The quarterly 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 three new surveys from April, May, and June 2021 phone interviews of a panel of vendors (n=30) and consumers (n=32).

**Insights from vendor perspective between April and June 2021**

- Share of vendors who reported a decrease in the number of customers in the last 9 months decreased between April and June (60% Apr; 70% May; 50% Jun) while those reporting an increase increased from April (17%) to 27% in June.
- Share of vendors who found it not difficult at all to follow new COVID-19 rules in the market increased substantially (27% Apr; 37% May; 60% Jun).
- The type of resources shared by vendors included new hand washing facilities (90% Apr; 50% May; 64% Jun) to sanitizers (60% Apr; 83% May; 91% Jun) between April and June.
- The share of vendors that borrowed money due to COVID-19 decreased between April and June (57% Apr; 37% May; 40% Jun). In June, most vendors relied on informal cooperatives (33%), other businesses (25%), banks (17%), or friends (17%).

**Insights from consumer perspective between April and June 2021**

- The share of consumer households that were financially impacted by the COVID-19 pandemic (loss/reduction of income) decreased slightly between April and June (78% Apr/May; 72% Jun).
- The share of consumers that reported doing most of their food shopping at the market decreased between the months (69% Apr/May; 50% Jun). In June, other sources to obtain food were other open-air markets (62%), supermarkets (22%) and kiosks (16%).
- The share of consumers who considered majority of vendors as trustworthy increased from 41% in April/May to 59% in June.

**Food prices between January and June 2021**

Food prices for all pulses, animal source foods and tomatoes increased substantially between Jan-Jun (tomatoes 136%; soya beans 68%; brown beans 66%; white beans 62%; fish 50%; beef 31%; chicken 20%; eggs 15%). Prices for carrots and lettuce remained (almost) unchanged (carrots +/- 0%; lettuce -2%).
I. BACKGROUND ON COVID-19 SITUATION

After a significant decline in Nigeria’s national COVID-19 weekly infection rate since January 2021, the infection rates between April and June remained low and almost unchanged (Figure 1).

Between January 3 and June 28, 2021, 167,803 confirmed cases of COVID-19 and 2,121 deaths were reported by the Nigeria Centre for Disease Control (NCDC). The average weekly infection rate in June was 262. Of all territories in Nigeria, Abuja, the Federal Capital Territory (FCT), had the second highest incidence of confirmed cases after Lagos.

In early March 2021, Nigeria received the first doses of COVID-19 vaccine. By June 4, 1,964,095 and 261,670 Nigerians received their first and second dose of vaccine, respectively.

While decreasing infection rates led to gradual reopening of the economy and social life in the country, epidemiological reports by the NCDC indicate that Nigeria is at the threshold of a third wave of the COVID-19 pandemic. As the markets and economic systems are yet to recover from the previous episodes of high incidence rates and restrictions, a third wave is likely to have an even greater impact on people’s purchasing power and access to safe and nutritious food.

Despite this, recommended COVID-19 preventive measures including the use of face masks, and/or sanitizer, seem to be dismissed by most people in public places including the traditional markets under assessment. Following the lift of previous restrictions, supply of vegetables and other perishable commodities to the markets increased and vendors and traders are busily trying to take advantage of the situation before any possible disruption due to an increase in COVID-19 infection rates and accompanying restrictions might occur.

The government and other stakeholders remain vigilant of the situation and sustain public awareness initiatives to prevent a possible increase in COVID-19 cases. In the two markets under assessment, the market response unit committee increased activities including efforts for sanitization and the mass distribution of face masks to vendors and customers.
2. MARKET CHARACTERISTICS AND CHANGES DUE TO COVID-19

Utako market and Gosa market are both located in the Abuja Municipal Area Council (AMAC), two of eleven markets in the area (Figure 2). While Utako market is in the urban center, Gosa is at the fringe of the AMAC and easily accessible for vendors, traders, and customers from different socio-economic backgrounds. The markets offer a variety of nutritious food products including grains, fruits and vegetables, dairy, meat, poultry, and fish, as well as fats and oils, eggs, legumes, and seeds. Both markets are of high importance not only locally but for the whole AMAC as they supply other food centers in the area.

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 June 2021.\(^1\)

### 2.3.1 Impact of COVID-19 in the markets

Results of the rapid assessment indicate 51% of consumers had concerns when shopping in the market in recent weeks. **Figure 3** shows that those with concerns identified the following issues: fear of contracting COVID-19 (35%), the inconvenience of taking protective measures (17%) the food wanted not being available (16%), not trusting the market to take appropriate precautions (15%) and vendors getting sick and not being open (10%). Most consumers (69%) observed changes in the markets due to COVID-19 in the last two weeks, mentioning the set-up of washing facilities or hand sanitizer (51%), face mask mandate to all vendors (37%) and consumers (33%), and thorough cleaning of markets with disinfectant (25%).

Most vendors (83%) interviewed in the bi-weekly assessments stated that the pandemic had an immediate impact on their business. **Figure 4** shows that over half of the vendors experienced decreased sales and customers, while 33% had difficulties transporting goods, (31%) accessing product to sell and (28%) difficulty to access financing.

