Emergency Market Mapping and Analysis (EMMA)

Pilot Test 3, Haiti

Sept 29 – Oct 14, 2008

Key Findings and Recommendations

Market-system for Beans

Market-system for Timber

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Disclaimer

This report was produced in collaboration with staff from several participating organisations in Haiti: ACDI / VOCA, Haitienne Croix-Rouge, Canadian Red Cross and Oxfam GB. Unfortunately, most of the team members and managers were not able to give feedback on the final English version of this report – due to language translation barriers and the work pressures of the continuing humanitarian crisis in Haiti.

Therefore Practical Action Consulting bear sole responsibility for all information, recommendations and views expressed in this report.

Acknowledgements

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Each pilot is quite different from the other, and in Haiti, we were extremely lucky to have such an experienced team of participants; it's clear that each organisation put their trust in the EMMA process at a time when human resources were stretched.

Finally, for making the pilot such a vibrant and rich experience, rampant with discussion and question, we sincerely thank the Pilot three participants of Haiti, who certainly contributed towards the development of EMMA.

Abbreviations :

ADD	: Administration Départementale des Douanes
AGD	: Administration Générale des Douanes
DGI	: Direction Générale des Impôts
HH	: Household
IHSI	: Institut Haïtien des Statistiques et Informatiques
MCI	: Ministère du Commerce et de l'Industrie
MARNDR	: Ministère de l'Agriculture, des Ressources Naturelles et du Développement Rural
NGO	: Non-Governmental Organisation

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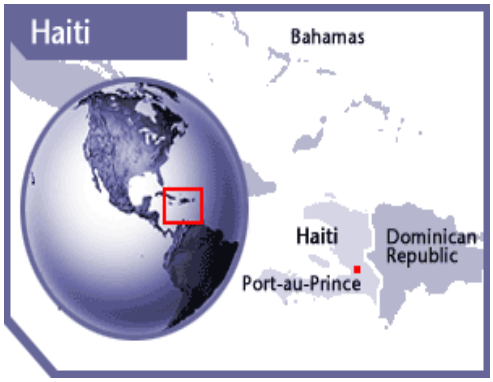
1 Introduction

This study was implemented by The Red Cross (Haitian, Canadian), ACDI/VOCA and Oxfam (GB, Intermon, Quebec). Each organisation is currently involved in either emergency response activities to address basic needs or protect livelihoods. The EMMA pilot test seeks to better understand critical market systems for the population directly and indirectly affected by the cyclone and to enable these organisations to programme more effectively. At the same time we hope to learn from the pilot experiences in order to improve the toolkit itself.

1.1 Context

Haiti is the poorest country in the Western Hemisphere. About 80% of the population lives in abject poverty. Nearly 50% of all Haitians depend on the agricultural sector for employment, of who most are small-scale subsistence farmer (of less than 2 hectares). Unemployment is estimated at 70%, and the informal economy is growing slightly more than the slow progress of the formal economy.



External aid is essential to the future economic development of Haiti. Social and economic indicators show Haiti falling behind other low-income developing countries (particularly in the Hemisphere) since the 1980s. Haiti's economic stagnation is the result of earlier inappropriate policies, political instability, a shortage of good arable land, environmental deterioration, and chronic deforestation, continued use of traditional technologies, under-capitalisation and lack of public investment in human resources, migration of large portions of skilled population, and a weak national savings rate.

1.2 Tropical Storms and Cyclones in Haiti

Since mid-August, Haiti has been struck by three tropical storms. Tropical Storm Fay was the first to hit, on 15 and 16 August, followed by Hurricane Gustav on 26 August. Tropical storms Hanna and Ike brought with them more high winds and rain on 1 and 6 September. The storms struck all 10 of Haiti's regions.

The government of Haiti says 86,000 people are now living in temporary shelters, 25,000 of them in Gonaïves, where much of the city remains under water[1]. Government figures indicate some 10,842 houses have been destroyed, and 35,125 damaged. Livelihoods and crops destroyed, and the entire road system – including seven of the mountainous country's key bridges – has been severely damaged.

The damage caused by the storms and hurricanes will have a long-term effect on the country's food security, having resulted in significant losses of crops and livestock, as well as the destruction of agricultural infrastructure, especially irrigation systems. About 63,000 hectares were flooded, mainly along the rivers and on low-lying plains. According to the National Committee for Food Security (CNSA) 30% of the rice crop was wiped out by the storms and floods in addition to 20% of the banana crop. With maize, beans and wheat, included the number is much higher, leading to a total agricultural loss estimate of 70%.

Hospitals have been flooded and left without electricity. Dirty flood water is spreading disease, and families living in temporary shelters are finding it impossible to get daily essentials like clean water and sanitation. Children are particularly at risk. Many schools have been flooded. Those that weren't are now being used as temporary shelters, so the start of the new academic year has been postponed and children haven't been able to have their lessons.

[1] Four years after the calamity of Hurricane Jeanne, the city of Gonaives was once again under water.

1.3 Haiti and High Food Prices

Before the hurricanes, the situation for households in pilot study areas was already precarious in the wake of the political crisis in April when markets were disrupted and prices rose considerably. A number of humanitarian actions were undertaken to bring prices down to acceptable levels.

In addition to this this global food crisis hit Haiti particularly hard because it imports more than 50% of its food and 80% of its rice. The price of imported rice increased by over 60% from October 2007 to April 2008, while imported wheat flour increased by 73%, and maize by 91%. With the storms' severe and widespread destruction, food prices climbed in most areas, then have almost fallen back to the high, pre-crisis prices.

Haiti's primary crops include rice, beans and manioc (banana); food production covers only 43 percent of the population's needs (imports cover 52 percent and food aid 5 percent).

FEWSNET's[2] Livelihood Zone profiles (September 2005) indicate that the poor in Haiti rely heavily on cash as a source of food, so the increase in price of imported food has hit this group particularly hard.

2 The Assessment: Area, Organisation and Market Systems of Study.

The assessment areas are described in more detail in the individual market systems reports in Sections 4 and 5, briefly, together with the participating organisations, they include:

Area of Study	Organisation
Artibonite - concentration of study on Gonaives	Oxfam and CNSA.
Communes: St. Marc, Desdunes and Grande Saline	Red Cross.
South East: Jacmel, La Vallee, Bainet	ACDI/VOCA and CNSA.

As indicated in the table below, the local assessment teams consisted of experienced humanitarian staff, with skills in assessment surveys or of livelihoods development work. See Annex 1 for a full participant contact list.

Emergency Consultant for ACDI/VOCA, Brian Cavanagh, participated in the fieldwork with the ACDI/VOCA team, and also in the analysis and reporting on the beans market system. Emmet Murphy, Chief of Party for ACDI/VOCA also significantly participated in the analysis and reporting of findings for the Beans Market System.

Pilot 3 Participants in Haiti

#	Name	Position	Organisation
1	Louise Pascale Toyo	Food Security & Livelihoods	Oxfam GB
2	Joseph Faude	Project Officer for Dev. & Enterprise	Oxfam GB
3	Vincent Lamothe	Food Security & Livelihoods	Oxfam Quebec
4	Gerry Delphin	Early Warning	ACDI/VOCA
5	Fenold Clerval	Commodity Manager	ACDI/VOCA
6	Colo Marie Rosemonde	Agricultural Extension Agent, ACDI/VOCA & FEWSNET/CNSA Data Collector	ACDI/VOCAFEWSNET/CNSA[3]
7	Jean-Baptiste Bède	National Coordinator.	Canadian Red Cross

[2] Famine Early Warning System Network – www.fewsnet.org

[3] National institution: Centre National Sécurité Alimentaire.

		Engineer.	
8	Léandre Appolon	Civil Engineer & Disaster Management	Haitian Red Cross
9	Dr Karl Dennerville	Health Economist, HRC Board Member	Haitian Red Cross
10	Delmond Enaelle	Bas Plateau Coordinator, Central	Haitian Red Cross
11	Desir Samuel	Technician	CNSA – Gonaives
12	Marie Denise Samson*	FS & Livelihoods	Oxfam Intermon
13	Luc St. Vil*	FS & Livelihoods	Oxfam GB
14	Anna Zingg*	FACT Recovery	IFRC

*participated in the training but not in the fieldwork or analysis.

Critical Market Systems

Each participating organisation was strongly encouraged to select a critical market system according to their understanding of the current, priority needs based on either their, or other organisations', needs assessments. Participating organisations also have their own particular specialism and mandate, and geographical areas of work, therefore the selection of critical market systems reflected three issues:

1. Priority un-met needs
2. Organisational specialism
3. Geographical area of operational interest

For EMMA to attract NGOs' key staff, the pilot needed to have the potential to produce useful and meaningful information to each organisation for emergency programming purposes, therefore the selection of markets was left for each organisation to decide, with some guidance from Anita. Markets systems selected were as follows:

1. **Beans** (critical for food security and livelihoods).
   Organisations: Oxfam, ACDI/VOCA in the areas of Gonaives and the South East.
2. **Timber (Lumber)** (critical for shelter reconstruction).
   Organisation: Red Cross in the area of Artibonite.

Rationale for Selection of Timber Market System:

Following Red Cross assessments in the three targeted communes, many low income households were found without shelter and waiting for support to reconstruct their homes. The target groups for Red Cross intervention are those households whose homes have been completely destroyed and have no means to reconstruct themselves. The scale of destruction is big enough that no one agency is able to handle the reconstruction alone.

Specifically, teams decided to use EMMA to try to answer the following questions:

- What is the market capacity to supply Timber (for reconstruction) to the affected population?
- Can cash be used or direct purchase?

