

Wheat Flour Market system in Gaza

Emergency Market Mapping Training and Analysis



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EMMA Team



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Introduction

As part of the initial training on the EMMA market mapping assessment and the analysis of a case with data collected and analysed according to specific field methods OXFAM and other local and international agencies participated on an initial exercise for three value chains in Gaza in order to practice the methodology and the analytical steps that are required to carry out an EMMA. The current report provides the result of the initial assessment of the wheat flour value chain and represents a valuable introductory analysis that will require further field and quantitative work in order to provide end-users with a comprehensive description and quantification of the various components within the value chain framework defined in this report.

In order to measure the importance of the wheat flour market for the Gaza local economy and to explore some of the possible orientations for further analysis, the training group carried out an exercise to define the main supply-side actors and flows of wheat flour in the Gaza market. This initial study explored key actors, the mechanisms determining the supply and demand relationship, as well as potential opportunities in the wheat flour value chain in the context of longer term resilience-building framework. The present study, however, did not integrate in-depth price analysis or the impact on market functioning due to lack of purchasing power of the targeted population.

1. Situation Analysis

Gaza is home to 1.7 million people. Of these, an alarming 59% i.e. 1.02 million people live below the poverty line (PCBS 2012). Years of blockade and depleting natural resources provide very little options for economic development of Gaza. The already high unemployment rate i.e 31.9% in the second half of 2013 is expected to rise further with the suspension of economic activity through the tunnels and their final closure by end of October 2013.

In 2012, 57 percent of households in the Gaza Strip were food insecure, a surge from 44 per cent in 2011. An assessment conducted by ECHO in 2012 highlights that *'that vulnerable households with low incomes and limited or no employment will continue to require support to meet their basic food and non-food needs'*.

Over the years, aid agencies have played a crucial role in ensuring that the food insecure households in Gaza have access to adequate food throughout the year. *Khobz* (bread) forms an important source of carbohydrates in the daily diet of Palestinian population. It is therefore no surprise that wheat flour comprises a significant proportion of food rations distributed to food insecure households.

Given the importance of wheat flour in the local economy and dietary habits, it was agreed that the wheat flour market would be one of the three critical market systems chosen for a pilot study as a part of the Emergency Market Mapping and Analysis (EMMA) training in Gaza.

2. Target Group:

In Gaza, large proportion of the poor and very poor households consume home baked bread and they are dependent on the market for the supply of wheat flour whereas the better off and middle income households tend to usually buy bread from bakeries on a daily basis. Owing to this dependence of the

poor and very poor households on the market system, households living below the poverty line in Gaza were chosen as the target group for the EMMA.

The Palestinian Central Bureau of Statistics 2013 defines poor and very poor as:

Poor: income up to 464 NIS/person/month

Very poor: income up to 381 NIS/person/month

The wheat flour market system EMMA was conducted from the 20th to the 30th of October 2013. The exercise included two and a half days of classroom training, four days of data collection and two days of analysis. During this period a range of key informants were interviewed to gather adequate information to conduct gap analysis, market analysis and a response analysis. All EMMA exercises are based on key analytical questions that define the scope and specify line of enquiry for the EMMA process. Following key analytical questions were chosen for the wheat flour market system in Gaza.

3. Key analytical questions for the wheat flour market system in the Gaza Strip:

- a. In case of total closure (of border with Israel) of two weeks, how long will the stocks of wheat grain/flour last?
- b. If UN agencies stop imports / distribution of wheat flour as a part of general food distribution, would the market be able to fill the gap in importing the required quantities to match the overall Gaza needs?
- c. If yes, for how long?

4. Calculating the Gap:

Gap analysis is an important step in EMMA to arrive at the answers to the key analytical questions. In case of wheat flour market system analysis, gap in needs of the target group must be established first and for this it is important to define the 'need' threshold or the requirement. In case of food commodities this threshold is calculated in Kilocalories, therefore it was decided to follow 'sphere standard' recommendation of 2100Kcal/person/day. It is further recommended that these 2100Kcals must come from a balanced diet and that carbohydrates must not provide more than 50% of the daily Kcal requirement. Discussions with key informants highlighted that due to low purchasing power and high food prices, poor households in Gaza are unable to afford diverse sources of carbohydrates therefore they rely on bread made of wheat flour for meeting most of their daily carbohydrate needs. Based on this information, the 'need' was set as follows:

50% of 2100Kcal/person/day = 1050 Kcal/person/day from wheat flour.

600 gms wheat flour = 2100Kcal

Therefore, **300 gms of wheat flour/person/day** was set as the 'need' for the target population.

Local government and aid agencies in Gaza use actual consumption patterns for deciding the local estimates of need. Therefore, it was agreed to use a second 'needs' threshold for the EMMA. Local estimates suggest that on average 320 gms of wheat flour is needed by individuals/day. The second threshold i.e. needs, was therefore chosen as **320 gms of wheat flour/person/day**.

Based on the above mentioned thresholds, the total wheat flour required for the entire population of Gaza (i.e 1.7 million) is 15,300 Ton/month and 16,320 Ton/month respectively. The total wheat flour requirement for the 1.02 million poor people in Gaza is 9,180 Ton/month and 9,792 Ton/month

respectively. Key informant interviews highlighted that own production does not contribute to the food basket in Gaza therefore, 100% of the need is purchased from the local market. Income levels in general are very low and employment opportunities are progressively diminishing which makes it extremely challenging for poor households to purchase wheat flour from the market. Aid agencies usually provide a significant portion (almost 100%) of the wheat flour needed at household level through food aid. For these reasons, it was assumed that the households have very little income therefore the total 'gap in needs' is the same as the 'need'.

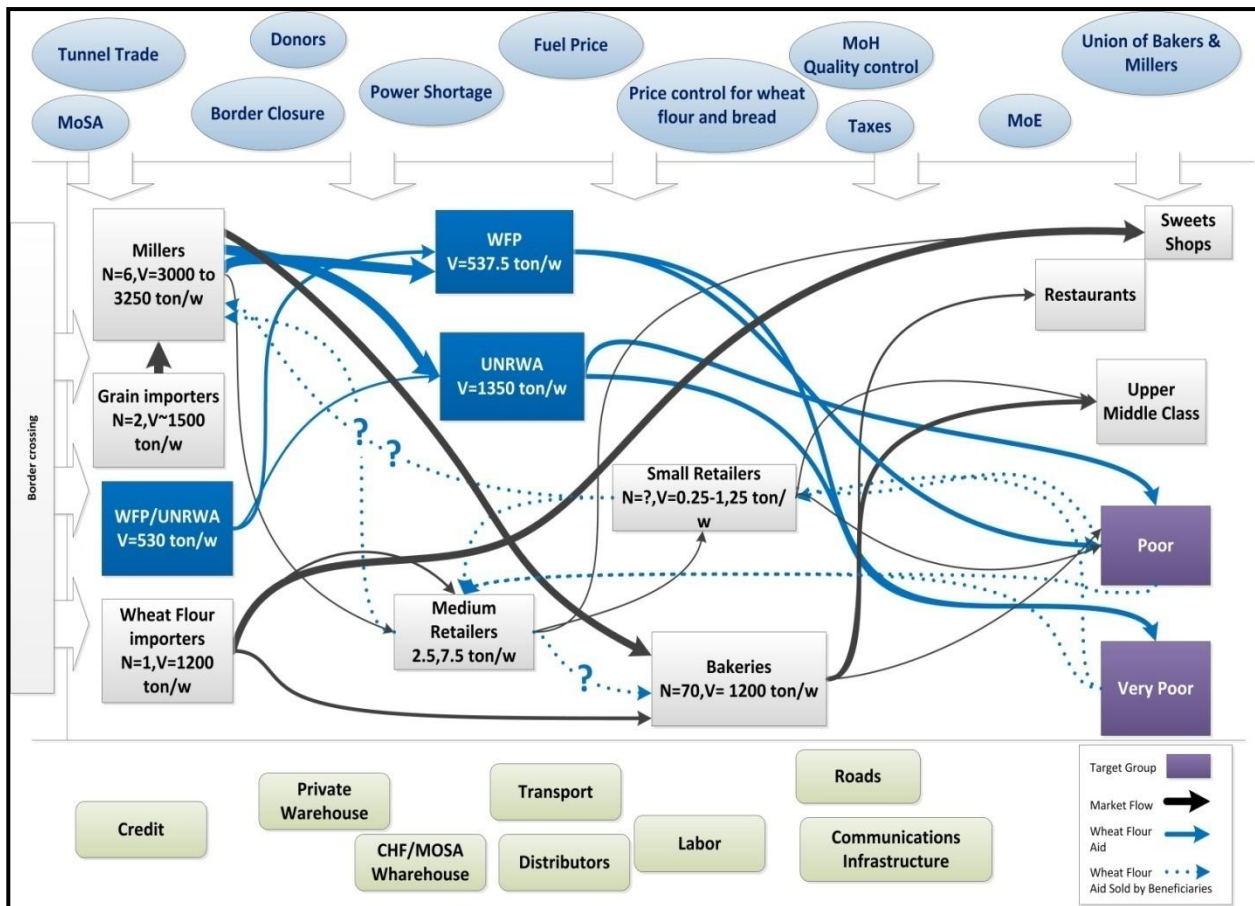
Need (wheat flour)	Gap in needs (wheat flour)	Ton/Month required for total population of 1.7 million people	Ton/Month required for poor population of 1.02 million people
300 gms/person/day	300 gms/person/day	15,300	9,180
320 gms/person/day	320 gms/person/day	16,320	9,792

