

# Rapid Market Assessment Report

## West Guji and Gedeo

### May 2019



## 1. Overview and Objective

Violent clashes along the border areas of Gedeo and West Guji zones in early June 2018 led to the displacement of 883,357 IDPs across the two zones at its peak<sup>1</sup>. Following a series of peace and reconciliation efforts by the Aba Gadas (traditional leaders) of Gedeo and West Guji, a government led return process commenced in mid-August 2018 whereby a substantial number of IDPs returned to their woredas, although a large number could not return to their homes and continue to live in displacement or with host communities. The Government considers these as returns while the international community considers them as still displaced. In this context, the Shelter/NFI Cluster developed an Operation Plan to guide partners to respond to the need of Shelter/NFI for returnees and remaining IDPs.

Rapid Shelter/NFI Assessment Report in West Guji and Gedeo conducted in May and Protection Monitoring Report for West Guji<sup>2</sup> indicate that IDPs first priority after the return is Shelter. Considering the duration required for procurement of ES/NFIs and the rain season, the Ethiopia Shelter Cluster carried out a Rapid Market Assessment on plastic sheets in the local markets in West Guji and Gedeo to understand if cash assistance will be more suitable than in kind.

A previous market assessment<sup>3</sup> conducted by the Shelter Cluster in both zones determined the market functionality and feasibility of cash-based interventions for shelter materials and services. DRC<sup>4</sup>, IOM<sup>5</sup>, PLAN<sup>6</sup>, and IRC<sup>7</sup> conducted market assessments in 2018 to further understand markets capacity, risks, protection mitigation measures, prices, availability and different types of cash-based interventions (CBI) applicable. Therefore, this assessment focuses only on the following objectives:

- 1) Mapping the vendor's capacity to provide medium and high-quality plastic sheets
- 2) Assessing current prices, quality, and accessibility of plastic sheets in the local markets
- 3) Exploring best methodologies to provide plastic sheets to IDPs rapidly

This assessment doesn't cover general cash feasibility considerations since they are already included in the previous market assesses.

## 2. Methodology

The assessment used a mixed methodology to gather data, conducting surveys with structured questioners and quality tests using high-quality plastic sheets as a sample to evaluate the quality of the

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<sup>1</sup>[https://www.humanitarianresponse.info/sites/www.humanitarianresponse.info/files/documents/files/gedeoguji\\_displacement\\_situation\\_up\\_date\\_no\\_7\\_.pdf](https://www.humanitarianresponse.info/sites/www.humanitarianresponse.info/files/documents/files/gedeoguji_displacement_situation_up_date_no_7_.pdf)

As of 14 August 2018, the number of IDPs has reduced to a total of 694,327 persons (106,135 HHs) in Gedeo zone. The IDPs are spread across Bule, Dilla Zuria, Kochere, Gedeb, Wanago, Yirgachefe woredas and Dilla and Yirgachefe Towns. In West Guji zone, zonal authorities confirmed that there are at least 189,010 people (33,394 HH) at 43 collective sites and 18 host communities. The IDPs are spread across Abaya, Birbira Kojowa, Bule Hora, Gelana, Hambela Wamena and Kercha woredas.

<sup>2</sup> West Guji | IDP Protection Monitoring Dashboard

<sup>3</sup> Shelter Materials and Services Market and Cash Feasibility Assessment: Gedeo/West Guji Zone. September 2018. Shelter Cluster

<sup>4</sup> Ethiopia Response: Modality Due Diligence & Cash Feasibility Rapid Assessment in West Guji. September 2018. DRC

<sup>5</sup> Gedeo And Guji Zone Market Assessment Report. July 2018. IOM

<sup>6</sup> Feasibility Study on Cash Transfer Programming for the Returnees and the Host Communities in Gedeo and West Guji Zones. October 2018. PLAN INTERNATIONAL

<sup>7</sup> Rapid Assessment For Market (Ram) Report Wrest Guji Zone. May 2018. IRC

items and classified them in poor, medium and high quality after a technical test. This quality test considers the capacity of the plastic to resist traction, compression, trimming, scratch, opacity, and space between patterns. The questionnaire (see Annex) was developed by the Shelter Cluster Cash specialist taking into consideration geographical location, market access, and vendor capacity.

