Q5.1), what share of your total sales for last month was on credit?	|____||____|%					
5.1.2	If yes (Q5.1), in which period of the year is your total sales on credit the highest?	Jan-March	|____|	Apr-Jun	|____|		
		July- Sep	|____|	Oct-Dec	|____|		
5.1.3	If no to **5.1**, why not?	|____|	1. Inflation	2. Not enough capital	3. Customers cannot pay back		
			4. Other (specify):_____				
5.1.4	Compared to the usual trend during this period, have there been any changes in the number of people who have been requesting credit?	|____|	1. Yes, more people	2. Yes, less people			
			3. No, the same number	99. No answer			
5.2	In the last two years, have you received credit to run your business?	|____|	1. Yes	2. No			
5.2.1	If no what was the main reason?	|____|	1. No need for credit	2. Need credit , but can't get it	3. High interest rate		
			4. High collateral requirements	5. Less amount available versus the need			
			77. Other (specify):_____				
5.2.2	If yes (Q5.2), from which source did you receive credit?	|____|	1. Grain traders, vendors	2, Formal finance institution	3. Informal money lender		
			4. Rural micro-finance	5. Mobile traders	6. Relatives and friends		
			77. Other (specify): _____				
5.3a	Do you own a bank account in one of the formal banks?	|____|	1. Yes	2. No	99. I don't know		
5.3b	If yes (5.3a) what bank are you with?	Bank name: _____					
5.3c	If no (5.3a)	|____|	1. Yes	2. No			

	are you willing to open a bank account?			
5.4	Are you in a position to supply and wait for payment for 3-4 weeks from the day you send your invoice?	|____|	1. Yes	2. No
5.5a	Do you have a mobile phone?	|____|	1. Yes	2. No
5.5b	If yes (5.5a) What is your phone network operator?	1. Airtel |____|	2. Halotel |____|	
		3. Tigo |____|	4. Vodacom |____|	
		5. Zantel |____|	6. Other:_____	
5.6a	Do you use mobile money as a saving service?	1. Yes	2. No	99. I don't know

5.6b	If yes to 5.5a, what mobile money /e-money service do you use?	Mobile money provider	1. Yes	2. No
		Airtel (Airtel Money)	|____|	|____|
		Halotel (Halo Pesa)	|____|	|____|
		Tigo (Tigo Pesa)	|____|	|____|
		Vodacom (M Pesa)	|____|	|____|
		Zantel (Ezy Pesa)	|____|	|____|
		Other:_____	|____|	|____|

5.7	Please grade the quality of service provider network in the Ward	Cellphone network provider	Excellent reception (always on)	Good reception (sometimes off – once a month)	Average reception (often off – every week)	Very unreliable (off most days)
		AIRTEL	|____|	|____|	|____|	|____|
		HALOTEL	|____|	|____|	|____|	|____|
		TIGO	|____|	|____|	|____|	|____|
		VODACOM	|____|	|____|	|____|	|____|
		ZANTEL	|____|	|____|	|____|	|____|
		OTHER	|____|	|____|	|____|	|____|

5.8	Where do you stock your commodities ?	|___|	1. No stocks (do not hold physical stock)	2. In my house	3. In my shop
			4. In my warehouse	5, In rented warehouse	6. In open space
			77. Other (specify _____)		99. I don't know
5.9	Total capacity of storage space? (Metres)	Length: _____ Width: _____ Height: _____			

5.10	What is the total capacity of your storage? (ask to see storage space if possible)	|____||____||____||____| mt				
5.11	Storage condition:	|__| Very Good	|__| Good	|__| Mediocre	|__| Poor	|__| Very Poor
5.12	Shop condition:	|__| Very Good	|__| Good	|__| Mediocre	|__| Poor	|__| Very Poor
5.10	What is your current stock level of your commodities?	5.10.1	Cereals	|____||____||____||____| mt		
		5.10.2	Tubers	|____||____||____||____| mt		
		5.10.3	Pulses	|____||____||____||____| mt		
		5.10.4	Cooking Oil	|____||____||____||____| Litres		
5.11	How do you rate the current market supply of the staple food commodities as compared to a typical year?	|____|		1. Above normal	2. Normal	
				3. Below normal	99. I don't know	
5.12	In your opinion, do you think that the current local production and stock owned by traders in this market is sufficient to meet the demand of consumers in the coming April – August 2016? Please answer by commodity	5.12.1	Cereals	|____|	1. Yes, local production is sufficient to meet the needs	
		5.12.2	Tubers	|____|	2. No, supply from other markets will be required during the end of the lean season	
		5.12.3	Pulses	|____|	99. I don't know what will happen	
		5.12.4	Cooking Oil	|____|	77. Other:_____	