5. Market Mapping:

The wheat flour market system in Gaza is totally dependent on imports from Israel through the only functioning crossing Kerem Abu Salem. The informal trade via the tunnels from Egypt has ceased completely since mid-October 2013. The production of wheat in Gaza is extremely limited and according to key informants the variety produced is used mainly as grain for *frikke* (roasted wheat) and *burgul* (type of cereal).

To find answers to the key analytical questions mentioned in section 3 of this report, it is important to understand the market system and determine a baseline. In case of the wheat flour market system, the situation at the time of conducting the EMMA was considered as the baseline. Figure 1 below presents the baseline market map for the wheat flour market in the Gaza strip.

Figure 1: Baseline Market Map for Wheat flour in Gaza



The market chain for wheat flour in Gaza comprises a complex web of actors and service providers. The key actors in the chain are the importers of wheat grain, millers, medium and small retailers, UN agencies, bakeries and consumers. The functioning of this chain is influenced at different stages by the Israeli border authorities, Ministry of National Economy (MoNE) and prices of essential services.

Grain importers: Gaza has two private importers of wheat grain. They work with business partners in Israel who receive the consignment of wheat on their behalf at the ports of Ashdod and Haifa. Owing to restriction on banking transactions in Gaza, importers work very closely with these business partners and 'trust' is the backbone of this business arrangement. In some cases, the Israeli business partners are also provided with signed cheques (blank) by importers in Gaza to facilitate the transactions. After receiving the consignment, these business partners transport the grain to Kerem Abu Salem commercial border crossing and this is where the importers in Gaza gain full control of the product. Once in Gaza, the imported grain is then sold to local millers by the grain importers. These importers import approx. 1500 to 2500 Ton of wheat grain/week.

Millers: In addition to the grain importers mentioned above, Gaza has six importers cum millers. These importers cum millers use the same system as other importers to import wheat grain but they have a higher storage capacity i.e a maximum storage capacity of 45,500 Ton of wheat grain. They however usually stock approx. 18,000 to 19,500 Ton on an average and at the time of conducting this EMMA, the total wheat grain stored with millers was around 12,500 Ton. The millers add value to the product through the milling process and this is the first stage in the market chain where the price of wheat flour is determined. They import approx. 12,500 Ton/month and buy the grain from other importers as well. The mill running capacity is typically 400 ton of wheat flour/ shift. These millers sell the flour to

medium retailers, bakeries and to the UN agencies for general food distribution. Sale to the UN agencies is through an open tender process, whereas the sale to medium retailers and bakeries is through orders. Bigger millers employ distributors who contact medium scale retailers and bakeries every week and take their orders, whereas smaller scale millers receive orders directly from medium scale retailers and bakeries. The flour is delivered to the shops and bakeries by the millers. All millers in Gaza are grain importer too and are therefore powerful actors in the market chain.

UN agencies: WFP and UNRWA play a big role in the wheat flour market in Gaza. Wheat flour is a significant part of their general food distribution to food insecure non-refugee and refugee population respectively. Cumulatively, the two UN agencies provide wheat flour to approximately 181, 000 households in Gaza, (WFP: 44,000 and, UNRWA: 137,000). They do not only import wheat flour but they also purchase locally. WFP imports 60% of its requirement and purchases 40% of its requirement in Gaza¹. This is stored in local warehouses of their counterpart MoSA and their cooperating partner CHF who also distribute the wheat flour to beneficiaries of WFP's assistance programmes. On the other hand UNRWA purchases almost 100% of its requirements from the local market in Gaza and stores it in two locations within Gaza in their own warehouses. The distribution to beneficiaries is handled directly by UNRWA staff.

Importer of wheat flour: Only one private sector actor imports wheat flour into Gaza and this importer deals with a niche market. The wheat flour imported by this importer is Class A flour that is mostly used for confectionary items such as cakes, pastries and sweets. The quantity imported is typically 4,000 Ton/month. On an average 30% of this class A flour is purchased by bakeries for mixing with Class B flour to enhance the quality of bread. The major consumers for this importer are the sweet shops, bakeries and restaurants.

Medium scale retailers: Wheat flour is consumed mostly by the poor and very poor households in Gaza. Other sections of the population mostly consume bread that is purchased from bakeries. For this reason, big retailers and supermarkets do not stock and trade in wheat flour. After the millers, medium retailers are the biggest actor in the market chain and the difference of scale between the two actors is huge. Millers typically produce approx.400 Ton of wheat flour/day and medium scale retailers typically buy 2.5 – 7.5 Ton of flour/week. They buy from the millers and usually sell the flour to small retailers. Some medium scale retailers also buy the flour distributed through UN agencies directly from the beneficiaries. This is depicted in blue dotted lines in figure 1. Such medium-scale retailers are few and their business depends on wheat flour trade and they typically have shops close to UN agencies warehouses/ distribution points. They buy 50 Kg bags at NIS 75-80/bag and 30 Kgs bag at NIS 43-48/bag closer to the time of the distribution. The volume of trade of these retailers, those who deal in resale of wheat flour received as aid, is not clear and the responses indicate a wide range between 145 bags(50 kgs/bag) or 242 bags (30kgs/bag)/day to 544 bags(50 kgs/bag) or 907 bags (30kgs/bag)/month. The field teams were unable to clearly establish the flow of the flour from these retailers. Exploring the flow of wheat flour received as food aid within the market system was not within the scope of the EMMA exercise therefore, it was decided not to pursue this line of enquiry. Most other medium scale retailers sell flour to smaller retailers but they sell some bags of flour in their own shops as well, though this is not their main business. Wheat flour retail is not considered very profitable for 2 reasons (i) large section of the consumers are poor and very poor households who directly receive wheat flour from the

¹ This is a planning figure for the share of locally purchased commodities, established at the beginning of the project implementation. Actual portion of local purchases during the implementation of the project will depend on i) availability ii) competitiveness of local vs regional /international prices and iii) operational prioritisation.

UN agencies; and (ii) the price of wheat flour is controlled by the Ministry of National Economy, so the margin for retailers is small (approx.5%).

Small scale retailers: Small scale retailers are typical small shops in neighbourhoods and operate at an extremely small scale. They typically sell approx. 20 bags of wheat flour/week and source wheat flour from the medium scale retailers. These retailers sell a range of household items and wheat flour is one of these items. Their consumers are poor and very poor households who purchase or buy flour on credit close to the end of the WFP/UNRWA distribution cycle.

