

## EatSafe: Evidence and Action Towards Safe, Nutritious Food

### COVID-19 Traditional Market Report Brief

Dhaka, Bangladesh | March 2021 | Issue 2

The bi-monthly Traditional Market Report (TMR), developed by EatSafe, tracks behaviors and daily decisions made by vendors and consumers in two wet markets in Dhaka, Bangladesh (Bonolota and Islambagh City Corporation). 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=30), comparing results to the first TMR in January 2021.

#### *Insights from vendor perspective between January and March 2021*

- Share of vendors who found it not difficult at all to follow new COVID-19 rules in the market increased by 62% (60% Jan; 97% Feb; 97% Mar).
- Share of vendors stated having started to share resources with other vendors highly fluctuated between the months (10% Jan; 70% Feb; 0% Mar).
- Share of vendors being aware of business support (information, awareness) offered by market authorities due to COVID-19 increased by 37%; none of the vendors have used any business strategy to increase the number of customers and sales during the last three months.
- Share of vendors that borrowed money due to COVID-19 increased (47% Jan; 53% Feb; 73% Mar). Over all three months the money borrowed mainly came from relatives, informal cooperatives, banks, or friends.
- Share of vendors aiming to continue with their business even if COVID-19 continues increased by 17%.

#### *Insights from consumer perspective between January and March 2021*

- Share of consumer households that have been financially impacted by the COVID-19 pandemic (loss/reduction of income) fluctuated between the month (80% Jan; 70% Feb; 76% Mar).
- Share of consumers visiting the market daily decreased by 28%.
- Share of consumers that made changes to the food they typically buy increased (57% Jan; 57% Feb; 72% Mar); changes included an increasing quantity of foods, including meat, fish, vegetables, and fruits.
- Share of consumers that reported doing most of their food shopping at the market decreased by 13% (87% Jan; 80% Feb; 76% Mar).
- Share of consumers who considered most of their vendors majorly or extremely trustworthy fell by 17%.
- Throughout the three months none of the consumers stated to have been asked for feedback by vendors and/or market officials in the last 9 months.

#### *Food Prices between November 2020 and March 2021*

While prices for sour yoghurt and fish increased (31% and 7%, respectively), the prices for eggs decreased (6%). Prices for pulses and vegetables fluctuated (chickpeas +3%; lentils -2%; green papaya +2%; red amaranth +1%).

# I. BACKGROUND ON COVID-19 SITUATION IN THE COUNTRY

While the weekly incidence of Bangladesh's national COVID-19 cases has been significantly decreasing since December 2020, the weekly COVID-19 cases increased significantly since the end of February 2021 (Fig. 1).

Between 3 January and 25 March 2021, [580,808 confirmed cases of COVID-19 and 8,763 deaths](#) have been reported by the Directorate General of Health Services, under the Ministry of Health & Family Welfare of Bangladesh. As of 25 March, the daily rate of confirmed cases was 3,587.

Alarming confirmed cases increased by 91% between 8 and 15 March (Fig. 1). On 7 February Bangladesh

launched a nationwide COVID-19 vaccination campaign to immunize 80%

of its 170 million people. The government has created a web portal, [Surokkha](#), to simplify vaccine registration. By 25 March, 5 million (3%) of the population received at least one of the two doses of the vaccine.

Since 17 March 2020, educational institutions have been closed nationwide. Furthermore, the Bangladesh government has adopted the "No Mask, No Service" policy at all offices in the country since October 2020 and introduced a fine of 500-1000 BDT (USD\$ 6-12) as a punishment for not wearing masks in public places to contain the spread of the COVID-19 pandemic. Beginning 30 March 2021, the Bangladesh government has announced the reopening of schools and colleges and the opening of public and private offices. While the police played an active role regarding public awareness and monitoring compliance to rules at the earlier stages of the pandemic, the police involvement decreased as well as the commitment by the public to follow COVID-19 rules. Masks are being bought and kept in pockets or bags until they are needed for receiving any services from the banks or government offices. Since the start of the vaccination program, the seriousness of following the COVID-19 rules in the population seemed to have decreased further.