The assessment covered all potential and functioning markets in Gedeo (Dilla, Wenago, Yergachefe, Gedeb, and Chelelectu) and West Guji (Bule Hora, Kercha, Dimtu, and Gerba) and data are collected from service providers (vendors) by using structured questionnaires.

## 3. Main Findings

### 3.1 Availability and Quality

#### 3.1.1 Gedeo

- **Dilla:** There are at least eight vendors in Dilla providing plastic sheets of different qualities, medium and poor. However, there is one supplier that has a high-quality plastic sheet and most vendors can increase their capacity based on demand and preconditions. It will take up to two weeks to receive all the items.
- **Wenago:** There are at least five vendors. They receive goods from Dilla, and they don't have a direct network with the distributors from Addis Ababa. The quality of the plastic sheets is medium and poor, but they can request high quality from Dilla.
- **Yergachefe:** There are at least six vendors providing medium quality plastic sheets. The vendors have enough stock and can increase their capacity within two weeks.
- **Chelelectu:** There are at least five vendors providing medium quality plastic sheets and one with a stock of high quality. This vendor acts as the supplier for the market in Chelelectu and stores the supplies coming from Dilla in a warehouse in town. He can easily increase the capacity of all the vendors according to the demand. The medium quality plastic sheet is cheaper than in other markets (35-46 ETB per meter).
- **Gedeb:** There are at least four vendors providing poor and medium quality plastic sheets. Some of them have suppliers directly from Addis and Moyale (Kenya). They can increase their capacity in less than two weeks.

#### 3.1.2 West Guji

- **Bule Hora:** There are many vendors providing different qualities of plastic sheets. Among the ten vendors assessed all have medium quality and two have high-quality item. Most of them can increase their supplies in less than two weeks.
- **Kercha:** There are five vendors providing medium quality plastic sheets and one of them has also high quality. The suppliers are from Bule Hora and their current capacity is high and can increase the stock within two weeks.
- **Dimtu:** This town has only one vendor providing plastic sheets from Dilla and they are poor quality. There is no capacity to serve Hambela Wamena with this supplier. Partners providing in-kind should target this area.

- **Gerba:** There is only one store selling plastic sheets and the quality is very poor. The supplier does not have the capacity to increase the stock.

### 3.2 Plastic Average Price

Quality of plastic sheet	Size Roll	Price (ETB) per meter	Size Piece	Price (ETB) per piece
Poor quality	2x100 m	30 - 35	4 x 5 m	200 - 350
Medium quality	2x100 m	35 - 55	4 x 5 m	350 - 400
High quality	2x100 m	70 - 75	4 x 5 m	350 - 450

For detailed information about suppliers contact [shelternfi.gudjigedeo@gmail.com](mailto:shelternfi.gudjigedeo@gmail.com)

## 4. Recommendations

### 4.1 Gedeo

- Implementing partners operating in Gedeo zone should monitor vendor capacity in Wenago and seek ways to support restock and avoid any delays. All the vendors have medium quality plastic sheets. There is only one main supplier based in Dilla who distributes to most of the vendors and can increase their capacity providing high-quality plastic sheets.
- There is access to medium quality plastic sheets in the market but low on a high-quality item. If there is no conditionality in the cash provided, IDPs and returnees may choose lower quality plastic sheets. This can be mitigated through vouchers.

### 4.2 West Guji

- In West Guji Zone all the vendors are willing to increase their capacity and have access to high and medium quality plastic sheets. Bule Hora is the location of Gedeo/West Guji with the higher number of vendors providing plastic sheets and the high quality is easily found.
- The medium quality plastic sheets are available in all the markets except in Dimtu town, and the high quality is available mainly in Bule Hora with the highest price of 75 ETB per meter. The high-quality lasts for at least two years, whereas the medium quality deteriorates faster.