Poor and very poor households: In Gaza, 1.02 million out of a total population of 1.7 million people are classified as living below the poverty line and receive food and cash assistance from UNRWA, Ministry of Social Affairs (MoSA) and WFP. While UNRWA's mandate allows it to provide relief assistance to the poor refugee population only, WFP and Ministry of Social Affairs support a large part of the poor non-refugee population. The food aid programmes have specific target groups (poor refugee and non-refugee) and there are no overlaps between these programmes. (UNRWA is responsible for the non-refugee and WFP / MoSA are providing assistance the non-refugee poor groups). Within the different safety nets / social programmes, there is however some overlap between the food aid assistance (whether UNRWA or WFP/MoSA) and the MoSA cash assistance, as the targeting is mainly based on poverty and related food insecurity. Within the food aid recipients, even though a large part of this group receives wheat flour as a part of general food distribution, they buy flour from the market towards the end of the distribution cycle. The reason being that they would have either sold part of their ration earlier on in the distribution cycle to meet their cash needs or the amount distributed does not cover 100% of their specific household need.

Operating environment: The smooth functioning of the market chain depends a lot on the Israeli border authorities. The opening and closing of the border-crossing has been extremely erratic in the past couple of years. While some border closures are predictable e.g. Yom Kippur and on weekends, it is the unannounced closures that can negatively affect the market chain in importing wheat grain into Gaza.

In addition, the wheat flour trade is highly regulated by the Ministry of National Economy (MoNE) that sets a ceiling on the prices for wheat flour and bread and also fuel. With the closure of informal trade with Egypt through the tunnels, the supply of cheaper wheat flour and fuel have ceased since mid-October 2013 and this has affected the market. The mills are now doing good business by producing more wheat flour in the country whereas the margins for bakery owners have reduced significantly as bakeries run partially on fuel. Price of bread is fixed by MoNE and it cannot be increased by bakery owners without the approval of MoNE. At the time of conducting this EMMA, the bakery owners' union had decided to reduce the weight of bread from 3kgs/bag to 2.7 kgs/bag of bread in the absence of a final decision from the MoNE allowing for the price of the bread to be increased.

The price of fuel has seen a big change. The cost of the Egyptian diesel imported via tunnels 2.5 NIS/litre whereas the diesel imported from Israeli costs 6.1 NIS/litre. According to the key informants there could be a shortage of fuel in the near future because the only commercial crossing with Israel, Kerem Abu Salem in the south of the strip, is ill equipped to supply fuel for the needs of Gaza. Karni crossing in the north that halted operation in 2007 used to have a full infrastructure to allow large quantities of carburant into Gaza. However, after the war this was closed and fuel and gas begun entering from the tunnels from Egypt. For that reason, the only crossing now i.e. Kerem Abu Salem does not have the adequate infrastructure to supply enough quantities to meet the needs in Gaza.

6. Analysis:

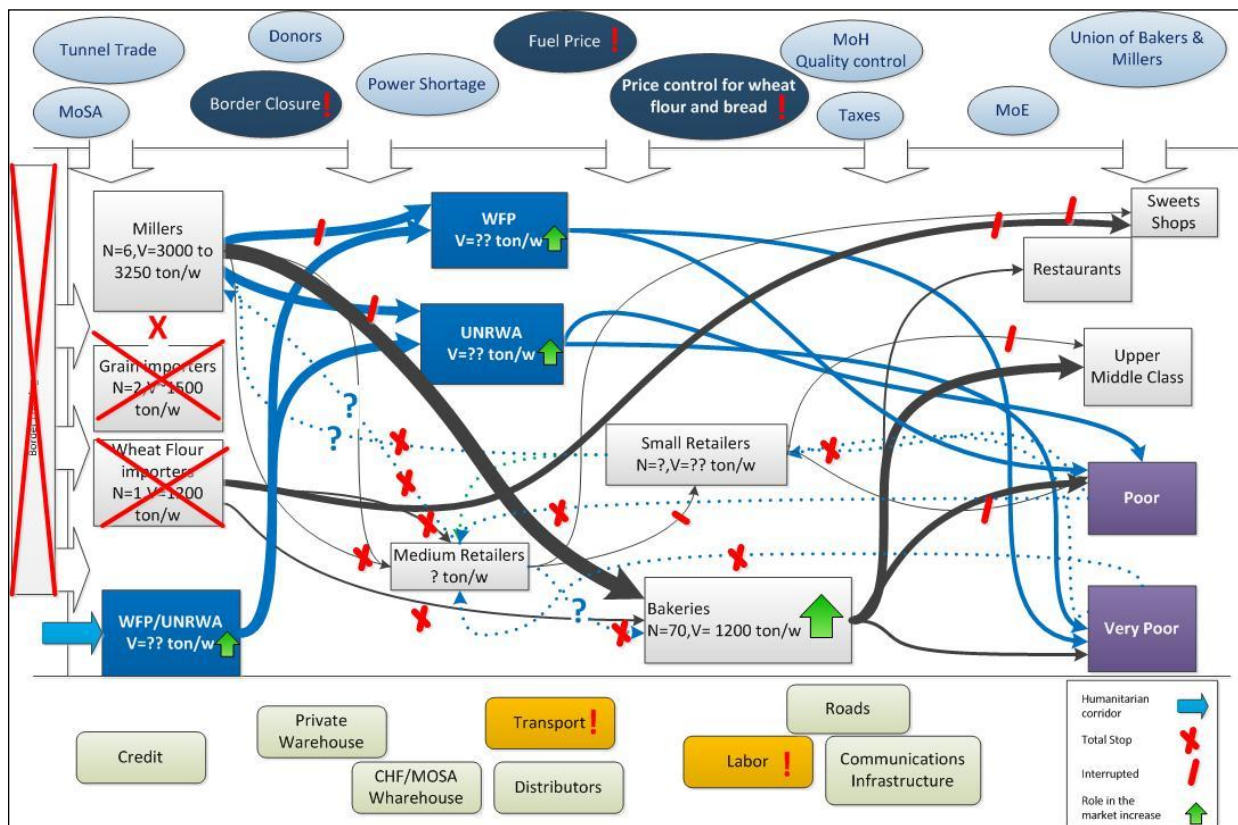
For the purpose of this EMMA, October 2013 was taken as the baseline year and the two hypothetical but possible scenarios were chosen for the final analysis. The EMMA maps for both these scenarios are presented in the following sections.

Answers to the Key Analytical Questions:

a) In case of total closure (of border with Israel) of two weeks, how long will the stocks of wheat grain/flour last?

In case of total closure of two weeks, the market will not receive the supply of wheat grain through imports from Israel. This will mean that the importers will not be able to supply to the millers. This is likely to affect the functioning of the market chain. The following map shows the possible impact of the border closure on the wheat flour market system in Gaza.

Figure 2: Anticipated changes to the baseline market map in case of total closure of two weeks



The situation of a total closure is most likely to occur in case of war or war-like situation with Israel. For this reason, the events in the recent 7-10 days war in November 2012 were used to plot the impact on the market map and analyse the capacity of the market to meet the gap in needs. This key analytical question is also time sensitive given that the stock capacity in the country varies based on the supply of imports from Israel. To answer the question, the EMMA team looked at the stock situation in October'13 to arrive at an answer for the month of November'13.

Discussion with key informants highlight that in times of crisis, the millers continue to produce flour at the normal capacity until their stock of wheat grain lasts. MoNE plays a crucial role during crisis periods by assessing the total stock with millers and instructing them to supply wheat flour to selected bakeries

only. This is done to ensure that the supply of the staple food i.e bread is not interrupted in the market. During this period, millers are barred from selling wheat flour in the open market so the medium size retailers and small retailers do not receive any supplies through the chain. The bakeries are selected by MoNE based on their production capacity and spread/outreach in different parts of Gaza. In 2012, this was managed well by MoNE and there was no reported shortage of flour or bread in the Strip.

In case of total closure now i.e October 2013, MoNE is likely to play the same role in ensuring the availability of bread at affordable rates during crisis. This will mean that the available stocks with the millers and the UN agencies will determine whether the markets will be able to meet the demand for two weeks. Also, given that bread is a commodity consumed by all wealth groups and the non-poor have financial resources' constraints to access bread easily in the open market, it is important to answer this question for the entire population of Gaza in order to estimate whether the supply will be enough to meet the needs of the poor and very poor households.