### 3. MARKET RESILIENCE UNDER COVID-19

This TMR highlights three new data sets from April, May, and June 2021. 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 January 27 and June 23, 2021.

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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.

The share of vendors who reported a decrease in customers in the last 9 months increased between April (60%) and May (70%) but declined in June (50%). At the same time, the share of vendors who reported an increase in customers decreased slightly between April and May but increased again in June (17% Apr; 13% May; 27% Jun) (Figure 5).

However, reports on actual number of customers on a typical day varied slightly across the months (Figure 6). By June, the share of vendors reported to have “6-10 customers” and “26-35 customers” increased from 0% and 23% in April to 7% and 27%, respectively. The share of vendors with “11-15 customers” decreased from 20% in April/May to 17% in June. Similarly, the number of suppliers varied slightly over the three months. Share of vendors who relied on “6-7 suppliers” increased from 7% in April to 23% in June, and those vendors with only one supplier decreased from 7% in April to 3% in May/June. Only 7% of the vendors stated an overall change in their suppliers during the last month in April.

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. However, there were varied changes in the number of different products sold within the quarter (Figure 7). In June, the
share of vendors who reported selling only one product in their business declined from 13% in April/May to 7% and those that sold “2-5 products” increased from 47% in April/May to 67%.

Similarly, only a slight change in consumers’ frequency of visiting the markets could be observed between April and June (Figure 8). While the share of consumers that went to the market every 2-3 days increased from 16% in April to 25% in June, the share of those that stated to go twice a month decreased from 12% in April to 3% in June. For all consumers, in all three months, the main purpose for visiting the market was to buy foods or other goods for themselves or their own family. In June, 6% of consumers also went to the market to buy foods or other goods for relatives that are unable to go shopping.

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).

Overall, it became less difficult for most vendors following new COVID-19 rules and regulations over the 3 months (Figure 9). The share of vendors that found it not difficult at all to follow the COVID-19 rules still in place in the markets increased from 27% in April to 60% in June.
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.

The share of vendors that started sharing resources with other businesses increased slightly but did not change substantially between April and June (33% Apr; 40% May; 37% Jun). However, the focus of actual resources shared shifted between April to June from new hand washing facilities (90% Apr; 50% May; 64% Jun) to sanitizers (60% Apr; 83% May; 91% Jun). Also, the proportion of vendors who shared masks increased from 30% in April to 55% in June (Figure 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 April and June, only a few vendors (13% Apr; 10% May; 13% Jun) reported changes in their own business practices based on competitors. In June, those vendors that reported business practice changes added the offer of a discount (75%), offered credits (50%) or added a hygiene concept (25%).

In the same quarter, about one third of consumers reported changes to the food items typically bought (38% Apr; 31% May; 41% Jun). Throughout all three months the major/the only changes mentioned were a decreased purchase of food items, including rice, beans, and yams. Although the two markets under assessment were still (the most) common places to obtain foods, the share of consumers who reported doing most of their food shopping at the market decreased from 69% in April/May to 50% in June (Figure 11). Other open-air markets (62%), supermarkets (22%) and kiosks (16%) were other places where consumers...
bought food from in June. The reasons for buying food at the two markets under assessment were similar during the three rounds. In June, 75% of the consumers stated convenience/easy reach from home, good prices (66%), and good quality/freshness of food (56%) as their main reason.

Despite the reduced number of consumers shopping at one of the two markets, the level of trust for the vendors that consumers bought food from improved slightly (Figure 12). The share of those consumers that said majority or all the vendors are trustworthy increased from 41% in April/May to 59% in June.

The reasons for those with a good level of trust are shown in Figure 13 and included good quality/freshness of food (69% Apr; 54% May; 67% Jun) and low prices (56% Apr; 54% May; 57% Jun). Knowing the vendors well/buying regularly from the same vendors, being of same ethnicity than the vendor, and identifying with other customers were also mentioned as reasons in April by 44%, 38% and 31% of consumers, respectively. However, all three reasons were only mentioned by 10% of consumers in June. For those consumers that only described a few vendors as trustworthy or not at all trustworthy, major reasons changed over the months. While in April and June most consumers mentioned vendors using different methods (50% Apr; 26% May; 36% Jun) and changing prices (38% Apr; 32% May; 36% Jun) as reasons for lower trust, the impossibility of identifying with other customers was the main reason in May (0% Apr; 42% May; 9% Jun). The mixed level in trust might also explain a rather diverse picture in terms of vendor loyalty, which decreased slightly over the months (Figure 14). While 25% of customers always visited the same vendors in April, the share decreased to 6% in May then increased to 16% in June. The share of consumers that went occasionally to the vendors they knew increased since April (38% Apr; 59% May; 56% Jun).