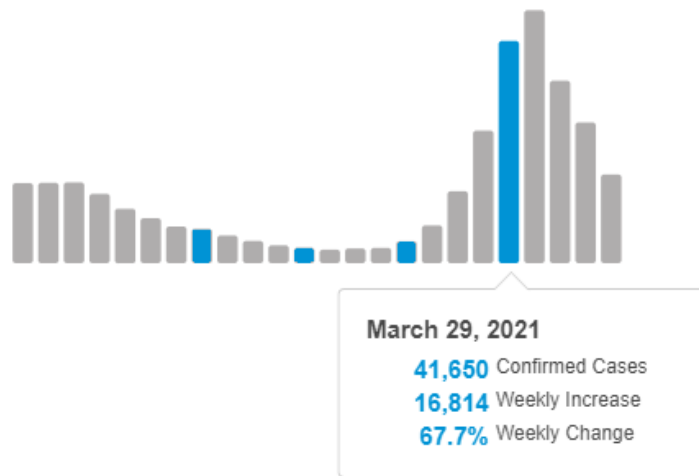


Fig. 1 Weekly confirmed COVID-19 cases in Bangladesh ([WHO, 18 June 2021](#)).

## 2. MARKET CHARACTERISTICS AND CHANGES DUE TO COVID-19

**Bonolota wet market** and **Islambagh City Corporation wet market** are both located in Old Dhaka under the Dhaka South City Corporation (Fig. 2). Both wet markets are large-scale markets that sell a wide range of products including poultry, fish, meat, eggs, vegetables, fruits, grains, legumes and other food and non-food items. Most of the vendors selling in the markets are male.

## 2.1 Bonolota wet market, Dhaka

The Bonolota wet market is the smaller market of the two wet markets assessed in this survey. The market has over 100 vendors and approximately 1,000-1,200 consumers visit the market daily.

## 2.2 Islambagh City Corporation wet market, Dhaka

The Islambagh City Corporation wet market is one of the largest markets in Old Dhaka. The market has separated food sections, one for fish, livestock, and poultry, a second for cereals, pulses, and vegetables, and a third section for eggs and edible oil. In total about 200 vendors operate in the market and on average, approximately 2,500 consumers visit the market daily.

