The bi-monthly Traditional Market Report (TMR), developed by EatSafe, tracks behaviors and daily decisions made by vendors and consumers in two markets in Abuja, Nigeria (Utako and Gosa). In addition to summarizing perceptions on COVID-19 and the difficulties faced by market actors in these two traditional markets, the TMR tracks prices of selected nutritious foods every two weeks. The TMR report tracks several accepted indicators that help determine the resilience of market systems as market actors cope with business and food security choices under COVID-19 conditions. The TMR highlights two new surveys from February and March 2021 phone interviews of a panel of vendors (n=30) and consumers (n=32), comparing results to the first TMR in January 2021.

### Insights from vendor perspective between January and March 2021
- Share of vendors reporting a decrease in the number of customers in the last 9 months decreased (67% Jan; 63% Feb; 50% Mar) while those reporting an increase increased (20% Jan; 30% Feb; 43% Mar).
- Share of vendors finding it somewhat difficult to follow new COVID-19 rules in the market changed between months (40% Jan; 43% Feb; 23% Mar).
- An increasing share of vendors (33% Jan; 40% Feb; 50% Mar) stated having started to share resources with other vendors including sanitizers, masks, suppliers, and hand washing facilities.
- The share of vendors that borrowed money due to COVID-19 decreased (53% Jan; 40% Feb; 40% Mar). In March, major sources for money borrowed were banks (33%), friends (25%), and other businesses (25%).
- The share of vendors being aware of business trainings offered by market authorities due to COVID-19 increased (17% Jan; 13% in Feb; 30% in March).

### Insights from consumer perspective between January and March 2021
- The share of consumer households that have been financially impacted by the COVID-19 pandemic (loss/reduction of income) decreased (88% Jan/Feb; 75% Mar).
- The share of consumers visiting the market every 2-3 days decreased (38% Jan; 22% Feb; 13% Mar).
- The share of consumers that reported doing most of their food shopping at the market changed over time (78% Jan; 59% Feb; 66% Mar).
- The share of consumers that made changes to the food they typically buy fluctuated (63% Jan; 22% Feb; 41% Mar); of those that made changes in March, all decreased the quantity of foods (rice, beans, and yams).
- The share of consumers that have been asked for feedback by vendors and/or market officials in the last 9 months increased (16% Jan; 19% Feb; 28% Mar).

### Food prices between December 2020 and March 2021
While food prices for all pulses increased between Dec-20 and Mar-21 (soya beans 47%; brown beans 39%; white beans 34%) prices for vegetables decreased (tomatoes 24%) or remained unchanged (carrots, lettuce); prices for animal source foods fluctuated only little (fish +9%; eggs +8%; beef +3%) and stayed unchanged for chicken.
1. BACKGROUND ON COVID-19 SITUATION

After a significant and sustained rise in Nigeria’s national COVID-19 daily infection rate between December 2020 and mid-January 2021, the country witnessed a decrease in daily new cases across all zones of the country. By the end of March, the daily infection rate was down to ~100 (Fig. 1).

Out of the 2,180,444 samples tested for COVID-19 (by 7 June 2021), 166,767 cases have been confirmed positive with 2,117 deaths recorded by the Nigeria Centre for Disease Control (NCDC). Of all territories in Nigeria, Abuja, the Federal Capital Territory (FCT), had the second highest incidence of confirmed cases (19,872) and deaths (166).

In early March 2021, Nigeria received the first doses of COVID-19 vaccine. The country expects 84 million doses and plans to 70% of the total population covered by 2022. The decreasing infection rates have led to gradual reopening of the economy and social life in the country. While many people are still regularly using face masks, sanitizer, or both, overall, the low infection rates led to individuals to relax their use of the recommended COVID-19 preventive guidelines especially in public places, including traditional markets. Overall, government and other relevant stakeholders remain vigilant through sustained public awareness initiatives to prevent a possible third wave.