Rationale for Selection of Beans Market System:

The main reason the bean market system was selected for study is because it is considered an essential component of the Haitian diet and a good indicator of the overall functioning of the food market in the

country. With imported food aid being delivered to the most affected households, there were also questions as to how long this should continue. In terms of livelihoods, there were questions as to how the hurricanes had affected farmers and traders. Also, as little is known about how food moves along supply chain pre-crisis[4], it was thought to be of importance to organisations interested in studying food security.

Specifically, teams decided to use EMMA to try to answer the following questions:

- How the crisis has affected farmers' access to beans markets (to sell produce)?
- What is the availability of beans supplies (for purchase/consumption)?
- How has the crisis affected beans market chain actors? And how are they coping?
- When should food aid be stopped, and how?

3 Methodology

The details of how the pilot test for EMMA was conducted, including training, pilot organisation and evaluation are written up in the separate Pilot Report. This will be available on the EMMA website www.dgroups.org/groups/RMAT)

More detailed methodology can be found in each Market System report (below), however, broadly:

The assessment teams' methodology included the following stages:

1. Internal review of needs assessments to determine priority market systems for selection. Followed by discuss with EMMA Pilot Consultant on rationale for selection.
2. 4 days of EMMA training. Which included drafting market maps, seasonal calendars, interview questionnaires and data tables. The 4th day was dedicated to testing questionnaires with Port au Prince traders, any final questions or adjustments to questionnaires and preparation for field visits.
3. Reading key documents available (initial assessments, previous evaluations, etc.)
4. Field visits to the South East and Artibonite. The field visits included discussing with local field staff, NGOs, local government, focus group discussions with key informants, trader and household interviews.
5. 3 days of data collation, analysis and reporting. This included a presentation of findings to the wider humanitarian community and a national institution (CNSA)[5].

[4] Plenty of price data exits in Haiti but the analysis of the structure, performance and conduct of food market systems is weak.

[5] Organisations represented included ACDI/VOCA, Oxfam GB-Quebec-Intermon, IFRC, Christian Aid, Canadian Red Cross, Haitian Red Cross, WFP, CNSA, ACTED, Concern Worldwide, FEWSNET, German Action Agro, IOM, OFDA, Plan International, Samaritans Purse, Save the Children, USAID.

EMMA Timeline

29 Sept – 2 Oct	3 – 10 Oct	11-15 Oct				
Training & Assessment – 3 days: training; draft market mapping / seasonal calendar; secondary data collection & questionnaire / data tables design – 1 day: Port au Prince trader interviews & initial reflections	**Assessment Period*** – Oxfam: 7 days – ACDI/VOCA: 5 days – Red Cross: 4 days	**Data Collat-ion**	**1 Day off**	**Data Analysis**	**Reports & EMMA Evaluat-ion**	**Present-ation of Findings**
4 days	4-7 days	3.5 days				

* Staff and logistics constraints meant that some teams were unable to spend a full week in the field.

4 The Market System for Timber (Lumber)

Area of Assessment and Proposed Intervention

The Red Cross area of intervention covers the region of Bas-Artibonite, in particular the communes of St.Marc, Desdunes and Grande Saline. The main economic activity in the region is rice production and small-scale fishing.

Saint-Marc

St.Marc borders Marchand Dessalines to the north, the Western Section to the south, to the west is the sea, and to the east is the area called Petite Rivière de l'Artibonite. The area is 545km.sq, with a population of more than 300,000 persons, living in 6 'sections communales' (it's the biggest 'commune' in the region). Agriculture is the main livelihood activity, with rice, vegetables (tomatoes, cabbage, carrot, etc.), banana and sugar cane in some areas. Farming of coffee and cocoa is on the decline. Tourism also brings a small amount of revenue.

Commune de Desdunes

Bordered by the sea to the West, St.Marc to the south, to the north an area called l'Estère and the East by Marchand Dessalines, the area of Desdunes is situated 45 kilomètres from the main northern highway. The population is more than 40,000 people and 99 km.sq. Agriculture and fishing are the main livelihood activities in the area. The level of education is relatively low; there are very few schools, except a Christian missionary that teach up to primary level. Only three medical centres exist with poorly qualified staff.

In Desunes there is no prepared timber market, the households of average income buy their timber in St.Marc. The poorer households use the forest wood to construct their homes and also buy in l'Estère. This area has been hit hard by the recent cyclones. The smaller houses, are generally built with wood from the forest and mud or a mixture of straw, and the roofs, also of poor quality material have easy been destroyed. Plantations have been destroyed and about four people killed. The economy, already very fragile, is further weakened.

Commune de Grande Saline

Grande Saline is a small, coastal city, crossed by a river, and today the population is about 20,000, mostly women. In Saliniens, the market system for timber doesn't exist. People use the forest wood to construct their houses. Those with middle income buy timber from St. Marc. The main economic activities here are salt mining, then fishing.

Before the crisis the area had road access, but now the only access is by sea. The cyclones have gravely damaged the road and the salt mines; valuable sources of income for the population.

Impact of the Cyclones on the Region

The last storms of Gustav, Fay, Hanna and Ike have caused huge amounts of loss and damage. Tens of thousands of plantations have been completely destroyed, and more than 75% of homes destroyed, thousands of animals have been carried away by the floods, more than a dozen people have been killed and the bridges and roads have sunk. The Haïtian Red Cross, supported by the wider Red Cross Movement have been responding to urgent needs of the affected population: evacuation of the population, distribution of kits, and assistance to the wounded.

Following our assessments in the three targeted communes, we have found that many people are without shelter and waiting for support to reconstruct their homes. Therefore the target groups for Red Cross intervention are those households whose homes have been completely destroyed and have no means to reconstruct themselves.

4.1 Methodology

This assessment was conducted by four Red Cross (RC) members in Bas Artibonite :

- Bède JEAN-BAPTISTE, Project Coordinator (Community Health project), Engineer, Canadian RC.
- Enaëlle DELMONT, student of Administration Science, Coordinator of RC branch, Belladère.
- Dr. Karl Jacques DENERVILLE, Head of Preventative Health Service, Board Member Haïtian RC.
- Léandre APPOLON, Engineer, Emergency Co-ordinator Hatian RC.

To collect information the team interviewed key informants: Mayors, Director Customs in Saint-Marc, Regional Office of the Red Cross and the different officials of the communes. Affected wholesalers, traders and households were also interviewed using pre-prepared questionnaires.

4.2 Introduction to the Market System for Timber (Lumber)

At the beginning of the 16th century, Haiti was mostly covered with green forests of great ecological variation. Today, forests have been reduced to only 2-4% of the land, according to figures from the USAID. The single largest forest left in Haiti, the Foret des Pins, covers only 26,400 hectares of land and is being reduced by the day. The loss of trees has caused the destruction of 21 watersheds for the country. Floods and droughts are the result, and the recent cyclones have highlighted just how much worse the impact is on a country with so few trees to protect it. Competing against a demand that has far exceeded supply, Haiti loses more than 30 million trees a year to provide wood, fuel and crop land to a desperate population.

Haiti is dependent on wood; charcoal is used for 76% of Haiti's energy needs. Experts say that bakeries, rum distilleries, and housewives use the charcoal equivalent of 27 acres of wood each day.

There is little optimism when it comes to saving Haiti's forests: there are no illusions amongst experts that Haiti will ever be restored to the rich forest cover of the 18th century before the French brought a million African slaves to clear the forests for sugar and coffee (followed by a procession of lumber companies in the 19th century that paid large sums to landowners and corrupt government officials for access to the forests).

Unfortunately, poor families are forced by poverty to illegally cut the lower quality forest timber. Imported timber is not used, in any way, by the targeted households in the communes concerning this study because it's simply too expensive for low income families to afford. However, targeted households have expressed the need to use the imported timber for construct their homes instead of the forest timber because it's of better quality and clearly contributes towards risk reduction in the event of future severe weather conditions.

It is for these reasons, the quality issue and concern over further environmental degradation, that the Red Cross chose to study the market system for imported timber from countries that have sustainable resource management.

4.3 Seasonal Calendar for the Timber Market System

The seasons do not have much impact on the availability of timber (purchases and sales) as supplies are consistently available for import all year around. Only currency exchange rates with the US$ have any real impact upon this system and this is not so seasonally dependent.

Demand increases slightly in the period preceding the return to school, and during the Christmas season (the season of marriage when demand for furniture and building is high), but does not have a significant impact upon prices. See the Seasonal Calendar below.

In terms of seasonal livelihood activities in the different communes of Saint-Marc, notably the 2nd section Bois Neuf, 3rd section Goyavier, 5th section Bocozelle, and the commune of Desdunes which is the most affected by the cyclones, the major harvesting of rice is in the months December and July.

Seasonal Calendar: Timber Market System

Activities	Jan-09	Feb. 09	Mar. 09	Apr-09	May-09	Jun-09	Jul-09	Aug-09	Sept. 09	Oct. 08	Nov. 08	Dec. 08
Weather												
Price of PW	$↑						$↑	$↑		$↓ LOW	$↓ LOW	$↑
Period of construction/ & repair												
Harvest of Rice												
Available of Skilled Labour												
Red Cross Planning	Contracts / land verification	Delivery of materials, Construction, project monitoring						Project Evaluation			Beneficiary Selection	

4.4 Timber Market System and Gender

Men and women both trade in this market system. Women are likely to support their trader husbands, mostly at the level of regional distribution (wholesalers). Men tend to own the businesses in this system, from the retailers up to the importers.

4.5 Potential Demand induced by the Red Cross Project

The table below shows the estimated number of households who need assistance because their houses have been completely destroyed. As they have no means to purchase timber themselves, the table indicates the demand created by the Red Cross project.