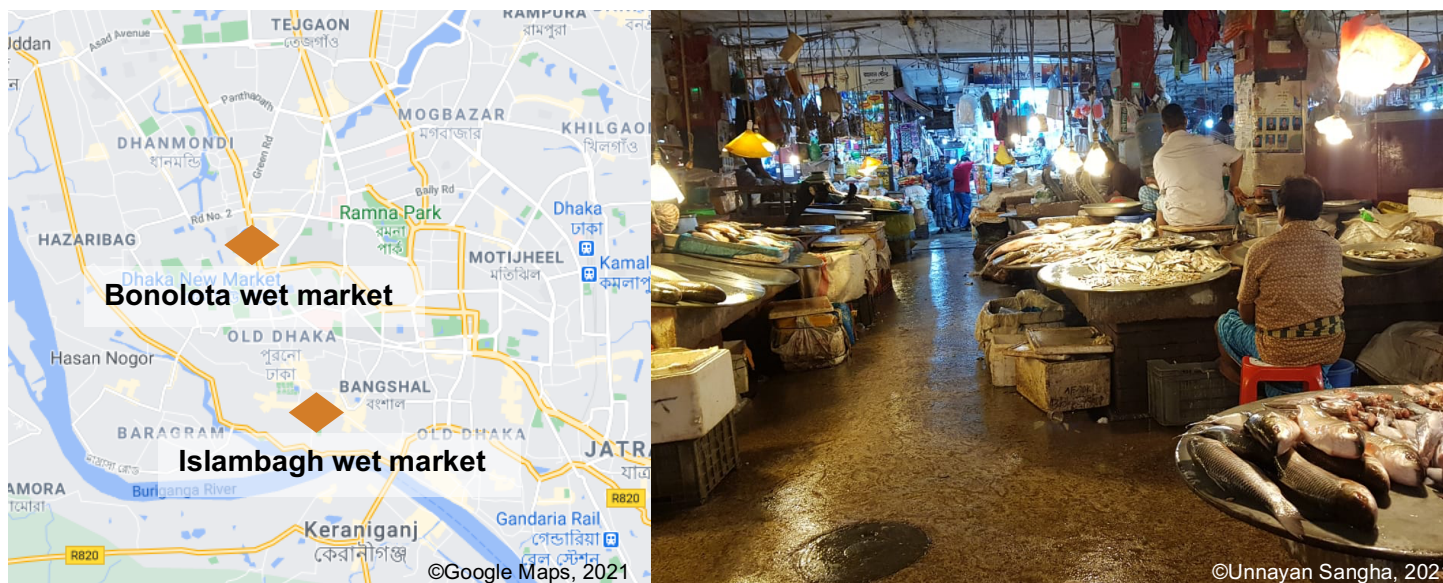


Fig. 2 Location of Bonolota and Islambagh City Cooperation wet market in Dhaka, Bangladesh (left); Bonolota wet market, Dhaka, Bangladesh (right).

## 3.4 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 September 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 September 2020 and March 2021.<sup>1</sup>

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

Based on the rapid assessment, 35% of consumers reported concerns when shopping in the market in the last couple of weeks. Fig. 3 shows that those with concerns identified the following issues: (1) fear of contracting COVID-19 (34%), (2) the inconvenience of taking protective measures (14%) and (3) vendor getting sick and not being open (8%) and (4) not trusting the market to take appropriate precaution (6%). Almost half of the consumers (46%) had observed changes in the markets due to COVID-19 in the last two weeks, mostly stating

<sup>1</sup> Global Alliance for Improved Nutrition. March 2021. COVID Bulletin. Bangladesh Issue #12-13. A USAID EatSafe Bulletin.

the set-up of washing facilities or hand sanitizer (69%), the thorough cleaning of markets with disinfectant (46%), and the mandate to all vendors (44%) and consumers (37%) to wear face masks.

Almost all vendors (96%) interviewed in the bi-weekly assessments stated that the pandemic had an immediate impact on their business. Fig. 4 highlights that most of the vendors stated that they experience decreased sales (86%) and customers (70%), while 20% had difficulties accessing financing, limited financial reserves (13%), or difficulties accessing product to sell (6%) or to transport (5%).

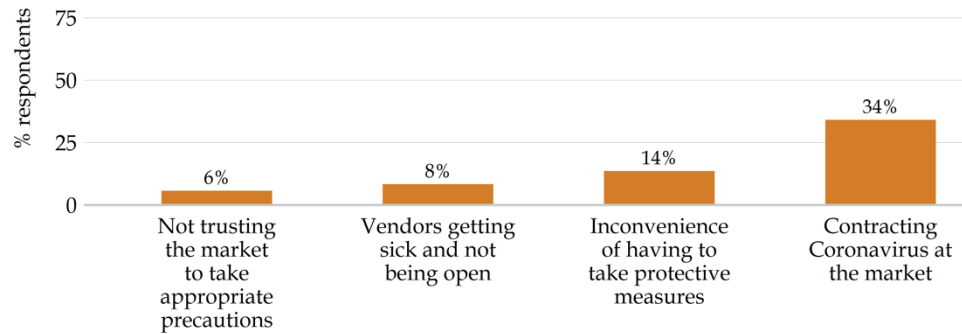


Fig. 3 Consumers: Greatest concerns when shopping at the market in the last 2 weeks