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**Figure 12. Consumers: Level of trust for the vendors they buy food from**

**Figure 13. Consumers: Reasons for good level of trust**

**Figure 14. Consumers: Frequency of buying at the same vendor**
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.

The share of vendors that used business strategies to increase the number of customers and sales during the last 9 months increased from 17% in April/May to 23% in June. Types of strategies taken in June included the provision of discount (88%), provision of credit (25%), and the use of advertisement (12%) (Figure 15). The share of vendors being aware of business training and support being offered by market authorities due to COVID-19 changed slightly within the quarter (27% Apr; 20% May; 23% Jun).

The share of vendors who reported borrowing money to pay for unexpected expenses due to COVID-19 decreased from 57% in April to 37% in May, and slightly increased again to 40% in June. Figure 16 depicts the diversity and changes of the sources for borrowing money over the three months. While relatives and friends were the most mentioned sources in April (47% and 41%), other businesses were the most prominent source in May (36%) and in June most vendors relied on informal cooperatives (33%).

Between April and June, about one fifth to a quarter (25% Apr; 19% May; 28% Jun) of consumers were asked by market officials or vendors to provide feedback. Of those asked in June, less than half (44%) reported that their suggestions related to safety regulations due to COVID-19 were addressed or taken on board.

![Figure 15. Vendors: Types of business strategies taken, last 9 months](image1)

![Figure 16. Vendors: Source of borrowed money due to COVID-19](image2)
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 January and June, prices for pulses (soya, brown and white beans) increased substantially by 68%, 66% and 62%, respectively (Figure 17). The increases were smaller over the last three months (white beans 23%; brown beans 20%; soya beans 14%) but remained relatively high. Comparing the price data on pulses with the monthly food prices collected for the Consumer Price Index (CPI) by the National Bureau of Statistics indicated similar price increases for brown and white beans (Jan-Jun: 102% and 76%, respectively). Since the official price statistic includes a wider range of markets, this report assumes the underlying assessments are valid for the two markets. Overall, the increases in prices for pulses can be explained by seasonality and external factors (e.g., security challenges).

Figure 18 shows the vegetable prices for this report which were assessed from carrots, lettuce, and tomatoes. While prices for carrots (+/- 0%) and (-2%) lettuce stayed almost unchanged between January and June, prices for tomatoes increased by 136% between the same time and by 90% between April and June. These figures are very comparable with the official statistics for Abuja state, showing an 114% price increase for tomatoes between Jan-Jun.

For animal source foods, prices for eggs (1 crate, 30 pieces), chicken, beef, and fresh fish (Titus) were assessed (Figure). For all animal source foods, prices increased between January and June and April and June. The price increase for Jan-Jun was highest in fish (50%), followed by

² As of 23 June 2021, 500 NGN = 1.22 US$. 
beef (31%), chicken (20%) and eggs (15%). Between April to June eggs increased by 15%, chicken and beef by 13%, and fish by 6%. The official statistics for Abuja state show a very comparable increase in prices for beef (32%) and eggs (11%) between Jan-Jun. Besides the substantial price increases in tomatoes and beans, the official price data for Abuja state depicts that also prices for yam tuber, plantain (unripe) and maize have increased by 84%, 75% and 42%, respectively, between Jan-Jun. Furthermore, the overall CPI in Nigeria increased by 7% during the time studied.

5. CHARACTERISTICS OF RESPONDENT SAMPLE

**Table 1 Characteristics of respondents in this panel (as of June 2021)**

<table>
<thead>
<tr>
<th></th>
<th>VENDORS (n=30)</th>
<th>CONSUMERS (n = 32)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Gender (male</td>
<td>female)</td>
<td>63%</td>
</tr>
<tr>
<td><strong>Age group</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>25-30 years</td>
<td>20%</td>
<td>9%</td>
</tr>
<tr>
<td>31-40 years</td>
<td>50%</td>
<td>44%</td>
</tr>
<tr>
<td>41-50 years</td>
<td>3%</td>
<td>6%</td>
</tr>
<tr>
<td>51-65 years</td>
<td>27%</td>
<td>41%</td>
</tr>
<tr>
<td><strong>Highest level of school attended</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Primary school</td>
<td>23%</td>
<td>44%</td>
</tr>
<tr>
<td>Secondary school</td>
<td>17%</td>
<td>53%</td>
</tr>
<tr>
<td>Higher education</td>
<td>10%</td>
<td>3%</td>
</tr>
<tr>
<td>No school attended</td>
<td>50%</td>
<td>0%</td>
</tr>
<tr>
<td>**Length of operating in the market (vendor)</td>
<td>living in Abuja (consumer)**</td>
<td></td>
</tr>
<tr>
<td>1-3 years</td>
<td>3%</td>
<td>6%</td>
</tr>
<tr>
<td>3-5 years</td>
<td>13%</td>
<td>3%</td>
</tr>
<tr>
<td>5-10 years</td>
<td>30%</td>
<td>28%</td>
</tr>
<tr>
<td>&gt;10 years</td>
<td>53%</td>
<td>63%</td>
</tr>
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</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 21 April and 21 June 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 1040 consumers and 1040 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 9 October 2020 and 26 June 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 27 January, 18 February, 10 March, 21 April, 13 May, and 23 June 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 ≈ 1.22 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 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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