Most affected households expressed a preference to receive the timber directly from the Red Cross (in-kind) instead of in cash or voucher. As the reconstruction of their homes is an extremely high priority, many feared that the cash would be used to meet their numerous other needs and they would not be

able to manage the money themselves. The perception of high risk of corruption by traders also played a role in families' preference to receive in-kind. In addition to this, the purchase of timber is not familiar to most poor households, and the distances to travel are long. Families have probably also calculated the costs of transportation and figured that it would be wiser to ask the Red Cross to deliver.

The Red Cross can consider a voucher-system in place of in-kind distribution, which would need to be supported with trader transportation of timber directly to their households but this would need to be carefully discussed with affected communities and monitored to minimise risk of corruption.

The Red Cross propose to purchase timber on behalf of their target beneficiaries and organise delivery to the agreed construction sites. In addition to timber, other materials will be purchased for households, such as cement, CGI sheeting[6], etc.

Potential Demand for Prepared Timber

COMMUNES	No. Of HHs Totally Destroyed	TIMBER		CEMENT 60 bags / HH	CGI SHEETING 33 sheets/HH	ROCKS 3 Loads/ HH
		(2 x 4 x 14) 14 pc / HH	(1 x 4 x 14) 18 pc / HH			
Saint-Marc						
2ème section Bois Neuf	310	4,340	5,580	18,600	10,230	930
3ème section Goyavier	235	3,290	4,230	14,100	7,755	705
5ème section Bocozelle	400	5,600	7,200	24,000	13,200	1,200
Desdunes	1,644	23,016	29,593	98,640	54,252	4,932
Grande Saline	12	168	216	720	396	36
Total	**2,601**	**36,414**	**46,819**	**156,060**	**85,833**	**7,803**

Households also confirmed that their communities would provide the necessary labour for reconstruction.

4.6 The Market System for timber Before the Crisis:

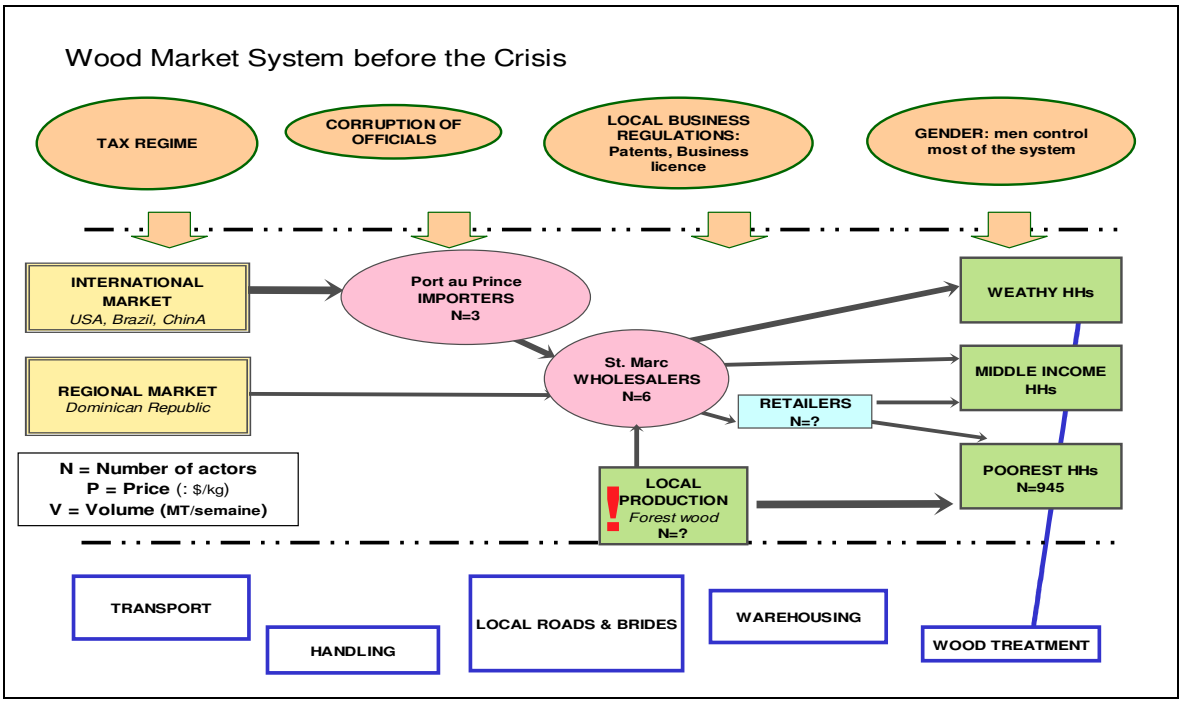
Haïti's forests are constantly under threat to disappear because of the illegal cutting of wood for construction and for charcoal. To protect this natural resource, the Haïtian government encourages the importation of the timber from countries who have vast forests of timber under sustainably management projects.

timber in Haïti is 100% imported and can be described as follows: the main regulator of the market is the ADD who follow the rules established by the AGD and the other Institutions like the DGI, the MCI and the MARNDR.

At the level of importation one must have certain documents: certificates of quality, bill of quantity, cargo manifest, etc. The importers sell onto the wholesalers, who supply directly to the market in the capital; these importers also buy from the Dominican Republic.

The timber is sold directly to the households by the local distributers. The transportation of the timber is at the cost of the consumers. The prices and the quantities vary depending on the exchange rate of the Gourde with the international currencies, and the price of oil. However, prices of timber have not changed much over the last few years, indicating a highly steady market.

[6] These other materials are available in sufficient quantities in St.Marc.

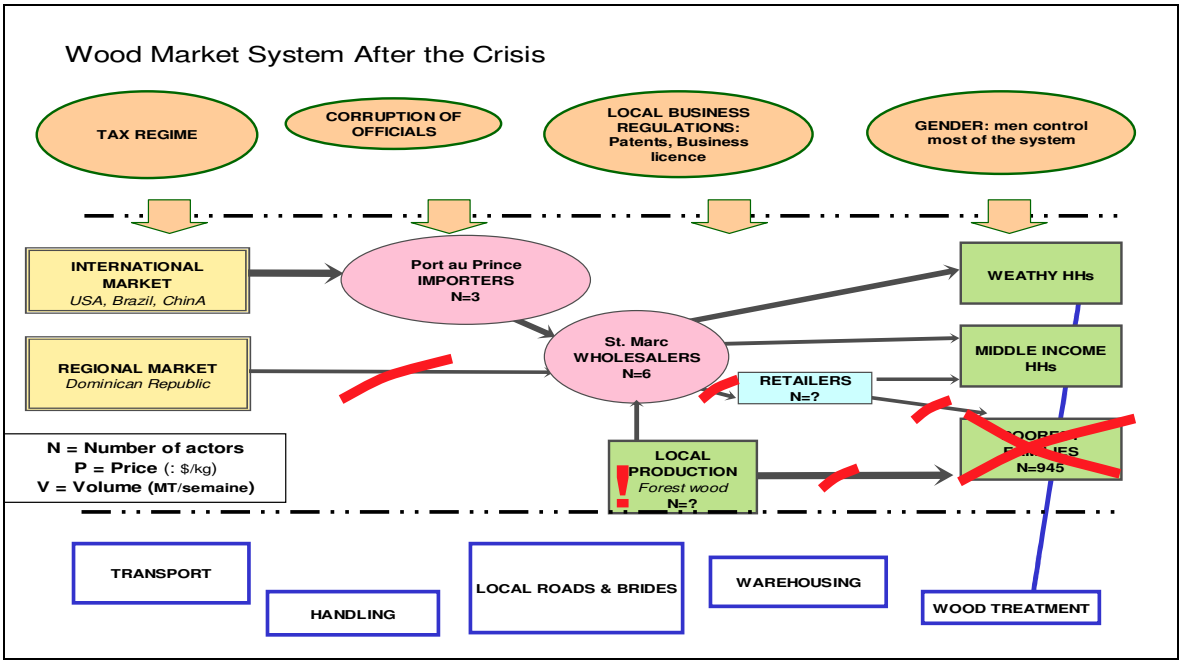


Note that the competition is weak at the level of wholesalers in Saint-Marc, where distributers and consumers buy directly from the wholesalers who come together to fix prices between them. This weakness is explained by the fact that there are only six wholesalers who often buy from the same importer; this same importer also provides the transportation from Port au Prince to Saint- Marc.

To conclude, competition is limited but prices are relatively stable; the only element of competition is that some traders and importers guarantee free transportation and handling.

4.7 Market System After The Crisis

The cyclones have not significantly impacted upon this market system, excepting transportation which was mostly affected in the first few weeks, and the impact on households. The main source of supply, Port au Prince imports, was not directly affected at cyclones, and only indirectly affected when the market suffered a slight, initial drop in demand; this will likely significantly rise later when reconstruction begins.



Further, a deviation on the main national highway #1 has been created to avoid the damage caused the destruction of the bridge at Montrouis which provides access to the Western Department of Bas-Artibonite.

To understand the relation between volume/price we can refer to the price index for before and after the crisis. These details are regularly calculated by the IHSI and are available on the website: www.ihsi@ihsi.ht

The most interesting aspect of study for this market system is the high level of price stability. Even after the crises, the price of timber did not change at all. Therefore, the table below shows the prices and quantities traded before and after the cyclone.

Volume and Price of Timber Before and After the '08 Cyclones (data collected October 2008)

Location and Actors	Quantity / Week		Price	
	2 x 4 x 14	1 x 4 x 14	2 x 4 x 14	1 x 4x 14
Importers (3) Port-au-Prince	75,000 (1000 packs of 75pcs/wk)	400,000 (2000 packs of 200pcs/wk)	38,250 Gourdes/ pack	45,000 Gourdes/ pack
Wholesalers (6) Saint-Marc	1,800 (150 dozen)	2,400 (200 dozen)	450 Gourdes/piece	242 Gourdes/piece

Finally, market system actors believe that supply of timber to affected areas is entirely possible, and request advance payment with two weeks advance notification to respond to demand provoked by the project. However, knowing that timber imports can take up to one month to arrive, it's best to plan for a one month period of notification.