A routine assessment of traditional market activities indicated a near-optimal transaction capacity with no sign of social distancing practice and very limited face masks being used especially in the two major COVID-19 epic centers, Abuja and Lagos. However, COVID-19 awareness remains very high and both vendors and consumers are conscious of their individual responsibilities. This new health consciousness has also positively impacted the overall level of food safety as observed in the two traditional markets in Gosa and Utako. There has been an improvement in waste management and the frequency of water supply by government, which led to market associations and individuals supporting regular handwashing and exposed products like vegetables. Furthermore, in the last few months, 30 locally fabricated COVID-19 leg pump hand sanitizer machines have been installed in strategic locations at both markets for use when entering the markets.
2. MARKET CHARACTERISTICS AND CHANGES DUE TO COVID-19

Utako market and Gosa market are both located in the Abuja Municipal Area Council, two of eleven markets in the area (Fig. 2). Both markets are in an urban environment and mainly offer food products including grains, fruits and vegetables, dairy, meat, poultry, and fish, as well as fats and oils, eggs, legumes, and seeds.

Fig. 2 Location of Utako and Gosa market in Abuja, Nigeria (left); Utako market, Abuja, Nigeria (right).

2.1 Utako Market, Abuja
Utako market is a semi open-air market and is well connected to farms where fresh produce is transported on well-established roads. Easy vendor access to food products leads to lower costs for vendors in the Utako market. The market operates daily but has its major market day on Saturdays. According to the market association, the number of shops and open stalls is about 2,200 with about 4,500-6,000 vendors operating in the market daily. About 10,000-12,000 customers go to the market each day, mainly from surrounding neighborhoods in Abuja.

2.2 Gosa Market, Abuja
Gosa market is an open-air market near the Nnamdi Azikiwe airport and a major food market in the area for both wholesale and retail. While it is slightly south of the city center, it is a major hub also for traders and customers from other provinces and states in Nigeria. While the market is open every day, the major market day is Friday when most wholesale transactions are conducted with traders from neighboring provinces and states. According to the market association, the market has a capacity of about 1,500-2,500 vendors and about 5,000 customers daily. This number increases to about 7,000 customers on Fridays.

2.3 Bi-Weekly Consumer and Vendor Survey Results under COVID-19
In addition to the resilience assessment, EatSafe continues to conduct rapid COVID-19 market surveys of 40 consumers and 40 vendors from each market. This activity began in October 2020 and has since been repeated every two weeks, with results summarized and published in market-specific bulletins every month. Results below are from both markets including all data rounds between October 2020 and March 2021.1

2.3.1 Impact of COVID-19 in the markets

Results of the rapid assessment indicate 54% of consumers reported concerns when shopping in the market in recent weeks. Fig. 3 shows that those with concerns identified the following issues: (1) fear of contracting COVID-19 (38%), (2) the inconvenience of taking protective measures (18%) and (3) not trusting the market to take appropriate precaution (18%). Most consumers (55%) observed changes in the markets due to COVID-19 in the last two weeks, mentioning the set-up of washing facilities or hand sanitizer (33%), face mask mandate to all consumers (26%) and vendors (22%), and thorough cleaning of markets with disinfectant (24%).

Almost all vendors (91%) interviewed in the bi-weekly assessments stated that the pandemic had an immediate impact on their business. Fig. 4 shows the immediate impact on business due to COVID-19. Over half of the vendors stated that they experience decreased sales and customers, while 37% had difficulties transporting goods, (32%) accessing product to sell and (28%) difficulty to access financing.

3. MARKET RESILIENCE UNDER COVID-19

This TMR highlights two new data sets from February and March and compares them to January data from the first TMR. Data was collected through monthly panel interviews with 30 vendors and 32 consumers from Utako and Gosa markets. For this report, food prices were assessed between 9 December 2020 and 10 March 2021.

3.1 Connectivity

Connectivity includes not only the extent of connections vendors or other market actors might have but also the relationships between connected actors. Too many or too few connections can hamper the capacity to...
generate or sustain the growth of the market system. In this assessment connectivity is analyzed based on the vendors’ observations regarding the number and changes in customers and suppliers. By March, the share of vendors reporting a decrease in customers in the last 9 months declined to 50% and the share of vendors reporting an increase in customers increased to 43% (Fig. 5).

![Fig. 5 Vendors: Changes in the number of customers, last 9 months](image)

Looking at Fig. 6 changes in the actual number of customers on a typical day can be observed. In March, one third of the vendors reported to have 26-35 customers. The number of suppliers from which vendors purchased their goods has increased slightly; only two vendors relying on one supplier; almost half of the vendors (47%) reported 4 to 5 suppliers for their business in March 2021.