Based on the Kilocalorie needs the following amounts are needed to cover the entire population of Gaza for 1 month:

Needs threshold	Quantity needed for entire population of Gaza
300 gms wheat flour/person/day	15300 Ton/mth OR 3825 Ton/week
320 gms wheat flour/person/day	16320 Ton/mth OR 4080 Ton/week

The stock in Gaza at the time of field work for this EMMA (23rd- 28thth October 2013) was

WFP : 2000 Ton
 UNRWA : 1260 Ton
 Class A flour : 60 Ton
 Flour Mills : 10080 Ton (stored in grain equivalent i.e 14000 Ton and produced at current milling capacity)

TOTAL : 13400 T

The total wheat flour needed for 2 weeks for the entire population of Gaza is:

3825 Ton/week x 2 weeks = 7650 Ton

4080 Ton/week x 2 weeks = 8160 Ton

Given the amount available in the market i.e 13400 Ton, it can be concluded that in case of a total closure in October'13, the market would have presumably² met the needs of the entire population of Gaza for two weeks.

In fact, there was enough stock in Gaza to meet the needs of the entire population for nearly a month i.e four weeks. If that were the case, a small deficit of 1,900Ton (based on RDI³) and 2,920 Ton (based on local estimates of consumption) would be observed if the market were to cover the needs for one full month. However, as the humanitarian corridor is only partially affected during complete closure of the border, it can be assumed that the UN agencies would be able to maintain the coverage of their ongoing programs while looking to partially cover additional needs. Depending on the possibility to cover increased needs by humanitarian actors (this would depend on the existing stocks within the Palestine operations' pipeline/procurement plans), the private sector would have to cover the remaining deficits (for the better-off population groups) and this would depend on the possibility of the market to function regularly, i.e. on the possibility to enter required quantities from the official crossing point.

² This assumption depends form i) the capacity of MoNE to play the same role in stabilizing prices and ii) the possibility for UN agencies to continue purchase the locally procured wheat flour that is part of the 'existing stocks' at any given moment.

³ RDI- Reference or recommended daily intake.

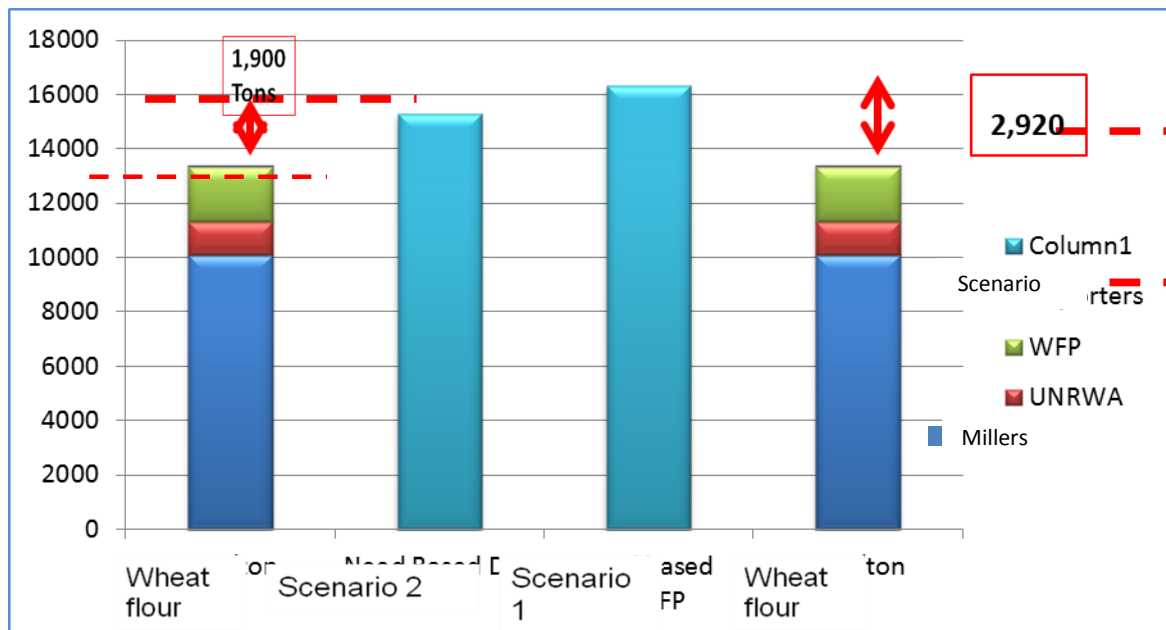
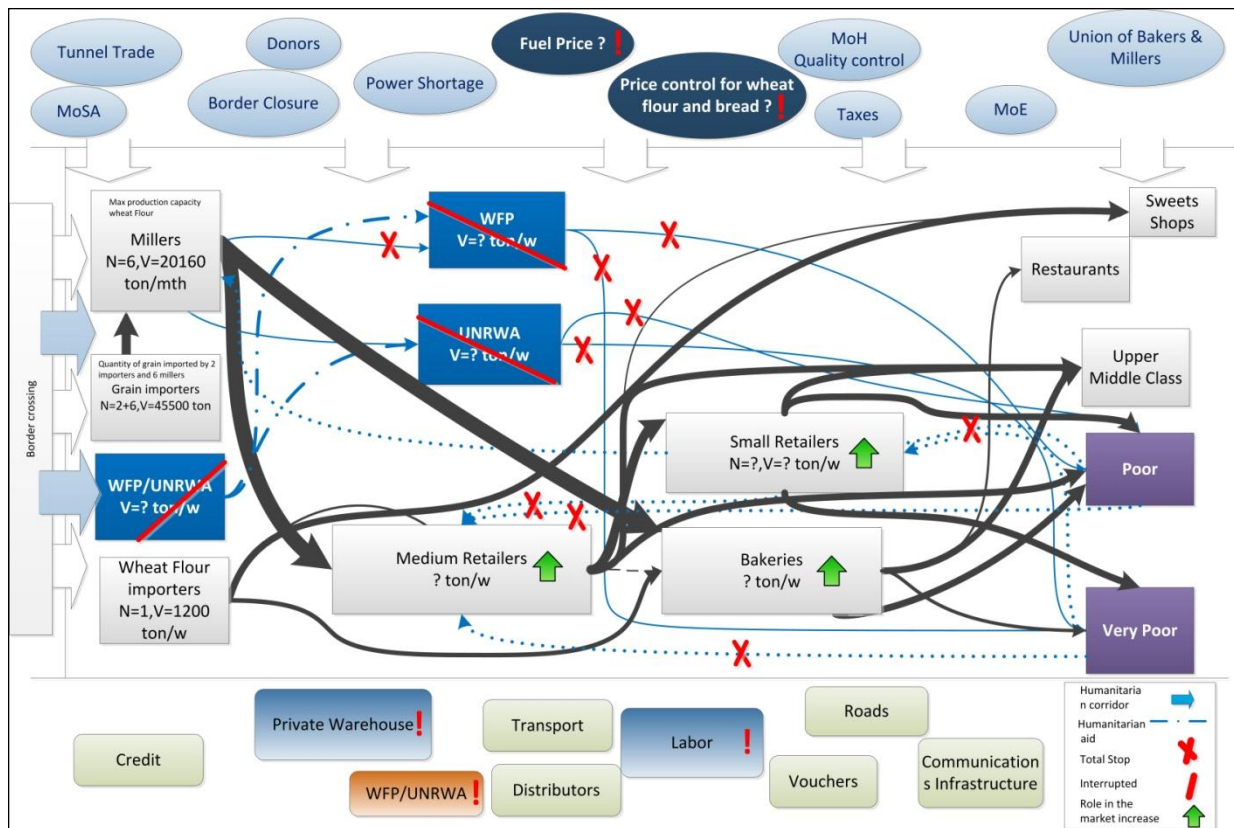


Figure 2: Gap in needs for entire population of Gaza for 1 month

- b) **In case of an interruption of the humanitarian distribution of wheat flour (as a part of general food distribution), would the market be able to fill the gap in importing the required quantities to match the overall Gaza needs?**

To answer this key analytical question, the team looked at the scenario wherein the UN agencies do not import or purchase wheat flour locally. Figure 4 illustrates the changes in the baseline situation based on this scenario.