4.8 Capacity of the Market System to Respond to the Demand

This market system has the capacity to respond to the demand at every level of the chain (with one month notification) because the supply chain is normally stable and is currently functioning well in both the non-affected and affected areas. This was explained by the wholesalers of Saint-Marc who also buy from the Dominican Republic.

Further, the capacity of this market system to respond to the Red Cross-induced demand seems highly likely considering traders currently import more than double the whole target populations' needs in just one week (75,000pcs of 2x4, and 404,000pcs of 1x4). Please see the table below for details on the capacity of the system as compared to the needs of the population.

Weak competition at the level of Saint-Marc should be handled with care, with all details carefully discussed and agreed formally on binding contracts. However it's likely that that good reputation of the Red Cross in the region will support a fair trade agreement.

Needs and Anticipated Market Response

Location & Key Issues affecting the Availability & Market Access	Target Pop.	Current Availability on Local Market Timber (pc / wk)		Total Priority Needs Timber (pc / wk)		Projected variation Timber (pc /wk)		Anticipated Market Response Timber (pc / wk)	
		2x4x14	1x4x14	2x4x14	1x4x14	2x4x14	1x4x14	2x4x14	1x4x14
Saint-Marc No demand after the crisis	945	150dz x 72 **10,800**	200dz x 72 **14,400**	14u x945 **13,230**	18u x 945 **17,010**	2,430	2,610	150dz x72 **7,200**	200dz x6 **10,800**
Desdunes Supplies will be accessed from St-Marc.	1,644	0	0	(14u x 1,644) **23,016**	(18u x 1,644) **29,593**	23,016	29,593	***23,016**	**29,593***
Grande Saline Supplies from St-Marc**	12	0	0	(14u x 12) **168**	(18u x 12) **216**	168	216	**168***	**216***
Total	**2,601**	**10,800**	**14,400**	**36,414**	**46,819**	**20,754**	**27,199**	**30,384**	**40,609**

* Timber Desdunes and Grande Saline can be supplied by Saint Marc traders.
** The blocked road could exclude this commune

4.9 Conclusions

To summarise with reference to the original EMMA Key Questions:

What is the market capacity to supply Timber (for reconstruction) to the affected population?

The imported timber market system is generally stable and following the cyclones, has hardly been affected at all. All indications point towards a system very capable of supplying the targeted population with the timber they need. Humanitarian interventions should try, where possible, to source timber from the nearest available supplier in order to inject cash into the local economy and affected area (i.e. local transportation and labour for handling will be used).

Can cash be used or direct purchase?

Households expressed the preference for 'direct purchase' or in-kind due to their concerns regarding corruption of traders and ability to access timber. However, cash, or rather vouchers, can still be considered but would require further discussion with communities and careful monitoring during implementation. Unfortunately, during the process of field testing EMMA, the Red Cross was not able to fully explore the voucher option.

In terms of house construction, currently the only choice for poorer households is to cut trees themselves. Such degradation is caused by the very low standard of living in these regions. Unfortunately, trees are in such scarce quantity that even this is nearly impossible. We recommend, as an emergency intervention, to reconstruct houses for the poor, not only in consideration of their current, urgent needs, but also to avoid further degradation of our precious natural resources and to reduce the future risks for these vulnerable households: a wise response to this crisis would be to build back better, using imported, strong timber (and other stronger building materials), as the supply chain is functioning well.

Further, the Red Cross has completed some basic study of the seasonal calendar of households in the area and planned the reconstruction period so as not to coincide with agricultural activities. See Seasonal Calendar in Annex 2, which also details a tentative Red Cross programming timetable.

There are many complex issues to consider when embarking upon reconstruction following such a crisis and the Red Cross are aware that this study is but one small part of a larger assessment that must take place. For instance, the availability of all the other shelter materials must be considered; the willingness of communities to participate freely in reconstruction must be verified; that local labour is skilled enough to guarantee minimum standards in construction; land tenure agreements must be secured or at least the government must agree to the location of reconstruction; in terms of risk reduction, the Red Cross needs to ensure that homes are not built on insecure sites and that will take time and expertise.

4.10 Recommendations and Follow-up

- The Red Cross concluded that they should directly purchase timber from regional traders for delivery to beneficiary sites. However, the Red Cross can still investigate a voucher-system in place of in-kind distribution, which would need to be supported with trader transportation of timber directly to their households but this would need to be carefully discussed with affected communities and monitored to minimise risk of corruption.
- The Red Cross consults with Shelter Cluster and government in the whole planning process
- Repeat EMMA for other shelter materials
- Discuss shelter dimension and material with the Shelter Cluster and check the minimum standards required for shelter construction
- Verify if community labour will really be freely available, in sufficient quantity.
- Verify if community labour is skilled enough to meet minimum standards
- Ensure that vulnerable families (female-headed HHs, disabled, sick and elderly)are able to find the labour for reconstruction and are not excluded from selection.
- Cross check with key informants and the humanitarian community that no planned projects or seasonal activities will interfere with the timetable for reconstruction, i.e. households will not be occupied with other activities and labour will be available.
- Discuss issues of land tenure and site selection with Shelter Cluster and central / local government.
- Discuss site selection and risk reduction with experts
- Ensure community participation in the planning, implementation and evaluation of the project. For instance, take special care that the community is consulted in beneficiary and site selection to avoid conflict or suspicion over choice of beneficiary and site.

5 The Market System for Beans (Haricots)

The main reason the bean market system was selected for study is because it is considered an essential component of the Haitian diet and a good indicator of the overall functioning of the food market in the country. With imported food aid being delivered to the most affected households, there were also questions as to how long this should continue. Also, in terms of livelihoods, there were questions as to how the hurricanes had affected farmers and traders.

The purpose of this assessment was therefore to assess the impact of recent storms on the market system in order to design adapted responses. Specifically, Oxfam and ACDI/VOCA wanted to answer the following questions:

- How the crisis has affected farmers' access to beans markets (to sell produce)?
- What is the availability of beans supplies (for purchase/consumption)?
- How has the crisis affected beans market chain actors? And how are they coping?
- When should food aid be stopped, and how?

5.1 ACDI/VOCA and Pre-Cyclone Food Security Programmes.

Prior to the hurricanes, ACDI/VOCA had been working on a programme to introduce improved bean seeds as part of its regular USAID Title II-funded MYAP in Haiti. Therefore, subsequent to the hurricanes, their recovery efforts in the Southeast of Haiti (including participating in EMMA) took this work into account. As such, some of the EMMA findings relating to bean seeds are based on the following facts and pre-cyclone conclusions:

- From July this, year, part of ACDI/VOCA's regular food security program was to introduce 80 validation plots of a new black bean seed variety selected by the bean program of the MARNDR (Haitian Ministry of Agriculture); 20% of these plots that survived the hurricanes had far higher yields than the local varieties and immune from the mustia fungus plaguing the area (La Vallée de Jacmel and Bainet). For the few bean plots that survived, farmers are clamouring for this seed. ACDI/VOCA is now multiplying the seeds that survived and will use this stock for future multiplication and demonstration plots with this improved variety.
- In Haiti farmers generally use grain as seed. The few institutions involved in real seed production produce negligible quantities in comparison to the demand. Secondly some institutions have trained some farmers in artisanal bean seed production, even in this case certified seed is needed to restart the process.
- Following the cyclones, up to 90% of the bean crop, hence seed, was wiped out for the season. Bean seed is so scarce in Haiti that the Government / FAO are seeking foreign sources of adapted varieties to supply local farmers given the critical shortage in the country (i.e. In the South-East, no rural agro-input supply shops exist).

5.2 Methodology

Two teams of three persons undertook the assessment of the bean market system; ACDI/VOCA team focused on the western communes in South East Department while Oxfam concentrated on Gonaives and the surrounding area. The principal methods for collecting information were as follows:

- Primary data collected from CNSA
- Field survey in Gonaives, Verettes, Estere (in Artibonite) Bainet, La Vallee (in South East)
- Visits to wholesalers and retailers in all areas
- Visits to Mayors' Offices, CASEC, ASEC, Departmental Emergency Committees, Departmental Agriculture Offices.
- Household interviews with the affected population

5.3 Introduction to the Beans Market System

In Haiti, both locally produced and imported beans are traded and consumed. Generally, Haitians prefer beans produced from their region. Even though the prices of imported beans can be up to half the price of locally produced beans, families tend to consume less of their preferred, local choice, rather than purchase the cheaper, but less favoured imported beans. Of course, when local stocks are low and prices high, imported beans are consumed in higher quantities.

For self-consumptions, households in La Vallee/Bainet go to market 1-2 times/week and in Gonaives 3-5 times/week.

There are too many different varieties of beans to name here, but briefly the better known are:

- Locally produced beans: Congo, Desouche, Noir, Blanc, Rouge, Beurre.
- Imported beans: Pois Beurre, Pineto and Pois blanc. The majority of imported beans are from the U.S. and Dominican Republic (DR), with Haitian's generally preferring DR beans to U.S. varieties.

5.4 Seasonality of the Bean Market System

The urban and rural markets studied showed seasonal price fluctuations as a function of supply and demand (*see Annex 2 for seasonal calendar):*

Production can be affected if sufficient farm labour is not secured during the high cultivation periods, especially Feb-May.