![Fig. 6 Vendors: Number of customers on a typical day](image)

### 3.2 Diversity

**Diversity** has multiple dimensions, including (1) the amount of variation in a system (i.e., the frequency and purpose of visiting the markets from consumer perspectives) and (2) the balance between different types (i.e., types of products, firm sizes, marketing channels, or end markets) or (3) market system composition, (i.e., how aspects of a market system are related to each other). In this assessment, diversity was analyzed based on vendors’ observations of the number and changes to commodities sold and consumers’ shopping behavior.

None of the vendors reported changing the type of products sold in their business in the last month. The number of different products sold did not change substantially from January to March 2021 (Fig. 7). In March, most vendors sold 2-5 products (40%) or 5-15 (37%) products in their businesses.
For consumers, the frequency of visiting the markets shifted slightly between January and March 2021 (Fig. 8). The share of consumers that went every 2-3 days decreased (38% Jan; 12% Mar), while the share of those that stated to go twice a month increased (6% Jan; 25% Mar). For all consumers the purpose for visiting the market was to buy foods or other goods for themselves or the own family; 9% of consumers also went to the market to buy foods or other goods for relatives that are unable to go shopping, in March.

3.3 Equity and fairness

From a systems perspective, **equity and fairness** refers to the level or degree of equality and fairness inherent rules and laws, both informal and formal. The panel of vendors were asked how difficult it was for them to follow the new rules and regulations enacted due to COVID-19 (e.g., social distancing, wearing a face mask, and performing hand sanitizing and temperature checks when entering the market space). It became less difficult for most vendors following new rules and regulations over the months (Fig. 9). The share of vendors that found it not difficult at all or not very difficult to follow the COVID-19 rules still in place in the markets increased (33% Jan; 43% Feb; 67% Mar).
3.4 Cooperation

Cooperation refers to market actors collaborating to achieve a common purpose or function. Cooperation is neither good nor bad and the contribution of cooperation depends on the purpose. Here cooperation was measured asking vendors if they have started sharing resources with other businesses due to COVID-19. Between January and March 2021, an increasing share of vendors (33% Jan; 40% Feb; 50% Mar) started sharing resources with other businesses. Those that shared resources mainly shared sanitizers (80%), new hand washing facilities (67%) and masks (47%) with other vendors in March 2021 (Fig. 10).

3.5 Competition

Competition is defined as rivalry between two or more entities. Like cooperation, competition can be negative or positive. Its contribution to system resilience capacities depends on how and why the entities are competing. Competition in this assessment has been measured based on changing vendors practices based on what they had seen of their competitors and on consumers’ reasons, trust, and loyalty in the vendors from where they buy food.

Between January and March 2021, most of the vendors in this panel (80% Jan; 100% Feb; 83% Mar) reported they had not changed their own business practices based on competitors. As of March, those vendors that reported a business practice change due to competitors all added the offer of a discount (100%) and many offered credits (80%). In contrast, in the same quarter consumers that reported changes to the food items typically bought fluctuated (63% Jan; 22% Feb; 41% Mar). Throughout all three months the major changes mentioned were a decrease purchase of food items, including rice, beans, and yams. The two markets under assessment were still the most common places where consumers obtained food despite a 15% decrease (78% Jan; 59% Feb; 66% Mar) in the share of consumers that reported doing most of their food shopping at the market. In March, other places where consumers obtained food from were other open-air markets (50%), kiosks (22%), supermarkets (22%) or small shops (9%).

The reasons for buying food at the two markets were similar during the three rounds. In March, 72% of the consumers stated as their main reason the good quality/freshness of food, convenience/easy reach from home (59%), and good prices (50%). While the share of consumers mentioning “good prices” and “cleanliness” as reasons fluctuated (good prices: 59% Jan; 69% Feb; 50% Mar; cleanliness: 16% Jan; 6% Feb; 12% Mar) the good selection of food increased (16% Jan; 22% Feb; 28% Mar (Fig. 11).
Fig. 12 shows that the level of trust for the vendors that consumers bought food from has fluctuated between rounds. The share of those consumers that said majority or all of the vendors are trustworthy increased by 22 percentage points between January and February but decreased again by 16 percentage points between February and March (44% Jan; 66% Feb; 50% Mar). The reasons for those with a good level of trust included good quality/freshness of food (57% Jan; 62% Feb; 25% Mar), low prices (50% Jan; 38% Feb; 50% Mar), knowing the vendors well/buying regularly from the same vendors (43% Jan; 62% Feb; 56% Mar), and the proximity/near to home (29% Jan; 14% Feb; 12% Mar).