In areas where IDPs and returnees don't easily access plastic sheet (Gerba) consider combining cash and distribution of plastic sheets. However, in Hambala Wamana it's also difficult to access to NFIs, so in kind or voucher fairs could be organized. Fairs would be a faster and cost effective in terms of logistics, transportation and warehouse. In Kerch and Bule Hora direct cash is a better option for delivery of ES/NFI kits.

## 5. Other Recommendations

In August 2018 there was a temporary suspension of the implementation of cash-based interventions in Gedeo and West Guji zones due to targeting inclusion and exclusion errors and beneficiary protection

risks during the activities<sup>8</sup>. Currently both zones allow cash and voucher assistance and a Cash WG was established to support the program delivery in both locations<sup>9</sup>. The Ethiopian Cash Working Group (ECWG) recommended mitigation measures that implementing partners should consider. Some of them include:

- *Beneficiary involvement, sensitization and information sharing: Share information and sensitize the beneficiaries on who is targeted, why they are targeted, why -the transfer values may be different from site to site. Organizations are strongly encouraged to coordinate and harmonize transfer values where possible. Authorities to consult with host community groups e.g. youth groups and address perceived grievances.*
- *Apply an age, gender and diversity (AGD) lens to assessments, targeting, design, implementation, monitoring and accountability, to ensure that people with specific needs and protection risks are identified*
- *Conduct a risk analysis. Embed monitoring of identified protection risks and benefits into program monitoring processes and post-distribution monitoring or similar tools.*
- *Thorough and routine sensitization of the local stakeholders in particular the local communities about the CBA; roles and responsibilities, risk and mitigation efforts, challenges, amount and frequency of transfer value, geographic and beneficiary targeting criteria, and feedback mechanisms.*
- Distributions of in kind and cash should not be mixed in the same kebele, it may create discontent among those receiving in-kind assistance.
- Implementing partner providing cash for NFI should ensure they are covering the minimum cost for the full package kit (3.500 ETB) and the minimum expenditure basket<sup>10</sup> (3.800 ETB) therefore it should be harmonized to reduce tensions among beneficiaries.
- Targeting: All the implementing partners and governmental bodies should respect the targeting guidelines that have been endorsed by the government in March 2019. A risk analysis should be carried out after verification before distributions.
- During cash payments minimize the exposure of the beneficiaries and avoid open spaces to reduce the risk of theft and other protection and safety concerns.

Main recommendations from the ECWG Guidelines Note<sup>11</sup>:

- *In most of the assessed IDP sites and markets in SNNPR and West Guji, cash interventions are feasible, acceptable and a preferred modality for the provision of humanitarian assistance to these IDPs.*

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<sup>8</sup> Temporary suspension of the implementation of humanitarian Cash Based Interventions (CBA) in Gedeo and West Guji zones: Mitigation Measures. September 2018. ECWG

<sup>9</sup> Ethiopia Response: Modality Due Diligence & Cash Feasibility Rapid Assessment in West Guji. September 2018. DRC Gedeo and West Guji Multi-Sector Cash Based Response Guidance Note. August 2018. ECWG

<sup>11</sup> Gedeo and West Guji Multi-Sector Cash Based Response Guidance Note. August 2018. ECWG