- Prices tend to rise in the planting seasons when stocks reduce (March-April)
- Prices tend to drop following harvests (June-July, Dec-Jan). The production zones for Gonaives are the mountainous areas of Marmelade, Ennery, Cahos
- Prices tend to rise during holiday periods when demand is high.
- In the Gonaives area during the November-February period varieties like locally grown *Pois Congo* or P*ois de Souche* are widely available in the markets. This causes a drop in demand for imported varieties (Noir, Pinto, Blanc).
- The prices of bean varieties grown in the lowland plains do not vary very much because of the low volume of production.

5.5 Gender and the Bean Market System

Specialised gender roles were observed in the bean market system: men dominated in the transport and handling of beans (and other agricultural produce) while women exercised the primary responsibility in distribution, buying and selling.

Bean production is mainly carried out by men who own the land and women are involved in activities such as planting, weeding and harvesting. However, once the bean product is sold in local markets (cash crop), close to production areas, the profit is managed mainly by men, even if it is the women who trade at market. The main buyers of beans in local markets are "Saras" linking producers to consumers in cities.

The "Madame Saras" (women traders) are key intermediaries in the market system. They buy in quantity from the growers at harvest time, transporting the commodity to urban markets, especially Port-au-Prince. When demand rises, they ensure that the supply chain is reversed. Madame Saras face many difficulties and risks: poor roads, several days travel outside their home, risk of truck accident and loss of produce during the voyage, insecurity on the roads, aggressiveness of drivers, insecurity in cities (theft, loss of money, murder, ect.).

Finally, there is conflicting opinions amongst team members about how resources are shared within the household; some team members believe women have to cover most of the needs of the household, especially those of the children, and others believe the responsibility is shared equally. Further analysis is needed.

5.6 Demand

The households interviewed and targeted by Oxfam and ACDI/VOCA are those who have been severely affected by the cyclones; people whose houses have been completely destroyed, or who have lost their entire livelihood (i.e. farmers whose crops have been totally destroyed).

Household interviews indicate that families are coping with the crisis by reducing their consumption of beans by an average of 50%. Accordingly, traders in all areas of study talked of a severe drop in demand for beans due to affected households' lack of cash. In the South-East the drop in demand is more than 50% and explained by the fact that this is a bean crop producing area and with most of the stocks wiped out, families neither have the crop for consumption, nor the cash (from crop sales) to buy more.

The table below indicates a rough estimate of the current demand for beans for the local population, i.e. quantities currently being purchased. The 'Potential Demand', is the desired daily consumption rate (needs), and the quantity that the target population would access from the market if they had access to cash.

Currently, markets and food aid are meeting the (reduced) local demand, especially in Artibonite and Gonaives. The market study put the demand for beans local beans in the markets at 16MT per month in Gonaives and 5-7MT per month in Bainet/La Vallee.

The estimates of potential monthly demand for the two study areas were approximately 20MT for Gonaives and 30MT for Bainet/La Vallee. These figures are for project target families only.

For ACDI/VOCA this includes 3,000 households in Bainet/La Vallee. It does not take into account household stocks which in rural areas constitutes the primary source of consumption. For example, in La Vallee/Bainet, it is estimated that roughly 30% of production is preserved for domestic use.

Target Population Needs

LOCATION	NUMBER OF TARGETED HHs	TARGET POPULATION POTENTIAL DEMAND (MT / month)[7]	ENTIRE LOCAL POPULATION CURRENT DEMAND
ARTIBONITE TOTAL	**2000**	**20**	**16**
Bainet	1860	18.6	
La Vallee	1140	11.4	
SOUTH-EAST TOTAL	**3000**	**30.0**	**5-7**

Considering the total population of the two communes of 105,000, that would equate to a typical monthly demand of 229 MT/month.

Lastly, in household interviews (both Artibonite and the South-East), when asked for immediate solutions to their current bean (food) shortage people expressed a preference for:

1. Cash. Indicating that most of the food and non-food items they need are locally available.
2. A mix of cash and food as the second preference.

[7] EMMA focus group discussions in La Vallee/Bainet revealed that the average family of 5 consumes 10.8 kg of beans per month and in the Gonaives area the figure was even higher. For the purposes of our calculations, Potential Demand (target group needs) per month are based on WFP rations: average amount required is 10kg of pulses / month / household of 5 persons.

5.7 Bean Market System before the Cyclones

This map synthesizes at three levels:

1. The institutional environment that influences the actors in the bean market system, e.g. the tax and customs environment, the seasonal calendar
2. The relationships between the principal actors in the supply chain: importers, wholesalers, local and regional retailers, growers and household consumers who are often the same as the growers especially in rural areas.
3. The impact of key infrastructure and services on the system, e.g. storage, transport and formal and informal credit.

The team discovered that the pre-hurricane market chain for beans is segmented on various levels, import vs. domestic and regionally:

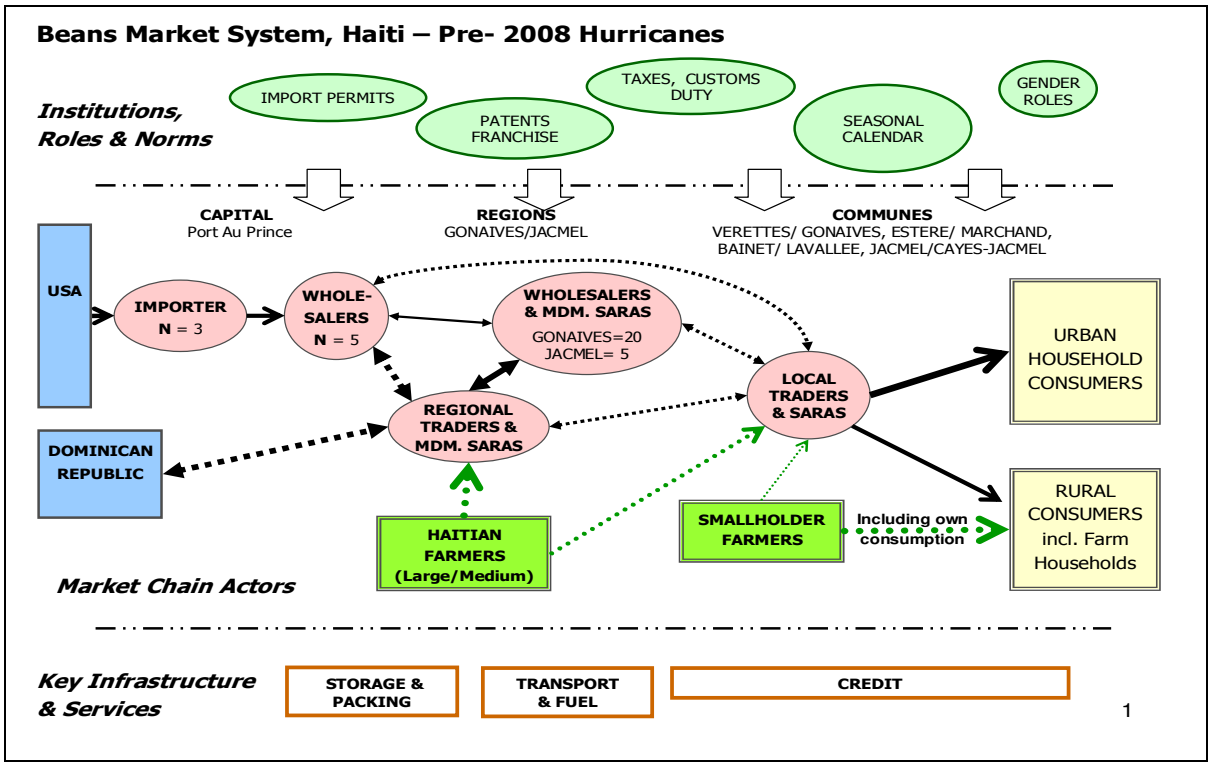
Imports from DR and the US

Informal trade in beans between the Dominican Republic (DR) and Haiti is strong. Unconfirmed information indicates that several Madame Saras monopolise this trade route. Whether true or not, it's clear that Haitian and DR market chain actors are able to switch the direction of flow depending on the availability and demand in each country, i.e. DR supplies Haiti in periods when availability of beans is low, and vice versa (though the flows are generally stronger from DR to Haiti). Many traders indicated that accessing supplies from DR is relatively straightforward and the beans from DR are preferred to the U.S. varieties.

Artibonite imports can be accessed from Cape Haitian, Port-au-Prince and other localities of this department. Madame Saras and wholesalers are flexible in switching from imported to local trade.

Port Au Prince

The primary terminal market in Haiti is Port au Prince which relies upon sources within Haiti, Dominican Republic and the US. For imported beans, three major importers control this trade. A variety of wholesalers move this product in the capital and larger towns throughout Haiti (e.g. Jacmel, Gonaives, Cap Haitien, Les Cayes, etc.).



For domestic production, the survey team was surprised to find the degree of regional segmentation of the domestic bean market within Port au Prince. For example, each region of the country has a specific section of the market dedicated to all products from only this region. As such, beans from La Vallee in the Southeast are sold only in one area and not combined with beans from other regions, for example. This separation is strictly maintained for all traded commodities. Additionally, market entry for new players is practically impossible, as well as regional crossover, which could potentially be life-threatening for the offending party.

The Regions

In terms of regional segmentation, beans from Bainet in the Southeast, for example, are sold directly to Port au Prince rather than the regional capital, Jacmel, which is significantly closer to this commune. For example, in Bainet, the bean market is composed of 80% local supply and 20% imported beans via Port au Prince. Beans producers probably prefer to sell their beans in Port au Prince because they can get higher prices than in the local markets where there is less demand due to high rates of local production (for consumption as well as cash).

Jacmel, the regional capital, would have a higher proportion of imported beans in the market which are sold by handful of large wholesalers with connections in Port au Prince.