Figure 4: Emergency map on UN agencies withdrawal of wheat flour from GFD



The UN agencies currently import approximately a total of 25,480 Ton of wheat flour/year. The largest amount of humanitarian wheat flour is purchased locally from the Gaza market (over 70,000 MT/year according to data from Figure 1). If the UN agencies were to stop distributing wheat flour as a part of their general food distribution the gap created through zero imports will be approximately 2,123 Ton/month.

Interviews with importers highlighted that they have the financial capacity to import large amounts on a regular basis as well as in-country cumulative storage capacity to store 45,500 Ton of wheat grain. The millers currently produce 10,080 Ton of wheat flour each month. This is based on the staff working for one shift of eight hours. The millers were confident that this capacity could be doubled to produce 20160 Ton of wheat flour/month. The amount of flour produced if the mill runs on two shifts/day (i.e 20,160 Ton) is more than what is needed for the entire population of Gaza each month. The private sector would therefore have the capacity to fill the relatively small “direct imports” gap of 2,123 MT/month created by UN agencies interrupting their imports into Gaza. However, this would represent a very small portion of the current humanitarian wheat flour distributed in Gaza and therefore only a marginal aspect within the overall impact of interrupting humanitarian food aid (wheat flour). If the interruption to humanitarian wheat flour distribution were to be complete, then the actual impact on local markets and overall economy would be much more complex than just the fact of filling the “direct import gaps”. In fact, the current humanitarian wheat flour distribution is already part of the local “demand” and represents an important incentive and a stable source of income for local millers / traders.

There are two critical issues that need to be considered in this respect and that need additional in-depth analysis in order to complete the wheat flour market assessment: the price level adaptation in case of increase in the private demand and the purchasing power of the food aid beneficiaries.

- 1) While the EMMA concluded that the market system has adequate capacity to absorb reduced humanitarian imports, the EMMA team also considered access of the target group to the wheat flour in the market. The team were conscious that availability of wheat flour does not guarantee access to this flour at affordable rates. In an open market system where six millers produce the flour for the entire population, there are high chances of price increase. The MoNE plays a crucial role in this context to fix price of wheat flour and bread and has been able to play this role in the past, due to relatively small changes in the overall demand/supply of commodities. In case of a massive shift of the demand to the private sector (1.1 million people moving from food aid to small traders), it is likely that due to a lack to competition, the prices will certainly rise⁴, and the volatility of the price of wheat flour will mainly depend on the capacity of MoNE to continue playing its role in fixing prices and monitoring them (with an increase in scale of the required measures, there might be budgetary constraints that would limit MoNE capacity to control price levels)
- 2) While the question addressed by the current EMMA exercise was about capacity of private sector to absorb the interruption of humanitarian wheat flour imports, the issue of access of poor and very poor households to wheat flour cannot be ignored. People's purchasing power is extremely low in Gaza and the high level of unemployment makes it extremely difficult for poor and very poor households to survive without any external assistance. In case of an interruption of the humanitarian food aid, under the current economic conditions among the beneficiary population (and generally in Gaza), it seems highly unlikely that the current humanitarian recipients will be able to purchase the same quantities (if at all) in the private market system. In other words, it is highly unlikely that the suppliers (traders/millers) would find sufficient "buyers"/demand in the market, consequently losing the necessary incentive to import/produce the required additional quantities.

Within the current socioeconomic context, UN agencies therefore play a crucial role in:

- Ensuring that poor and food insecure population in Gaza Strip have access to their minimum food requirements (taking into account their current lack of purchasing power and independently from local supply and prices volatility);
- Ensuring supply in times of crisis by maintaining the humanitarian corridor; and
- Indirectly contributing to food price control by increasing supply in the local market through provision of imported wheat flour (marginally reducing the monopoly of millers).

Given the precarious situation in Gaza, it is important to maintain the humanitarian corridor; however, key informant interviews revealed that this corridor does not depend on wheat flour imports. There is a range of humanitarian food and non-food items that the UN agencies import into Gaza and the corridor can be maintained by continuing imports of other food and non-food items. Therefore, the humanitarian corridor could remain opened independently from humanitarian wheat flour imports. However, it has to be highlighted that the interruption of the wheat flour (or any other commodities) imports for humanitarian purposes would make the reactivation of the corridor for the specific commodity more problematic in case of sudden onset acute crises.

The UN agencies role in price control is not a direct intervention but this role cannot be ignored. This question was considered by the EMMA team while working on response options. The other but related issue that was considered by the EMMA team at the response analysis stage was the financial capacity of the poor and very poor people to buy wheat flour from the open market.

⁴ As it was not a part of the exercise to estimate changes in price of wheat flour, the EMMA team did not analyse this issue further. However in order to complete the wheat flour market /value chain assessment, a in-depth analysis on price changes need to be included to capture the impact of increased demand and lack of purchasing power..

7. Response Analysis and Recommendations:

The response analysis was done for the 2nd scenario i.e. if UN agencies cease to import/distribute wheat flour as a part of general food distribution. The following can be inferred from the situation analysis, market analysis and gap analysis of the wheat flour market system in Gaza:

- The market has the capacity to produce/import enough wheat flour to meet the needs of 100% of the population on a regular basis
- The price of wheat flour would increase and the capacity of MoNE to maintain the role on price control would determine the extent of the increase/volatility in the market.
- Monopoly trade could increase volatility of prices and informal trade in the long run.
- High unemployment rates result in low purchasing power in the immediate future and would not be significantly affected by changes in the wheat flour market mechanisms (even doubling of shifts at milling stage, increase in trading activities and job opportunities created by the wheat flour private market would not off-set the massive unemployment numbers affecting Gaza population).

The Response analysis therefore focuses on options to:

- Increase immediate purchasing power of the poor and very poor households; and
- Reduce and/or stabilise prices.

Figure 5 : Response and Recommendation analysis

Response activities	Key risks and assumptions	Timing issues	Likely effect on market system and target groups
1. Increased purchasing power			
Explore employment opportunities/ businesses in different sectors: services, construction, jobs, private sector development Indirect Response	Until the blockade remains in place, large- scale employment and income earning opportunities will remain limited for people in Gaza Closed economy poses challenges for the development of private sector, construction and jobs. Even in the case of an end to the blockade employment will not be resolved	This intervention will require long-term advocacy efforts to continue lobbying for the end of the blockade <u>Estimated time: approx. 5 to 10 year</u>	Increased income for the target population and other wealth groups Regenerate the market allowing for increased circulation of goods and cash, thereby enabling the local economy to revive
Cash and/ or value based vouchers to target group Direct intervention	People are used to around 60 years of food aid thus any transition away from in-kind support will have to	Immediate but very gradually	It would provide target groups with cash/voucher to cover the gaps in their food consumption created by the interruption of humanitarian wheat flour distribution.

	<p>be done gradually</p> <p>Shopkeepers may want to reduce debt levels via the vouchers, therefore the value of vouchers will have to calibrate this</p> <p>As mitigation measure we should consider factoring in increasing monitoring</p> <p>Risk of creating inflationary impact on local economy.</p>		
2. Price Control of wheat flour			
<p>Introducing subsidies for bread</p> <p>Indirect intervention</p>	<p>Local authorities not in favour of subsidies</p> <p>Creates dependency if done at large scale and will largely benefit the middle and better offs because they are the main consumers of bread</p> <p>Capacity/Willingness of government/donors to provide the required budgetary support for the subsidies might be limited</p>	<p>Medium to long-term and immediate search for alternatives</p>	<p>Bread will be available at affordable rates but that can also mean that more bread will be consumed by the poor and this may negatively affect their dietary diversity/quality</p>
<p>Lifting import tax on wheat or flour 17.5%</p> <p>Indirect intervention</p>	<p>Very low chances of agreement by Israel and the PA</p>	<p>Long-term</p>	<p>Increase in the availability of wheat flour in Gaza markets</p> <p>Availability of cheaper flour in the market</p>
<p>Strategic grain reserves by non-private actors</p> <p>Indirect intervention</p>	<p>Funding challenges will remain</p> <p>Serious deliberations are needed on management and control of the grain reserve</p>	<p>Immediate to medium term</p>	<p>Could play a strategic role in controlling the prices in open market system and control volatility of wheat flour prices induced by monopoly of millers, to the extent that stocks are sufficient to stabilize variations in demand.</p>

			Provide contingency/ humanitarian stock inside country and increase preparedness for emergency situations.
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Among a range of options discussed above the following response options are recommended by the EMMA team for further exploration:

a) **Increase purchasing power of household through the introduction of cash and/or vouchers for wheat flour.**

Given fears associated with cash grants and also based on the fact that poor households have a huge debt burden, the chances of unconditional cash grants being successful on their own are slim. It would be good to combine cash assistance with other forms of support. Value based vouchers can serve the purpose of giving some flexibility to beneficiaries while ensuring that all the cash does not go towards debt repayment at the cost of food. A combination of cash transfers (cash for work or cash grant) and value based vouchers might be an option worth exploring as well. A further analysis will be required to determine the value of the cash and/ or voucher transfer and how it will be delivered to people.