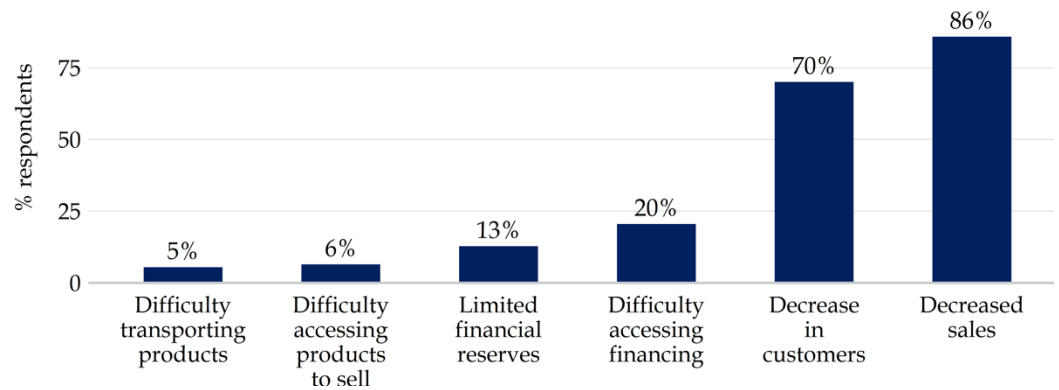


Fig. 4 Vendors: Immediate impact on business due to COVID-19

### 3. MARKET RESILIENCE UNDER COVID-19

This TMR highlights two new data sets from February and March and compares them to the January results from the first TMR. Data was collected through monthly panel interviews with 30 vendors and 30 consumers from both Bonolota wet market and Islambagh City Corporation wet market. Food prices for this report have been assessed between 29 November 2020 and 23 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.



Since January 2021, almost all vendors have been reporting a decrease in customers (97% Jan; 100% Feb; 100% Mar). While no comparing numbers exist from the time pre-COVID-19, a slight decrease in the number of customers on a typical day can also be observed between January and March (Fig. 6). By March, the share of vendors reported to have 26-35 customers increased to 27% while the share of vendors with more than 50 customers decreased to 47%.

At the same time, the number of suppliers from which vendors purchased their goods has changed. Fig. 5 shows that the share of vendors relying on only one supplier decreased (30% Jan; 20% Feb; 7% Mar). At the same time, the share of vendors relying on 2-3 suppliers increased (27% Jan; 47% Feb; 50% Mar). Those relying on more than seven different suppliers also increased slightly (27% Jan; 30% Mar). In March, major reasons for any changes in the supplier(s) were high prices, seasonality, and personal reasons.

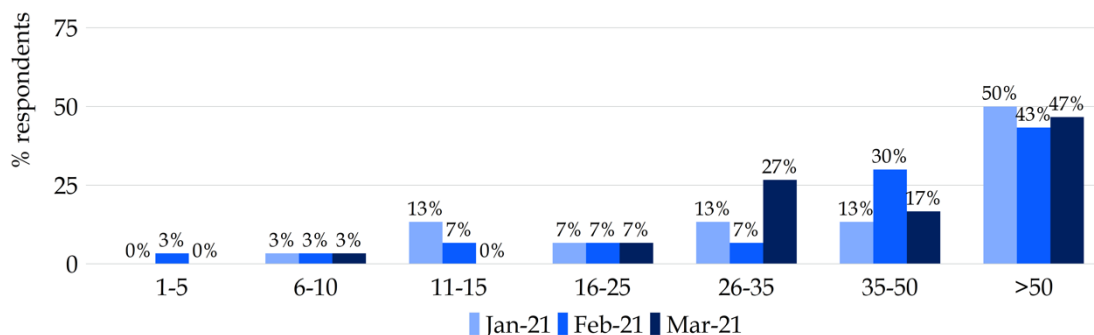


Fig. 6 Vendors: Number of customers on a typical day

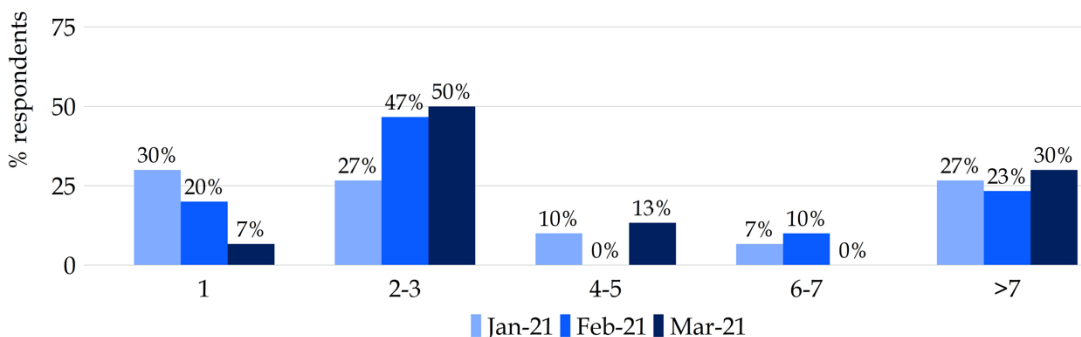


Fig. 5 Vendors: Number of different suppliers, last month

### 3.2 Diversity

**Diversity** has multiple dimensions, including (1) the amount of variation in a system (including the frequency and purpose of visiting the markets from consumer perspective) and (2) the balance between different types (e.g., 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 is analyzed based on the vendors' observations regarding number and changes in the commodities sold and consumers' shopping behavior.