In Artbonite, beans are produced in the surrounding area (Marmelade, Hennry, Decaho) and sold on to Gonaives and Port-au-Prince.

Wholesalers

Wholesalers trade in both domestic and imported produce. In Artibonite, the wholesalers control all the moment in the bean market. They know when to buy more imported or domestic produce, i.e. when local beans are available, the wholesalers buy less imported beans and vice versa, therefore are key players in stabilising the supplies and prices of bean. At least at the Gonaives-level, the competition between wholesalers is strong, as traders buy from a range of different sources nationally and regionally.

Retailers and Small Street Traders

These market chain actors are highly competitive, even within segmented Port au Prince; it was difficult for teams to quantify the number of retailers and small street traders at the capital/village/regional levels as there were so many, up to 200 petty traders in some villages/towns.

Producers and Households

Before the hurricanes, the situation of households in the areas of the pilot study was already precarious in the wake of the political crisis in April when the markets were disrupted and prices rose considerably. A number of humanitarian actions were undertaken to bring prices down to acceptable levels. As far as demand is concerned, a certain adaptation of the bean market took place. The harvest in May was abundant and availability of beans on the market was apparent. The farmers generally were preparing to increase their production even more by cultivating more plots than usual. Agricultural recovery programs distributed large quantities of seed to farmers in many areas.

The South-East

The supply of beans from La Vallee/Bainet is significant. Focus group discussions revealed that roughly 80 trucks/month are loaded with beans for the Port au Prince market, roughly 747MT. This number also roughly corresponds to information provided by a local agronomist, Mr. Scott Ricot, namely that 1,000ha are planted with beans, and the area's micro-climate and slopes are ideal for bean cultivation.

Artibonite

In Artibonite, especially in Marmelade, Hennry and the mountainous zones of Marchand, Verrette, beans are cultivated twice a year.

Competition and Integration

It's unclear how competitive the three major importers are in Port au Prince, though qualitative information indicates that competition is not strong at the import level country-wide. That said it seems there is some room for manoeuvre in bargaining. In Artibonite there are several choices of importation hubs (Cape Haitian, Port-au-Prince and other localities of this department) and South-East imports largely come from DR or Port au Prince, though in much smaller quantities than Artibonite because it's a production zone. Generally, the smaller the trader, the more competitive the trade.

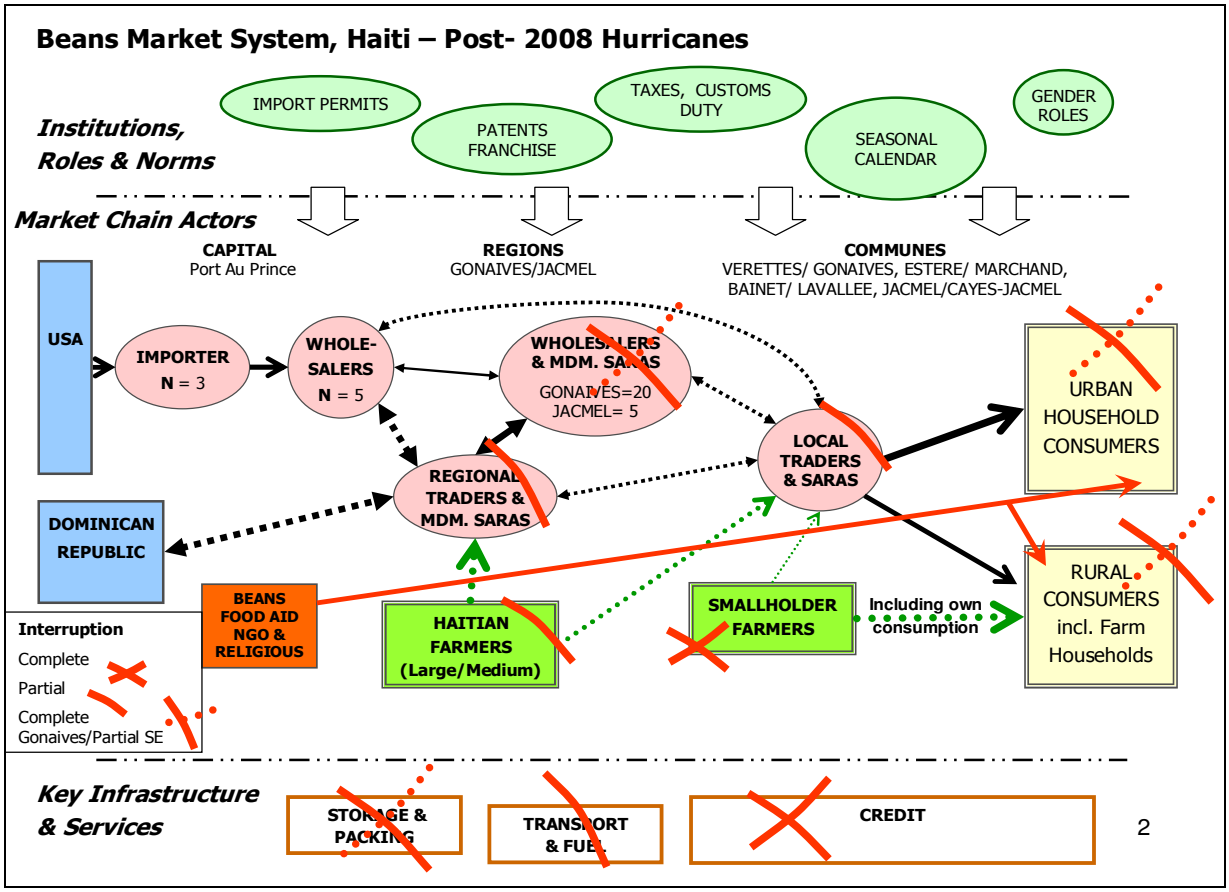
In terms of integration, this is a market that is used to switching quickly in between domestic and imported trade, and the links between market chain actors appear to be strong.

Although market information has long been weak in Haiti, this trend was changing as the competitive mobile phone companies make communication cheaper by the day.

5.8 Bean Market System After The Cyclones

Broadly, the prices in the South East spiked after Hurricane Gustav which hit in late August, then decreased by mid September. Note that Gustav hit the Southeast in late August, two weeks later Hannah flooded Gonaives, and one week later Ike flooded Cabaret and other areas. As such, the impacts were felt in different areas and at various times, so the trends will be different for Gonaives which was untouched by the first hurricane (Gustav).

The hurricane season being more destructive than usual with four storms, bean crop losses reached 90% (in Bainet/La Vallee, for example) which wreaked havoc on the local economy and on the food diet of the inhabitants of these areas.



Market Chain Actors

The relationships between the principal actors in the market system were affected:

Importers - Food Aid

Although importers were not affected directly, the general slowdown in the economy has impacted them negatively. The arrival of a considerable quantity of food aid seems to have reduced dramatically normal market activity and assessment teams heard reports that wholesalers and importers were cautious about buying in bulk as they'd experienced a drop in demand following large food aid distributions; at the same time, food aid is addressing an urgent need as households do not have cash to buy food.

According to market chain actors, there are no problems in accessing imported beans so they would like to see an end to food aid and the increase in national and local demand for beans (with NGO support). There does appear to be a capacity within the bean market to respond, for instance in the Southeast they receive beans by boat from DR, roughly 97 MT/month which end up in Jacmel, Port au Prince and some rural areas, including La Vallee/Bainet.

Wholesalers

Wholesalers are among the most affected especially in Gonaives where their stocks were wiped out and the least able to cope with the affects of the recent crises (as compared to the retailers – see below. The post-crises economic slowdown (drop in demand) has also had a negative effect on wholesalers in the unaffected areas.

Further, in Gonaives, the collapse of the wholesalers has led the infamous Madame Saras to step in and take an more prominent role in supplying beans to the retailers. It's said that Madame Saras are travelling far, to producers and importers, to source beans for the Gonaives market following the collapse of the local wholesalers.

Local and Regional Retailers

Local and regional retailers were only partially affected due to their ability to move and preserve their small amounts of stock: they had less to lose, are highly mobile and therefore adapted quicker than the wholesalers. In Gonaives, traders and sellers have been forced to travel further to find commodities in surrounding districts (Estere, Marmelade, Ennery, etc.); nevertheless, this ability to adapt has meant that they've coped better with losses than wholesalers. Sellers also find themselves in competition with food aid which is reflected in a lesser number of buyers in the local markets.

That said, many retailers will also struggle to recover, especially the many who owe money to credit institutions.

Farmers

The biggest losers are the poorer growers who lost their bean crop, resulting in loss of income on the one hand and a fewer reserves for household consumption on the other. Further, the poorest farmers pre-crisis are generally those who have lost the most due to having to farm on the higher risk lands such as steep slopes.

Estimates of losses of crops in the field in are between 50-90% range: less beans were lost in the mountainous Artibonite areas, see Annex 3 Livelihood Zones. The near-total loss of the cash crop has resulted in a significant loss of income in the immediate term and a shortage in household stocks for domestic consumption in the coming months.

The main impacts of the hurricanes in the rural zones of the Southeast and Artibonite Departments are as follows:

- Loss of approximately 50-90% of normal bean production in particular for the small farmers who tend to farm the most marginal, severely sloped land which is especially susceptible to heavy rains.
- Crop loss deprived poor farmers of an important source of income.
- Crop loss leaves uncertain the status of seed for next planting season.

Households

Non-farm consumers are faced with higher prices in the markets while having fewer resources than usual to acquire the commodity.