- *In this context, a household on average is six members and in polygamous families, a vulnerable woman with her children conforming to an average of six members can be treated as a household and targeted to receive assistance.*
- *Financial Service Providers (FSPs): FSPs exist including OMO Microfinance and several Commercial Banks. The Ethiopian Postal Service is present in major towns, however, coverage outside of these markets/towns is limited. Part of the displaced population have lost their identity cards and cannot fulfil the ‘know your customer’ (KYC) requirements which leaves agencies exploring ways of overcoming this challenge e.g. getting authorization through the EOC and woreda authorities while IDP site committees participate to identify the household heads in their specific IDP sites.*
- *The ECWG recommends payments be made through a FSP in promoting transparency and increased accountability. Direct cash transfers should be a measure of last resort, and only used if all the other options fail/are not feasible, as direct cash raise the possibility of security or protection concerns*
- *Collaborate and coordinate the response across the different clusters and with the involved humanitarian actors ensuring proper targeting of cash recipients. Use market prices to calculate the value of what is to be provided in conjunction with other cluster partners as to maintain harmonized values, noting varying values previously led to discontent among beneficiary groups;*
- *The cash response will specifically cover the emergency needs of IDPs with a basket including - NFIs, WASH, protection, food and including clothing, cooking fuel and lighting. Bellow the standard baskets as guide:*

## 6. Assessment Questioner

### SHELTER (PLASTIC SHEET) MARKET ASSESSMENT

Interviewer and vendor information				
Name and position of staff conducting the interview		Interviewer Organization		
Interviewer Gender	a) Male b) Female	Interview date		DD MM YY
Vendor description, Contact details of informant(s)	<i>Vendor description includes whole seller, manufacturer, retailer etc....</i>			
Gender	Female		Male	
A. Geographic details				
Name of marketplace : (refers to Market being assessed)	Region	Zone	Woreda	Kebele
Q1. Type of marketplace (E.g. local/woreda/regional/zonal etc... include if a mobile market etc...)				
Q2. Distance: Approximate distance of marketplace from the location of IDPs or IDP site in KM				
B. Market Access				



Q3. Do IDPs have free access to this market? <i>(if the answer is YES, skip to Q3.)</i>	a) Yes b) No
Q4. If the answer to the above question is <b>NO</b> , please explain	
Q5. How do they travel to the marketplace?	a) on foot b) by bus/van c) trucks d) animal or animal cart e) Other, specify
Q6. Do IDP women have free access to this market?	a) Yes b) No
Q7. If the answer to <b>Q6</b> above is <b>NO</b> , please explain?	
<b>C. Plastic sheet market data</b>	
Q8. Is plastic sheet available in the marketplace? <i>(if the answer is No, end the interview and please proceed to another market)</i>	a) Yes b) No
Q9. If available, how many vendors currently have the plastic sheet in stock? <i>(in the market)</i>	
Q10. What is the quantity of plastic sheets available with each vendor? <i>(on average)</i>	
Q11. Describe the quality of the plastic sheet available in the market place? <i>(reference point is plastic sheet that is normally distruted by humanitarian agencies – mainly through the ESNFI Cluster?)</i>	a) Similar to what is distributed by agencies b) A slightly lower quality Poor quality c) Very poor quality d) Other, specify
Q12. What is the size of the plastic sheet you currently have?	
Q13. What is the cost of the plastic sheet? <i>(please indicate size and cost)</i>	
<b>E. Vendor capacity</b>	
Q14. Do you (vendor) have the capacity to increase the supply of plactic sheet if the demand increases ?	a) Yes b) No
Q15. If the answer to the above <b>Q14</b> is <b>YES</b> , would you borrow money in order to increase the supply?	a) Yes b) No c) I have sufficient amount of money to supply more d) other, please specify
Q16. Where will you borrow the money from?	a) bank b) other business men/women c) microfinance institution d) family members e) other, specify
Q17. How long will it take you to get the additional cash/money?	a) 1 - 2 weeks b) 3-4 weeks



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	c) 1- 2 months d) more than 2 months e) other, <i>please specify</i>
Q18. How long will it take for you to bring the additional supplies?	a) 1 - 2 weeks b) 3-4 weeks c) 1- 2 months d) more than 2 months e) other, <i>please specify</i>
<b>Ask for any other information and thank the vendor :</b>	

## 7. Acknowledgment

The Cluster thank you PiN (People in Need) for participating in the Assessment.