For those consumers that only described a few vendors as trustworthy or not at all trustworthy, major reasons included changing prices (22% Jan; 9% Feb; 44% Mar), vendor being far from home (17% Jan; 27% Feb; 6% Mar), not being related to the vendor (11% Jan; 36% Feb; 31% Mar) or the vendor using different business methods (6% Jan; 45% Feb; 31% Mar).

The mixed level in trust might also explain a rather diverse picture in terms of vendor loyalty, which did not change substantially over the months. About one third of consumers visited the same vendor occasionally (34% Jan; 41% Feb; 31% Mar), another third went usually (34% Jan; 28% Fab; 34% Mar), while another third always visit the same vendors (31% Jan; 28% Feb; 31% Mar). None/only a few consumers (0% Jan; 3% Fab; 3% Mar) stated to not pay attention from which vendor they buy their food.
3.6 Business strategy

Business practices are oriented toward generating value for customers. They can be investments in understanding customers, in building customer relationships, in tracking customer retention and growth, in investing in staff and firm capacity, and in merit-based hiring. Business strategy in this assessment has been measured based on vendors’ business practices, training possibilities and additional funding, as well as consumers’ being asked for feedback.

Between January and March, about one third of vendors (33% Jan; 27% Feb; 30% Mar) used business strategies to increase the number of customers and sales during the last 9 months. Most strategies taken in March included the provision of discount (78%), provision of credit (44%), and the use of advertisement (22%) (Fig. 13). Further, the share of vendors being aware of business training and support being offered by market authorities due to COVID-19 increased (17% Jan; 13% Feb; 30% Mar).

Despite a 25% decrease from January to March, still 40% of vendors reported borrowing money to pay for unexpected expenses due to COVID-19 in March 2021. Fig. 14 depicts the diversity of the sources for money. As of March, vendors relied on banks (33%), relatives (17%), friends (25%), other businesses (25%), and informal cooperatives (17%). In March 2021, about one fourth (28%) of consumers have been asked by market officials or vendors to provide feedback; of those asked (n=9), 89% reported that their suggestions related to safety regulations due to COVID-19 have been addressed or taken on board.
4. FOOD PRICES

Tracking food prices allows market stakeholders to assess supply and demand of foods in the market. In this assessment, prices of different nutritious commodities and food groups have been tracked over time in NGN.\(^2\)

Between Dec-20 and Mar-2021, the food prices for pulses (i.e., white, brown, and soya beans) increased 34%, 39% and 47%, respectively (Fig. 16). Although the monthly food prices collected for the Consumer Price Index (CPI) by the National Bureau of Statistics are similar for brown and white beans in the state of Abuja (478 NGN/kg and 322 NGN/kg in Mar-21), the price in official statistics decreased during this time period. Since the official price statistic includes a wider range of markets, this report assumes the underlying assessments are valid for the two markets. The increases in prices for pulses can be explained by seasonality and external factors (e.g., security challenges). Official price data for Abuja state shows increase in prices for plantain (unripe) (41%), palm oil (35%) and maize grain (yellow and white) (20%/18%) from Dec-20 to Mar-21. Prices fell for broken rice (Ofada) and tinned milk (both 11%). Overall, the CPI on foods for urban areas in Nigeria increased by 6% during the time studied.

Fig. 15 shows the vegetable prices for this report which were assessed from carrots, lettuce, and tomatoes. While prices decreased by 24% for tomatoes between Dec-20 and Mar-21, prices for carrots and lettuce did not change. While the official statistics show higher prices for tomatoes on average, this data indicates a slight price decrease from Dec-20 to Mar-21.