The most critical aspect to be considered would be the impact of an increase in the demand on the local markets and the consequences on the food price levels. This requires further investigation and an in-depth price analysis in the Gaza context, in order to understand the price implications of a large increase in the demand. Current food aid beneficiaries would be given cash/vouchers to meet their current food needs (partially covered by food aid), meaning an additional 1.1 million people on the market with a massive inflationary pressure due to the fact that they would be provided with cash to cover their food needs.

Additionally, the design of a cash/voucher programme must consider introducing the change gradually to avoid fear and anxiety among a population that is accustomed to General Food Distribution for the past 60 years. It may be useful to explore the possibility of providing business grants to small retailers to increase their capacity, create employment and rejuvenate the local market for food items.

b) **Control the price of wheat flour through the creation of strategic grain reserve in Gaza.**

This reserve would serve as contingency stock and can be utilized in times of crisis, but more importantly, it can serve the function of price stabilization. Many country governments use grain reserves to control prices by releasing grain from the reserve when markets become too volatile.

The two options presented above have a great potential to support humanitarian preparedness and action in the short term. Moreover, in the context of Gaza where non state actors provide the much needed social assistance to a large population of Gaza, these response options can help in building a coordinated social protection framework that can address acute and chronic food security of the target group.

Annex: 1 Key informants

Grain Importers (2),

Wheat Flour Importer (1)

Millers (who also import) (6)

Bakeries (3)

Medium Retailers (2)

Small Retailers (3)

Households 9 :(Poor 3, very poor 3, poor but non-beneficiaries 3)

Union of Bakery Owners

Ministry of Economy - Deputy Minister.

Ministry of Social Affairs – General Director of Governorates

UNRWA- Head of Logistics and the Emergency Support Officer

WFP- Logistics Officer, Programme Officer and Head of Mission in Gaza

Union of Fuel Stations' Owners

Annex 2: Import of wheat grain into Gaza

Private importers of Wheat Grain (who do not mill)	No.2 Current import volume : 1500 ton/month
Private importers of Wheat Grain (who are also Millers)	No.6 Current import volume :12500 ton/month
Private importer of Wheat Flour (Class A)	No.1 Current import volume: 4000 ton/month (60% of this goes towards confectionary items i.e sweets, pastries etc.)
Wheat flour imports by UN agencies (WFP and UNRWA)	No. 2 Current import volumes WFP: 2100 NRWA : 12000 Ton in 2012

Annex 3: Data set from interviews

Millers											
	Name	Where he buys from	Who does he sell to	Volume of purchase grain/transaction/ton/week	Volume of sale WF/transaction to different actors/Ton/week	What price (buying)/NIS/ton	over head cost/NIS/ton	Price (selling)/NIS/ton	Margin	Normal stock/ton/month/grain	Storage Capacity/grain/ton
1	Al Huda- Ajour	Israel& Grains impoters	Retailers & Bakeries	250 -300	180 to 200	1100 to 1150	250 to 350	1900 to 2000 NIS	550 to 500	1200	3000
2	Al Falasteenya	directly from Israeli	Retailers & Bakeries	2000 -2200	900 to 1000	1100 to 1150	250 to 350	1900 to 2000 NIS	550 to 500	8000	18000
3	Al Salam	directly from Israeli	Retailers & Bakeries	1500- 2000	800 to 850	1100 to 1150	250 to 350	1900 to 2000 NIS	550 to 500	5000	7000
4	Al Faiha	Israel& Grains impoters	Retailers & Bakeries	200 - 225	150 to 150	1100 to 1150	250 to 350	1900 to 2000 NIS	550 to 500	800	2500
5	Al Eman	Israel& Grains impoters	Retailers & Bakeries	1500 - 1600	700 to 800	1100 to 1150	250 to 350	1900 to 2000 NIS	550 to 500	3000	5000
6	Hamada- Al Kobra	directly from Israeli	Retailers & Bakeries	400- 500	200 to 250	1100 to 1150	250 to 350	1900 to 2000 NIS	550 to 500	1500	10000
	Total& Avar			6000 to 7000	3000 to 3250	1100 to 1150	250 to 350	1900 to 2000 NIS	550 to 500	19500	45500

Millers											
	Name	Where he buys from	Who does he sell to	Volume of purchase grain/transaction/ton/week	Volume of sale WF/transaction to different actors/Ton/week	What price (buying)/NIS/ton	over head cost/NIS/ton	Price (selling)/NIS/ton	Margin	Normal stock/ton/month/grain	Storage Capacity/grain/ton
1	Al Huda- Ajour	Israel& Grains impoters	Retailers & Bakeries	250 -300	180 to 200	1100 to 1150	250 to 350	1900 to 2000 NIS	550 to 500	1200	3000
2	Al Falasteenya	directly from Israeli	Retailers & Bakeries	2000 -2200	900 to 1000	1100 to 1150	250 to 350	1900 to 2000 NIS	550 to 500	8000	18000
3	Al Salam	directly from Israeli	Retailers & Bakeries	1500- 2000	800 to 850	1100 to 1150	250 to 350	1900 to 2000 NIS	550 to 500	5000	7000
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5	Al Eman	Israel& Grains impoters	Retailers & Bakeries	1500 - 1600	700 to 800	1100 to 1150	250 to 350	1900 to 2000 NIS	550 to 500	3000	5000
6	Hamada- Al Kobra	directly from Israeli	Retailers & Bakeries	400- 500	200 to 250	1100 to 1150	250 to 350	1900 to 2000 NIS	550 to 500	1500	10000
	Total& Avar			6000 to 7000	3000 to 3250	1100 to 1150	250 to 350	1900 to 2000 NIS	550 to 500	19500	45500

Retailer										
	Name	Where he buys from	Who does he sell to	Volume of purchase/transaction/ton/month	Volume of sale/transaction to different actors/ton/month	What price (buying)/NIS/ton	Price (selling)/NIS/ton	Margin /ton/NIS	Normal stock/ton	Storage Capacity/ton
1	one in khanyounis	Beneficiaries of UNRWA and WFP	individuals,retailers	30	30	1860 to 1940	1900 to 2000	40 to 60	0	0
2	Raffiq al Laqta	Local millers	individuals	8	7.5	1860 to 1940	1900 to 2000	40 to 60	0.5	3
3	Fayeq al Refey	Beneficiaries of UNRWA and WFP	individuals	12	12	1500 to 1640	1600 to 1700	60 to 100	0	0