Households were very affected by the initial rise in price in the market and the lack of cash that might have allowed them to purchase beans on the market. This has resulted in a decline in household consumption of more than 50% (from 2 lbs to 1.5 lbs per day on average) as well as the frequency of consumption from 4-5 times to 2-3 times per week. However, although many households are beneficiaries of international food aid, coverage is known to be sporadic. Further, reports of looting from temporary shelters following distributions of food and non-food items leaves beneficiaries at risk and this will have implications for any intervention planned8.

Finally, attention should be paid to producer, subsistence households in particular because crop loss is apt to lead to lower household consumption and therefore increased risk of malnutrition.

Gender Issues After the Crisis

Women are the typically main actors in the bean market system; Madame Saras and the retailers. Following the cyclones they face reduced demand, loss of stocks resulting in indebtedness and difficulties in accessing fresh credit to replenish working capital. Further, women are often left with the responsibility for children and are unable to pay for their education and other family expenditures.

A significant post-crisis change, especially in the Artibonite regions is the increase role for Madame Saras since the wholesalers' stocks and storage facilities have been wiped out. Madame Saras have stepped in and are responsible for the bringing in beans supplies to the main markets from other wholesalers and importers (before they mostly traded between the growers and markets. This may have positive outcomes (increased economic activity) and negative (longer and riskier periods away from home and family).

Infrastructure and Services

Key system infrastructure and services are partially or seriously affected depending on the location:

Stocks in stores and warehouses were seriously affected in Gonaives where it was a near-total loss, but only minimally in Jacmel (South-East) which was not as prone to flooding. In Gonaives, wholesalers are still unable to access their stores because of the mountain of mud that clogs the streets.

Transport was seriously interrupted during the weeks following the hurricanes but a gradual amelioration in the conditions of the roads has improved the situation. One example is the instance in Blokos in the Southeast where a landslide blocked the main road to the market but the transporters organised a manual transfer to a second truck on the opposite side of the landslide.

The formal credit system in the capital was not affected; however, outlying regions were more affected, particularly in Gonaives. With the near total loss of their stores, Gonaives wholesalers lack credit to replenish lost stocks. For the informal credit system, the situation is more serious. The retailers are obliged to ask for special consideration.

[8] There are risks involved with both distributions in-kind and CBIs. If CBIs are to be implemented, care will need to be taken on the transfer methods employed and close consultation with beneficiaries will be crucial to ensure the best solutions.

Competition and Integration

In the South East, it was observed that the bean market remains competitive and integrated. The commodity is still widely available in the markets though poor households are less able to access the cash to purchase in normal quantities. The various players in the system are still in place and have adapted to circumstances to ensure the commodity is available.

In terms of integration in Artibonite, after the cyclones, imported supplies remain available and accessible from Cape Haitian, Port-au-Prince and other localities of this department and the local and regional Madame Saras are able to switch quickly from buying and selling local produce to imports.

The wholesalers who trade with the Dominican Republic have adapted to the pockets of shortages in Haiti to increase their imports. An example of this is the 97MT / month imported from DR to fill the gaps.

5.9 Bean Market System Capacity to Respond to Demand

The following observations are evidence that the market system is able to respond to any humanitarian-induced increase in demand:

- Imports from Dominican Republic are continuing at the normal rate[9]
- Sellers in the rural markets, though fewer than usual for the period (because of low production), had more commodity to sell than was being bought. i.e. supply exceeding demand.
- The conditions of secondary and tertiary roads are improving gradually facilitating transport of commodities to and from market.
- All traders expressed the possibility to augment supplies.

Beans Market System Capacity to Respond to Potential Demand

Location	Target HHs	Target Group Needs MT/ month	'Normal' Trade Pre-Crisis MT / month	Current Trade MT / month	Predicted Market Response[10] MT /month	Can Market Respond to Potential Demand?
Artibonite Oxfam	2000	20	73	16	73+	**Yes**. With support: cash injection to HHs and some traders. Traders can access imported beans but need demand to increase.
South-East ACDI/ VOCA	3000	30	224	5-7	30+	**Yes**. With support: cash injection to HHs. Traders have access to DR-imported beans.

In summary, traders expressed need for support to supply households with the beans they require by:

1. Increasing purchasing power of households. This was the overwhelming response of traders in all affected areas. Many said they needed no other form of support.
2. Some traders will need access to credit in order to re-stock (particularly in Gonaives).
3. Some traders will need support to rebuild storage facilities (wholesalers in Gonaives)

[9] 97MT/month is imported from DR for sale in Jacmel, PaP and some rural areas, including La Vallee/Bainet. Exactly how much goes to each area depends on demand (quantities unknown).

[10] The market response with NGO support, i.e. to increase demand by giving cash / vouchers / in-kind (and/or possibly market support to traders, i.e. repair of warehousing, credit, etc.

5.10 Conclusions

To summarise with reference to the original EMMA Key Questions:

How the crisis has affected farmers' access to beans markets (to sell produce)?

The crop losses in this sector will have an impact on national and household food security for at least another year, longer for the areas that are so bogged down with water and mud that planting in time for the next season may not be possible. Especially worrying is the situation for subsistence farmers.

Bean seeds should be provided to farmers to ensure that the subsequent crop is adequate: given the fact that farmers in La Vallee and Bainet lost most of their last harvest, agricultural interventions must be stepped up for the current planting season (November) to ensure that a harvest may be realized in the several months. Currently, farmers have no income to invest in planting due to significant loss of assets and loss of income once they lost their bean harvests.

What is the availability of beans supplies (for purchase/consumption)?

Beans supplies are available in sufficient quantities to be able to supply targeted households. The local and preferred varieties will likely have to be replaced by the cheaper, and less preferred imported varieties. Traders are able to access further supplies and many say they only need demand to increase. Other traders operating in affected areas may need support to supply targeted households.

How has the crisis affected beans market chain actors? And how are they coping?

Destruction of trader stocks and storage facilities, and the breakdown of the informal credit system will affect the early recovery of market system actors in the affected areas: it's likely that prices will take time to decrease to pre-crisis levels as traders try to compensate for their losses; the total loss of warehouse facilities in Gonaives means that buying in bulk is no longer possible and this in turn increases the purchase prices for retailers and small street traders.

Further, the decrease in demand due to either lack of cash or food aid is compounding traders' efforts to recover. Especially worrying for Gonaives is the predicted lengthy delay in rehabilitation and reconstruction due to the enormous amounts of mud clogging the streets and reforming following the smallest amount of rain: current estimates are that it could take up to a year to clean the city. Some organisations are already implementing CfW programmes to support clearance but the activities are small-scale compared to what is needed and impact is minimal. Therefore agencies must anticipate supporting households and traders for longer than normal.

When should food aid be stopped, and how?

According to traders, who seem able to supply the affected regions with the food they require, food aid is detrimental to their early recovery. EMMA teams concluded that food aid must be stopped by the time the next harvest begins. La Vallee has a unique microclimate so they can plant now, but Gonaives probably doesn't have this luxury and will likely plant next February with a harvest around May. FfW and CfW should be timed to correspond with the planting season and ensure that labour is available to devote to this. For Gonaives, the recovery period will be longer, but for La Vallee and Bainet, targeted distributions may only be necessary until the next harvest only if farmers are assisted to recover through targeted seed distribution, fertiliser, etc.

Note too that households usually frequent the markets 3-5 times/week, buying in small quantities only, probably because of lack of cash[11], storage facilities and refrigeration, so organisations considering CBIs or local purchase of beans (to replace imported food aid distribution) would need to consider household storage capacity and advance notification to trades who probably aren't accustomed to selling in bulk, as well as the security risks for households receiving large amounts of assistance.

[11] Most poor households rely on daily labour to purchase food.

Poor households (including producers) are particularly at risk because they rely so much on cash to purchase more than half of the food they consume. Higher prices mean that many are forced to consume less and risk nutritional problems. For the time being food aid is filling the gap for some households (living in communal IDP sites) but targeting remains difficult, and many still have not been reached. Even the households that do receive food aid are at risk from looting so careful monitoring of pre- and post-distribution security together with close community consultation is absolutely necessary for planning of any intervention.

When the next reliable post-harvest estimates are available, agencies will need to consider timing of their interventions to:

1. Avoid activities (CfW) which coincide with harvest periods (when local labour is in high demand)
2. Avoid competing with local food traders with cash-for-food, or food aid programmes, when the harvest is able to meet local demand sufficiently.

5.11 Recommendations and Follow-up

Recommendations

- Current conditions indicate the need to increase the purchasing power of target beneficiaries by injecting more cash into the local economy, which appears robust enough to respond to increased demand with advance notification. In Gonaives, Oxfam recommends cash-for-work to clean the public local school, irrigation canals, drainage canals of Gonaives and the near localities (Enery, Marmelade, Gros Morne).
- Any CBI must be carefully coordinated with target communities so as to ensure the safest and most appropriate responses: this point is critical to successful programming and is one of the key lessons learned from CBI evaluations[12].
- ACDI/VOCA: Local and/or well-adapted bean seeds will be provided to farmers in La Vallee and Bainet in time for agricultural production for the next season and nurseries were started for farmers to increase nutritious and high value vegetables, (e.g. cabbage, eggplant tomatoes, chili peppers, as well as improved sweet potato and yam tubers).
- Oxfam: Bean seeds to be provided to famers in the neighbouring localities of Gonaives and the three communes of Nippes department, as well as credit to farmers to restore productive assets/infrastructure.
- In Gonaives, credit should be provided to wholesalers whose stores were destroyed would allow them to replenish their stocks, contribute toward price stabilisation and lowering of prices, and become actors again in the system[13].
- Market support activities to improve market system performance

  1. Improve on the weekly monitoring of prices for beans, cereals, tubers throughout the chain. This should be done in cooperation with CNSA and FEWSNET. Wider support in the analysis of price data and market systems is needed to contribute towards the CNSA/FEWSNET Food Security bulletins.