For animal source foods, prices for eggs (1 crate, 30 pieces), fresh fish (Titus), beef, and chicken were assessed (Fig. 17). While the price for beef, eggs and fish increased by 3%, 8% and 9%, respectively, between Dec-2020 and Mar-21, food prices for chicken did not change. The official statistics for Abuja state show a very comparable increase in prices for beef (4%) and eggs (6%).

\(^2\) As of 10 March 2021, 500 NGN \(\approx\) 1.26 US$.COVID-19 Traditional Market Report | Abuja, Nigeria | March 2021 | Issue 2
5. CHARACTERISTICS OF RESPONDENT SAMPLE

<table>
<thead>
<tr>
<th>VENDOR (n=30)</th>
<th>CONSUMER (n=32)</th>
</tr>
</thead>
<tbody>
<tr>
<td>63% of the vendors are male; most are in the age group 31-40 years of age (Tab. 1).</td>
<td>69% of the consumers are female; most are in the age groups 31-40 or 51-65 years of age.</td>
</tr>
<tr>
<td>50% of vendors have not attended school.</td>
<td>53% of consumers attended secondary school.</td>
</tr>
<tr>
<td>Most vendors sell grains, vegetables, and legumes.</td>
<td>62% of consumers lived in Abuja for 10+ years.</td>
</tr>
<tr>
<td>On average, live in households of six people.</td>
<td>75% of the consumers were financially affected by COVID-19 in March (88% Jan; 88% Feb); 50% of those negatively affected reported a reduced income through fewer business opportunities; 62% of those negatively affected relied on savings to cope with the situation.</td>
</tr>
<tr>
<td>74% of vendors have been operating in the market for 5 years or longer and (as of March 2021) 97% of vendors aim to continue with their business even if COVID-19 continues.</td>
<td></td>
</tr>
</tbody>
</table>

Tab. 1 Characteristics of respondents in this panel

<table>
<thead>
<tr>
<th>Gender (male</th>
<th>female)</th>
<th>VENDORS (n =30)</th>
<th>CONSUMERS (n = 32)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Age group</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>25-30 years</td>
<td>63%</td>
<td>37%</td>
<td></td>
</tr>
<tr>
<td>31-40 years</td>
<td>50%</td>
<td>44%</td>
<td></td>
</tr>
<tr>
<td>41-50 years</td>
<td>3%</td>
<td>6%</td>
<td></td>
</tr>
<tr>
<td>51-65 years</td>
<td>27%</td>
<td>41%</td>
<td></td>
</tr>
<tr>
<td>Highest level of school attended</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Primary school</td>
<td>23%</td>
<td>44%</td>
<td></td>
</tr>
<tr>
<td>Secondary school</td>
<td>17%</td>
<td>53%</td>
<td></td>
</tr>
<tr>
<td>Higher education</td>
<td>10%</td>
<td>3%</td>
<td></td>
</tr>
<tr>
<td>No school attended</td>
<td>50%</td>
<td>0%</td>
<td></td>
</tr>
<tr>
<td>Length of operating in the market (vendor)</td>
<td>living in Abuja (consumer)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>1-3 years</td>
<td>7%</td>
<td>6%</td>
<td></td>
</tr>
<tr>
<td>3-5 years</td>
<td>23%</td>
<td>3%</td>
<td></td>
</tr>
<tr>
<td>5-10 years</td>
<td>30%</td>
<td>28%</td>
<td></td>
</tr>
<tr>
<td>&gt;10 years</td>
<td>40%</td>
<td>63%</td>
<td></td>
</tr>
</tbody>
</table>

6. METHODS ASSESSING MARKET CHARACTERISTICS UNDER COVID-19, RESILIENCE AND FOOD PRICES

Insights into market system resilience were based on interviews with 32 consumers and 30 vendors from two informal markets in Abuja, who were interviewed between 12 January and 24 March 2021. The panel of vendors and consumers was purposefully selected from Utako and Gosa markets in Abuja in December 2020. The panel was based on the respondent’s gender and age profiles, which were previously examined in rapid assessments (see below). The same panel of consumers and vendors are interviewed monthly via phone interviews and following a structured questionnaire.