	Bakeries										
	Name	Where he buys from	Who does he sell to	Volume of purchase/transaction/weekly	Volume of sale/bread/transaction to different actors	What price (buying)/NIS/50 kg bag	over head cost/NIS/50 kg bag	Price (selling)/NIS	Margin /NIS/50 kg bag	Normal stock/ton/month	Storage Capacity/ton
1	Al shanty	Different millers according to the quality	restaurants and individuals	25 ton	125 ton weekly	local : 95 to 100: 70% Israel : 117 to 120:30%	15 to 20	7 NIS (bread sack 2.7kg)	37 to 29	25	25
2	Al khouly	Palestine Mills and Es Salaam mills/sometimes from	individual consumers/hh	12.5 ton	60 ton weekly	local : 95 to 100: 70% Israel : 117 to 120:30%	15 to 20	7 NIS (bread sack 2.7kg)	37to 29	5	5
3	Al Aelat	Palestine Mills and Es Salaam mills/sometimes from flour's importers	Jordanian hospital, individual consumers	35 ton	175 ton weekly	local : 95 to 100: 60% Israel : 117 to 120:40%	15 to 20	7 NIS (bread sack 2.7kg)	35 to 26	30	30
4	Average for all bakeries according to the obtained data from	Palestine Millers and flour's importers	restaurants and individuals	18 ton	22 ton weekly	local : 95 to 100: 70% Israel : 117 to 120:30%	15 to 20	7 NIS (bread sack 2.7kg)	37to 29	15	15

	Households							
	Name	Where they buy/get flour from	Where do they sell	Volume of purchase/transaction/kg/month	Volume of sale/transaction to different actors/kg/month	What price (buying)/kg/NIS	Price (selling)	Normal stock
1	Hussein Al Samouni	Small retailers	NA	100 kg	NA	1.7 to 1.9	NA	NA
2	Om Fayez Al Bayouk	Small retailers	NA	150 kg	NA	2 to 2.5	NA	NA
3	Khaled Al Farra	Bakery (they buy bread)	NA	43 kg of bread	NA	2.6 for 1 kg bread	NA	NA
4	Rezek Qasas	Small retailers	Retailer near distribution center	60 Kg	30 kg	1.6 to 1.8	43 to 48	NA
5	Majed Dalloul	NA-	NA	NA	NA	NA	NA	25 Kg
6	Al Barrawi Murtaja	Small retailers	NA	50 Kg	NA	2 to 2.2	NA	NA
7	Hatem Musabeh	NA	NA	25 kg	NA	1.5 to 1.8	NA	NA
8	Hamza Zeno	Bakery (they buy bread)	NA	43 Kg of bread	NA	2.6 for 1 kg bread	NA	NA
9	Hamada Ashour	Small retailers	NA	50 Kg	NA	1.9 to 2	NA	NA

Annex 4: Guiding questions for interviews

Retailers

1. Where & from whom do you buy wheat flour?
2. How is it delivered? You bring it or is it delivered to your shop?
3. Are the prices of buying stable or do they keep changing? If changing, what has been the trend in the past two years? (if not in absolute figure then a percentage) What have been the triggers?
4. What is the volume that you typically buy? How often do you replenish your stock i.e monthly/weekly?
5. What is the maximum capacity of your purchase? (expandability)
6. Do you have storage for wheat flour? What is the minimum stock that you typically have in your store/shop?
7. What is your maximum capacity to store flour?
8. Is there a limit/quota on prices and on volume of flour that you can sell?
9. What are the quality control measures that you have to follow? (MoH)
10. Who are your customers? i.e small retailers/shop owners, households, bakeries, WFP/UNRWA etc.
11. How often do they buy and typically what quantities?
12. What price do you sell the flour at? What has been the trend in prices in the past 2 years?
13. Do your customers pay for the flour immediately? If not how long do they take to pay for the flour?
14. How much money is typically owed by your customers at any point of time?
15. What are the extra costs that you have to bear to run the business eg. Labour, taxes, transport etc.?
16. What is the typical margin/50 kg bag (or Kg) on wheat flour?
17. What do you think of the quality of the flour provided through food aid?
18. What rate is it bought and sold by retailers?
19. What is the profile of people who buy this flour in the open market? How much flour do they typically buy at a time?
20. Why do people sell this flour? How much quantity do they sell at a time?
21. How has the tunnel closure affected your business? (prices/volume)
22. If people are given cash instead of food aid, how will this affect your business?
23. If there is a total closure for two weeks, how long will your stock last?
24. How many staff/laborers do you have? Any women?
25. Do you know the number of small/medium retailers of wheat flour in your area (north, middle and south Gaza)

Bakeries

26. Where & from whom do you buy wheat flour?
27. How is it delivered? You bring it or is it delivered to your bakery?
28. Are the prices of buying stable or do they keep changing? If changing, what has been the trend in the past two years? (if not in absolute figure then a percentage) What have been the triggers?
29. What is the volume that you typically buy? How often do you replenish your stock i.e monthly/weekly/day?
30. What is the maximum capacity of your purchase? (expandability)
31. Do you have storage for wheat flour? What is the minimum stock that you typically have in your store/shop?
32. What is your maximum capacity to store flour?
33. Is there a limit/quota on prices and on volume of flour that you can buy for making bread?
34. What are the quality control measures that you have to follow? (MoH)
35. How much bread is produced by your bakery per day? How much is sold/day?
36. Who are your customers? i.e. small retailers, restaurant, households etc.
37. How often do they buy and typically what quantities?
38. How much of the total flour purchased (%) is used for making bread? What price do you sell the bread for?
39. Do your customers pay for the bread immediately? If not how long do they take to pay for the flour?
40. How much money is typically owed by your customers at any point of time?
41. What are the extra costs that you have to bear to run the business eg. Labour, fuel, taxes, transport etc.?
42. What is the typical margin in your business (get a range)?
43. What do you think of the quality of the flour provided through food aid?
44. What rate is it bought and sold by retailers?
45. What is the profile of people who buy this flour in the open market? How much flour do they typically buy at a time?
46. How has the tunnel closure affected your business? (prices/volume)
47. If people are given cash instead of food aid, how will this affect your business?
48. If there is a total closure for two weeks, how long will your stock last?
49. Are you among the list of bakers who are asked to make bread during crisis from the Min of national economy? Where do you get the flour in times of crisis?
50. How many staff/labourers do you have? Any women?

Fuel Merchants

51. How many fuel merchants are there in Gaza (formal and informal)?
52. Where do they import the fuel from? and at what price?

53. How often do they import the fuel?
54. What is their maximum storage capacity?
55. What is the normal stock stored by them on an average?
56. Who do they sell to and in what quantities?
57. What is the sale price?
58. Is there a ceiling on the sale price?
59. What is the impact of the tunnel closure on their business?
60. Do they know where do Bakeries and Millers buy the fuel from?
61. What proportion (%) of the fuel in Gaza is purchased by bakeries and millers?
62. In case of total closure, how many days will they be able to supply the fuel?
63. If WFP/UNRWA stops distributing imported flour, how will their business be affected?

Emergency Market Mapping & Analysis

Households questionnaire

Name of key informant:	Interviewer :
Place :	Contact number :
Date :	

1. How many members in the HH?
2. How much wheat flour do you consume per month?
3. Do you receive any cash assistance?
4. Do you receive wheat flour from UNRWA/WFP aid?
5. How much flour do you get ?(monthly / per 2 month/ quarter)
6. How do you transport the goods from the UNRWA/WFP warehouse?
7. How much do you pay for transportation per trip?
8. Do you pay in cash? Or in kind? if in kind , what and how much?
9. Is the distributed quantity of flour enough for meeting HH needs for the entire month/quarter?
10. If not where do you buy the remaining flour from? How far is it from your house?
11. What quantity of flour do you buy per trip (every time you visit the shop)?
12. What proportion/percentage of your household flour need does the purchased flour represent?
13. What is the price of the wheat flour when you buy? Is there a seasonal variation in the price of flour in the market? If so, which months is it high and low? And why?
14. What are your sources of income? Is this affected by seasonality? How is each source of income affected during a crisis?
15. Do you sometimes buy WFP/UNRWA flour from the market? at what price?
16. Do you know why people sell the WFP/UNRWA flour? If yes, how much flour they sell at a time and at what price?
17. Who buys this flour from them? And why?
18. What is your opinion on replacing food aid with cash aid?
19. Did the November war affect your ability to buy flour from the market? If yes, how and how did you cope with it? Did you buy flour or bread? At what price?
20. Was bread easily available in your area?

Women only

21. How does any crisis (Nov war) impact on women and girls income, access to markets and consumption patterns?
22. In normal times, do you prefer to make bread at home or to buy it from a bakery? If you prefer buying bread why? If not, why?
23. What will be a better option for your household – (i) food aid; (ii) equivalent amount in cash; or (iii) 50% cash and 50% food aid?