[12] Reference: *Evaluation of the Livelihood Programmes in Mapou and Cape Haitian, Haiti, 10-22 February 2005*, by Pantaleo Creti , Oxfam GB Emergency Food Security and Livelihood Adviser. One of the key lessons learned for CBIs was that community participation in decision-making is critical: for instance, following community suggestion, cash and in-kind (rice) was distributed via as many local shops as possible and was considered a highly successful method for safely transferring cash and food.

[13] These recommendations may be followed-up at a later date. In the meantime, another study has led Oxfam to plan to support female small traders to repay their debts.

2. Further analysis in the chains of igname, potato, sweet potato, avocado, citrus in the next six months.

- The use of food aid needs to be carefully monitored in order to avoid competition with local traders. Teams recommend that food aid should be stopped to coincide with reasonable harvests. Food aid distributions and any humanitarian activities should plan activities carefully to avoid coinciding with seasonal activities such as harvest periods. Food aid could be phased out, area by area to ensure markets can copy. Food for Work can then be replaced by Cash for Work.
- Recommendation for better coordination and knowledge sharing among all NGOs and technical services in the South East.
- Finally, all teams strongly recommend the use of EMMA for emergency preparedness and will continue exploration of the beans market system (and others) in less stressful times. Oxfam and ACDI/VOCA plan to prepare baseline market information for critical emergency food and non-food items, develop better relations with traders (together with their logisticians) and prepare for better coordinated responses.

Follow-up and Knowledge Gaps

- Better baseline data is needed before embarking on programming implementation, especially on retailers and small traders: especially number of market actors and how they interact, prices and volumes traded). Any programme monitoring and evaluation will be very difficult without better baseline information.
- Lack of information about normal acreage under cultivation, production and yields which would help in analysis of the magnitude of the problem. NOTE: this may be difficult to obtain as such data is not well documented in Haiti. This lack of data is one of the issues mentioned by FEWSNET as being of concern as it is difficult to predict food security implications at the national level (by region or by crop).
- Lack of understanding of credit system for the Madame Saras and retailers.
- Lack of information on how trade flows from the DR and the quantities traded. Also, no information on how surges in demand affect the DR economy.
- Clearer idea on the estimated time needed for mud clearance in Gonaives so that agencies can plan interventions accordingly. This may require longer term planning than expected.
- Gender: better understanding of how resources are shared in the household, especially given the statements that it is men who handle the money even if women are doing the trading.
- Gender: better understanding of how the increased economic activities of the Madame Saras will affect these traders and their families.

5.12 Programming Considerations

Whilst some of these recommendations are in the process of being planned and implemented, other recommendations are still under discussion. For instance: ACDI/VOCA and Oxfam will both support farmers with seeds and probably credit to rebuild key infrastructure; ACDI/VOCA are will not do any further emergency distributions or CBIs due to programmatic constraints as well as the results of this study and in light of other evaluations, Oxfam may support small, female traders instead of wholesalers.

Annex 1: Participant Contact List: EMMA Haiti - 29 October to 14 November

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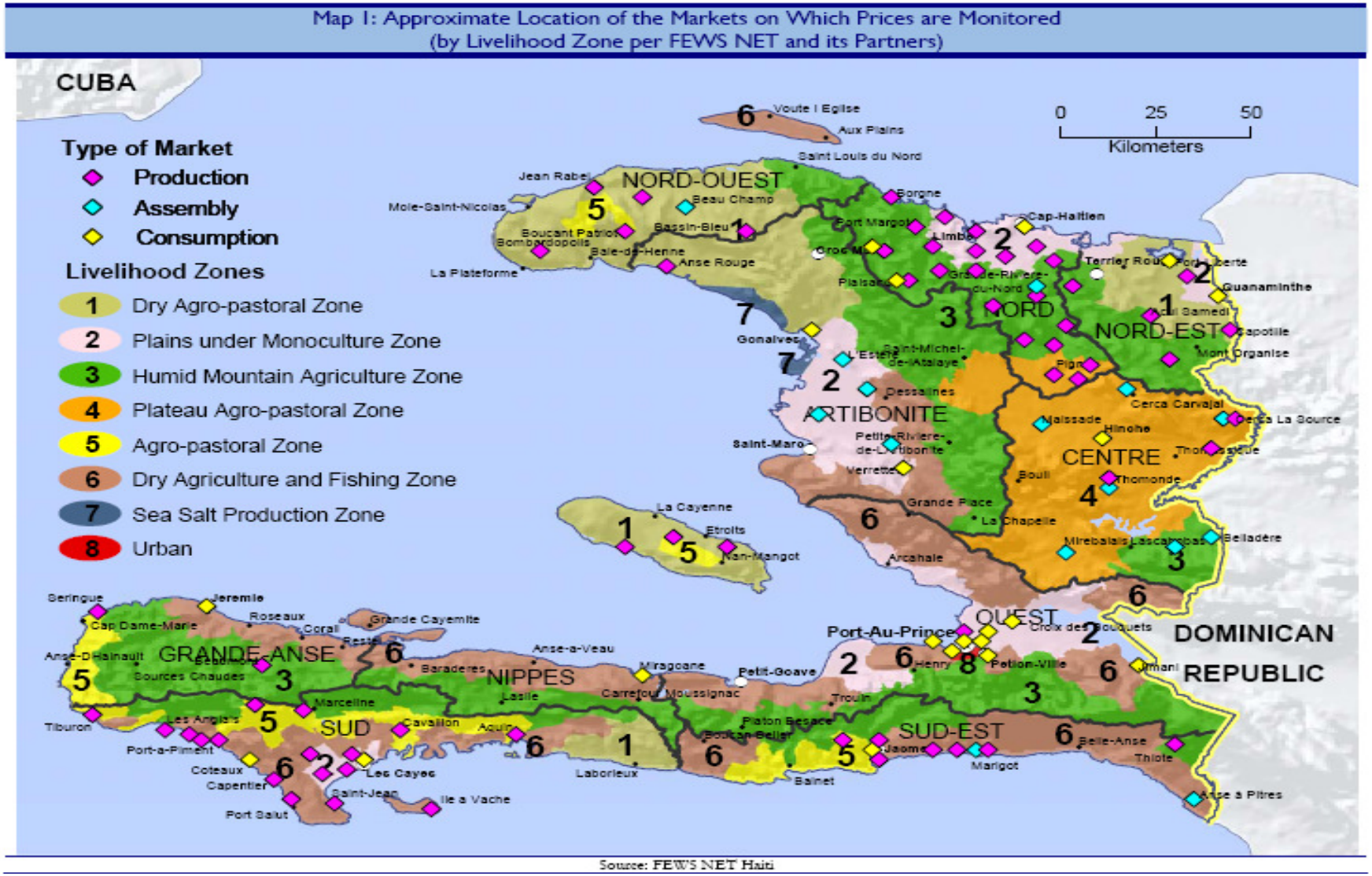
*Participated in parts of the training & analysis. Will not do field work, rather support from Port au Prince.

15. Facilitator **Anita** Auerbach, EMMA Consultant, Practical Action Consulting. Email: anitayeomans@gmail.com
16. Observer/Trainer **Tony** Dines (observed training to later develop the training materials for EMMA) Email: tony@tonydines.co.uk
17. Interpreter Jn Baptiste **Wen**ialnio B. Tel: 3486 6087 Email: wenialnio@hotmail.com

Annex 2: Seasonal Calendar: Beans Market System

		JAN	FEB	MAR	APRIL	MAY	JUN	JUL	AUG	SEPT	OCT	NOV	DEC
RAINS	HIGH ZONE												
	LOWLANDS												
PLANTING	HIGH ZONE		PLANTING					PLANTING					
	LOWLANDS										BIG PLANTATION		
HARVEST	HIGH ZONE				Smaller						Important		
	HIGH ZONE	Important											Important
STOCKAGE	HIGH ZONE	CONSUMATION					CONSUMATION	STOCKAGE FOR SALE & CONSUMATION				CONSUMATION	SALE
	LOWLANDS	STOCKAGE FOR SALE & CONSUMATION										CONSUMATION	SALE
EDUCATION COSTS	HIGH ZONE							HOLIDAYS		E			
	LOWLANDS												
FESTIVALS	HIGH ZONE												
	LOWLANDS	King's Day	Carnaval		Easter			Fetes	Champetres				Christmas
WEATHER / CYCLONES	HIGH ZONE						Cyclones		Cyclones		Cyclones		
	LOWLANDS												
PRICES	HIGH ZONE	↑			↓				↑		↓		
	LOWLANDS												
ROAD CONDITIONS	HIGH ZONE	OK			BAD		OK		BAD			OK	
	LOWLANDS												
OXFAM & ACDI/VOCA PROGRAMMING	ZONE HAUTE	TBC											
	ZONE PLAINE	TBC											

Annex 3: Livelihood Zones



Annex 4 : Beans MS Data Table

No. Actors	Actors-Location	Marketed Quantities - 2008 (50kg sack)			Price - 2008 (Gourdes)		
		May	Jun	Jul	May	Jun	Jul
3	Importers PAP						
5	Wholesalers PAP						
20	Wholesalers Gonaïves	400	350	300	2150	2150	2150
75	Large retailers Gonaïves	50	40	40	2350	2250	2250
200	Small retailers Gonaïves	4	4	4	2580	2280	2280
3	Wholesalers Jacmel	100	50	30	2600	2550	2550
25	Large retailers Cayes-Jacmel						
15	Small retailers Bainet/ La Vallée	20000		8			

Note:

- Data table not complete.
- Pos-Hurricanes in Gonaives: the market for wholesalers has been completely destroyed and they've lost all their stocks so no information available.