SECTION 6: PRICES				
6.1	How are the retail selling prices of the listed commodities (on the right) determined in this market?	6.1.1	Maize Grain |____|	1. Prices are fixed by the Government 2. Prices are fixed by big vendors on the market 3. All traders set prices at the start of the market day 4. Prices are fixed by wholesalers outside the market 5. Prices are fixed by the traders association before the market begins 6. Each trader determines his/her own price 7. Prices are fixed by negotiation between buyer and seller 99. I don't know 77. Other: (specify_____)
		6.1.2	Maize Meal |____|	
		6.1.3	Pulses |____|	
		6.1.4	Cooking Oil |____|	
6.2	What is the current purchasing price of a unit for each of the four listed commodities?	6.2.1a	Maize Grain	One unit = _____ KG
		6.2.1b		|____||____||____||____||____|TZS
		6.2.2a	Maize Meal	One unit = _____ KG
		6.2.2b		|____||____||____||____||____|TZS
		6.2.3a	Rice	One unit = _____ KG
		6.2.3b		|____||____||____||____||____|TZS
		6.2.4a	Cassava (dry)	One unit = _____ KG
		6.2.4b		|____||____||____||____||____|TZS
		6.2.5a	Beans	One unit = _____ KG
		6.2.5b		|____||____||____||____||____|TZS
		6.2.6a	Cooking Oil	One unit = _____ L / cl
		6.2.6b		|____||____||____||____||____|TZS
		6.2.7a	Palm Oil	One unit = _____ L / cl
		6.2.7b		|____||____||____||____||____|TZS
6.3	What is the current selling price of a unit for each of the four listed commodities?	6.3.1a	Maize Grain	One unit = _____ KG
		6.3.1b		|____||____||____||____||____|TZS
		6.3.2a	Maize Meal	One unit = _____ KG
		6.3.2b		|____||____||____||____||____|TZS

		6.3.3a	Rice	One unit = _____ KG
		6.3.3b		|____||____||____||____||____|TZS
		6.3.4a	Cassava (dry)	One unit = _____ KG
		6.3.4b		|____||____||____||____||____|TZS
		6.3.5a	Beans	One unit = _____ KG
		6.3.5b		|____||____||____||____||____|TZS
		6.3.6a	Cooking Oil	One unit = _____ L / cl
		6.3.6b		|____||____||____||____||____|TZS
		6.3.7a	Palm Oil	One unit = _____ L / cl
		6.3.7b		|____||____||____||____||____|TZS
6.4	What do you expect the price of a unit for each of the four listed commodities to be in the months of:	6.4.1a	Maize Grain	One unit = _____ KG
		6.4.1b		June 16 |____||____||____||____||____|TZS
		6.4.1c		Jan 17 |____||____||____||____||____|TZS
		6.4.1d		Mar 17 |____||____||____||____||____|TZS
		6.4.2a	Maize Meal	One unit = _____ KG
		6.4.2b		June 16 |____||____||____||____||____|TZS
		6.4.2c		Jan 17 |____||____||____||____||____|TZS
		6.4.2d		Mar 17 |____||____||____||____||____|TZS
		6.4.3.a	Rice	One unit = _____ KG
		6.4.3b		June 16 |____||____||____||____||____|TZS
		6.4.3c		Jan 17 |____||____||____||____||____|TZS
		6.4.3d		Mar 17 |____||____||____||____||____|TZS
		6.4.4a	Cassava (dry)	One unit = _____ KG
		6.4.4b		June 16 |____||____||____||____||____|TZS
		6.4.4c		Jan 17 |____||____||____||____||____|TZS
		6.4.4d		Mar 17 |____||____||____||____||____|TZS
		6.4.5.a	Pulses	One unit = _____ KG
		6.4.5b		June 16 |____||____||____||____||____|TZS
		6.4.5c		Jan 17 |____||____||____||____||____|TZS
		6.4.5d		Mar 17 |____||____||____||____||____|TZS

		6.4.6.a	Cooking Oil	One unit = _____ KG			
		6.4.6b		June 16 |____||____||____||____||____|TZS			
		6.4.6c		Jan 17 |____||____||____||____||____|TZS			
		6.4.6d		Mar 17 |____||____||____||____||____|TZS			
		6.4.7a	Palm Oil	One unit = _____ KG			
		6.4.7b		June 16 |____||____||____||____||____|TZS			
		6.4.7c		Jan 17 |____||____||____||____||____|TZS			
		6.4.7d		Mar 17 |____||____||____||____||____|TZS			
6.5	Under the programme, WFP expects that the prices of food commodities are competitive and do not exceed the prevailing market prices. Are you willing to provide commodities at prevailing market prices?	|____|		1. Yes	2. No	3. I don't know	

SECTION 7: Write down any questions the trader may have

SECTION 8: OBSERVATIONS during market visit which are not captured by the Questionnaire

Thank You for your kind cooperation