Importers (Grain and Flour)

1. From where do you buy the grain/ flour from?
2. Are the prices of buying stable or changing?
3. If changing, how much? (if not in absolute figure then a percentage)
4. What are the triggers?
5. What is the volume that you typically buy? (How often, monthly/weekly)?

6. What is the maximum capacity of their import? (expandability)
7. What is the maximum capacity to store? How much stocks do their store typically/on average?
8. What is the daily transaction in volume?
9. How long is the process of import?
10. What are the rules/laws for import? Is there a limit/quota on price and volume?
11. Do they deliver to the wholesalers themselves? How is it transferred?
12. Are you using your warehouses? Others? If so, Which?
13. Are there any additional costs involved other than Importing? (labour, warehouses, branding, packaging, taxes)
14. What is the selling price? (MT)
15. What are the challenges/constraints that they face at the moment?
16. Any constraints facing possible expansion?
17. Do you think you (All importers collectively) can meet the gap if Food Aid stops?
18. If aid is converted to cash instead of food, will the market meet the demand?
19. What is effect of closure of tunnels on your business? (prices/volumes)
20. How many clients? Who are they?
21. If there is a total closure for two weeks, will you be able to meet the demand? (as all importers collectively)?
22. How many labourers do you have? Any women?
23. Do you have any predictions of future crisis?

Ministry of National Economy

1. How many Importers and how much do they normally import?
2. How many Importers cum millers and their normal capacity to import and mill?
3. How many millers only and their capacity to mill?
4. What have been the trends in prices of flour for 2 years with a monthly breakdown?
5. What have been the trends in flour production and availability in Gaza (excluding WFP and UNRWA)
6. What was the volume of trade of flour through the tunnels before their closure?
7. How much of it still comes in through the tunnels?
8. What has been the impact on the national economy because of tunnel closure?
9. How many bakeries and their production capacities in Gaza?
10. What is the trend in the price of bread for the past 2 years?
11. What is the normal availability of grain and flour in Gaza at any given point of time?
12. How much fuel is imported through Israel and at what rates?
13. How many fuel merchants exist in Gaza and their storage during normal times?
14. How much (percentage) fuel comes through Egypt formally and informally?
15. What is the rate of this fuel?
16. Does the government provide fuel at affordable rates to essential services?
17. What is the amount of fuel needed in the country for the flour/bread production to meet the needs of people for 2 weeks?
18. What do they do (flour, bread and fuel) during times of crisis to ensure that people get flour/bread at affordable rates?
19. What do they do in normal times to ensure that flour/bread is accessible to people?
20. How will the flour market be affected if WFP & UNRWA stop providing food aid and give cash or voucher instead of equivalent amounts?

Ministry of Social Affairs

1. Do you do GFD? If so, who funds the purchase?
2. Where is the grain/flour purchased from and at what rates?
3. Do you have warehouse/s? What is the total capacity of this warehouse/s?
4. What is the quantity of the grain/flour stored in these warehouse/s on an average?
5. Who are the beneficiaries of the GFD? What criteria was used to identify them and by who
6. How often does the distribution happen?
7. In case of total closure, how many days ration will they have to meet the needs of their GFD beneficiaries?
8. What is the likely impact on the flour market if WFP/UNRWA switch from food aid to CTP?
9. How many beneficiaries of CTP? And what is the criteria used for choosing them?
10. What is the amount that is transferred per household/beneficiary? How often?
11. What is the rationale for setting the value of transfer?
12. What proportion of household income would this be?
13. What is the objective of this CTP? And what is the length of this CTP?
14. Is this funded through government resources or through donor? If donor funded, who are the donor/s and their proportion of funding? How long is this funding for?
15. How is the cash delivered? And how often i.e weekly/monthly/quarterly?
16. How do the beneficiaries spend/use the money? Any monitoring data they have.
17. Are there any other ancillary support programmes for the beneficiaries to help them in graduating out of poverty?

18. What is the mechanism to update and manage the data – inclusion of new beneficiaries and removal of people who have moved out of poverty or dead.

UNRWA/WFP

1. What is the total number of beneficiaries for general food distribution?
2. How many CTP/Voucher beneficiaries? Do they also receive GFD? Rationale for this number for CTP/voucher?
3. Are there other programmes that involve distribution/consumption of flour? Eg. School feeding etc.
4. What is the total gap in needs per beneficiary of GFD i.e what percentage of daily calorific needs does UNRWA meet?
5. How much flour does UNRWA/WFP need to meet the needs of all its GFD beneficiaries?
6. Where does UNRWA/WFP procure the flour for distribution?
7. How much of this is imported and how much is purchased locally?
8. Is there a limit/ceiling to the amount of flour/grain that UNRWA/WFP can bring into Gaza?
9. If purchased locally, who do they buy from (millers/retailers & their names); how much do they buy; how often they buy and what rate/price they buy from?
10. What are the trends in availability and prices of wheat flour in the Gaza market and import market for the past 2 years (monthly breakdown)?
11. What is the amount of flour imported by UNRWA/WFP per week/month/quarter?
12. What rate do you buy the imported flour from?
13. Where is the flour stored? And for how long?
14. How often is the distribution done? Monthly/bi-monthly/quarterly?
15. What is the farthest distance that a beneficiary has to travel for the distribution?
16. Who pays for the transport? How are these payments made?
17. Do they distribute fuel as well? If so, how much per beneficiary?
18. Where do they procure fuel from?
19. Trends in price and availability of fuel for the past 2 years?
20. In times of crisis does UNRWA/WFP increase its procurement? If so, by how much was it increased in 2008 and in November 2012?
21. What are the potential implications on the market of WFP/UNRWA switching from GFD to CTP?
22. What are the possible implications of complete closure of 2 weeks on the local markets if (i) WFP/UNRWA stop GFD; and (ii) if they continue?

Annex 5: Names of key informants

- Grain Importers (2),
Ammar Yassin
Hatem Yassin
- Wheat Flour Importer (1)
Esam Abu Taha
- Millers (who also import) (6)
Al Huda- Ajour
Al Falasteenya
Al Salam
Al Faiha
Al Eman
Hamada- Al Kobra
- Bakeries (3)
Al Shanty
Al Khoully
Al A'elat
- Medium Retailers (2)
Raffiq al Laqta
Mohammed Qadora
- Small Retailers (2)
Fayeq al Refey
Hany El Madhon
- Households 9: (Poor 3, very poor 3, poor but non-beneficiaries 3)

Hussein Al Samouni	Rezek Qasas	Hatem Musabeh
Fayez Al Bayouk	Majed Dalloul	Hamza Zeno
Khaled Al Farra	Al Barrawi Murtaja	Hamada Ashour
- Union of Bakery Owners: Abd Al Naser Al Agramy (Abu Jamal)
- Ministry of Economy: Deputy Minister Mr. Hatem Oweda
- Ministry of Social Affairs: General Director of Governorates: Mr. Ryad Bitar
- UNRWA: Head of Logistics and the Emergency Support Officer: Alexander Balabai and Damien Vaquier
- WFP: Logistics Officer, Programme Officer and Head of Mission in Gaza: Hafez Thabit, Rula Khalaf and Raoul Balleto
- Union of Fuel Stations' Owners: Raffiq El Khozondar

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Humanitarian Aid and Civil Protection

“This document covers humanitarian aid activities implemented with the financial assistance of the European Union. The views expressed herein should not be taken, in any way, to reflect the official opinion of the European Union, and the European Commission is not responsible for any use that may be made of the information it contains.”



This report, result of the Wheat EMMA market mapping exercise and analysis was written by Oxfam staff, supported by members of participating international organisations WFP, FAO, ACF, PU, local partners, MA'AN, YEC, East Gaza Association and local stakeholders. Oxfam acknowledges the assistance of all participants for the success of the exercise and final analysis.

This is part of a series of emergency market mapping assessments, conducted by multi-agency teams to help inform and shape better programming by humanitarian and development actors in the Gaza strip. The information in this publication is to the best of our knowledge correct at the time of the assessment (October 2013).