The USAID Market System Resilience Framework defines market system resilience as “…the ability of people, households, communities, countries, and systems to mitigate, adapt to, and recover from shocks and stresses in a manner that reduces chronic vulnerability and facilitates inclusive growth.” For market systems, resilience further includes the ability to allocate resources, draw on optimal resources, and innovate to solve problems in the face of shocks and stresses. This report uses six of the eight domains highlighted in the USAID framework.
to characterize resilience capacities (connectivity, diversity, equity and fairness, cooperation, competition, business strategy) with both fast and slow indicators.

In addition to data on market system resilience, this report conducted a rapid assessment from 680 consumers and 680 vendors from Utako and Gosa markets. Approximately every two weeks, 40 consumer and 40 vendors in each market were randomly selected for surveys. All surveys were conducted in adherence with global guidelines on COVID-19 prevention and control. Data included in this report ("Market characteristics and changes due to COVID-19") were collected between 6 October 2020 and 13 March 2021. All data were collected via Open Data Kit and stored on KoBo ToolBox; Stata version 15.1 was used for data analysis.

Food prices for selected nutritious foods (pulses, vegetables, and animal source foods) were collected approximately every two weeks from each market. Prices were assessed on 9 December 2020, 8 January, 18 February, and 10 March 2021. Foods were selected based on its nutritive value, availability, and cultural acceptance. Data for foods were collected in standard units (kilogram or crate), and prices were averaged using NGN (500 NGN $1.26 US$). For each round and food item, three comparative prices from three vendors in each market were collected by trained enumerators at similar times and days of the week. The weight of pulses, fish, and vegetables were collected together with the price assessment, and average weights for standard units were then calculated. Although not all the assessed commodities are directly comparable to the official prices for Abuja state in the monthly CPI by the National Bureau of Statistics, EatSafe tracked and compared official bi-monthly price data and compared the national assessments to the average monthly prices of this assessment, allowing for validation of these data.

7. GAIN COVID-19 RESPONSE

The necessary COVID-19 lockdowns have placed a spotlight on the weaknesses of food systems across the world. In the COVID-19 context the single most important thing that can be done for the health and resilience of people and economies is to protect the nutritional status of current and future generations. GAIN has developed the Keeping Food Markets Working (KFMW) program as an emergency response to the COVID-19 crisis, providing rapid support to food system workers, to small and medium enterprises supplying nutritious foods, and to keeping fresh food markets open. While disease control responses to the pandemic are essential, they also disrupt food systems, depress income, and put a strain on social protection programs, which can threaten the nutritional status of the most vulnerable. The KFMW program is focused on mitigating those risks and keeping affordable nutritious foods flowing in African and Asian markets to the people who most need it. The KFMW program consists of five workstreams:

1. Building resilience of small- and medium-sized enterprises (SMEs)
2. Maintaining and reinforcing efforts in Large-Scale Food Fortification
3. Ensuring food markets stay open and are operating safety
4. Investing in nutrition security for key workers in the food system
5. Supporting effective policymaking and coordination during the pandemic

Through KFMW, EatSafe is working to better understand the rapidly changing situation in traditional food markets from the vendor and consumer perspective under workstream 3.

8. EATSAFE DATA COLLECTION FOR MUNICIPALITIES

EatSafe: Evidence and Action Towards Safe, Nutritious Food, is a five-year project aiming to enable lasting improvements in the safety of nutritious foods in traditional markets by focusing on the consumer. The COVID-19 Traditional Market Report | Abuja, Nigeria | March 2021 | Issue 2
COVID-19 pandemic has plunged the world into an unprecedented global health crisis. Difficult to manage at the best of times, traditional markets are generally crowded with customers and vendors creating ideal conditions for transmission of the virus. When market vendors and other food system workers cannot do their jobs, increased food prices and/or food shortages are likely to result in reducing demand for fresh, nutritious foods and eroding market resilience. Furthermore, real, and perceived risks can undermine consumer trust in the health and safety of food markets.

EatSafe’s COVID-19 response is working to better understand the rapidly changing situation in traditional food markets from the vendor and consumer perspective. Through bi-weekly market surveys and monthly key informant interviews, EatSafe is assessing the accessibility of safe nutritious food, availability of health and safety information and the resilience of traditional markets. EatSafe will continue to use and disseminate results to help ensure food markets remain open, that safe, nutritious food is available under COVID-19 and to support future programming for safe and resilient nutritious food markets.


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