The number of different products sold did not change substantially (Fig. 7). In March, most vendors sold one product (57%) or more than 30 (20%) different products in their businesses. None of the vendors reported changing the products sold in their business in the last month. Fig. 8 shows that between January and March, the frequency of visiting the markets shifted

slightly. about one third (31%) of the consumers went shopping daily, 24% two to three times a week and 14% once a week. Almost all consumers (97% Jan; 97% Feb; 93% Mar) said the purpose for visiting the market was to buy foods or other goods for themselves or their own family; 7% (Mar) of consumers also went to the market to buy foods or other goods for their own business.

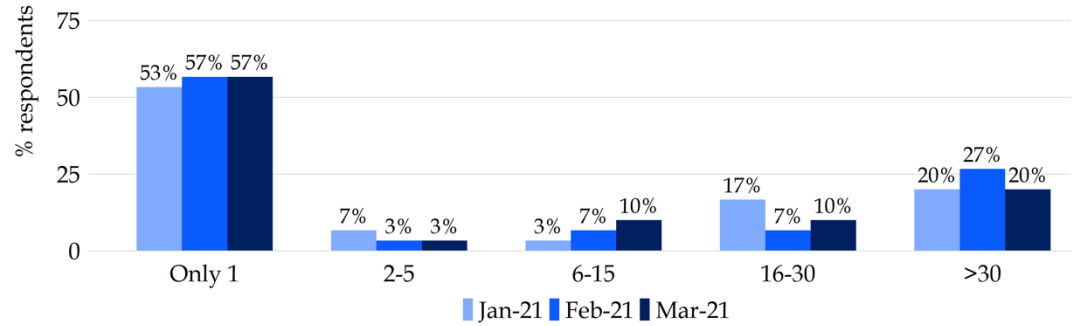


Fig. 7 Vendors: Number of different products sold

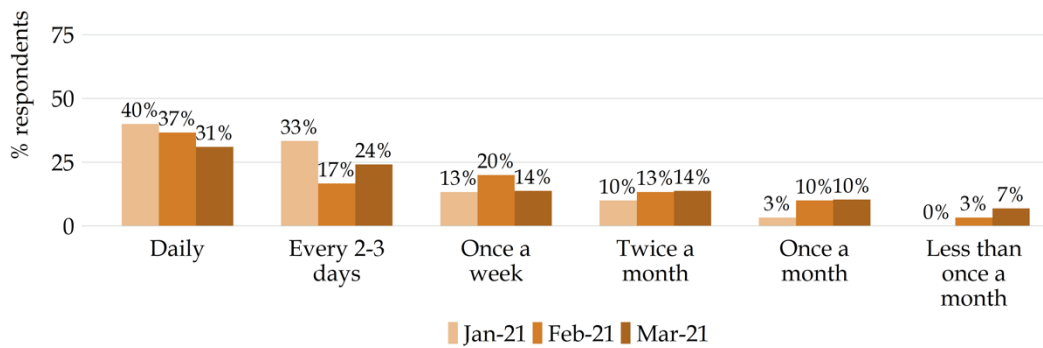


Fig. 8 Consumers: Frequency of visiting the markets

### 3.3 Equity and fairness

From a systems perspective, **equity and fairness** refers to the level or degree of equality and fairness inherent in formal and informal rules and laws. The panel of vendors were asked how difficult it was for them to follow the new rules and regulations put in place due to COVID-19. Between January and March, it became

less difficult for most vendors following new rules and regulations (Fig. 9). The share of vendors that found it **not** difficult at all to follow the COVID-19 rules, including basic hygiene, social distancing, and implementing the "No mask, no service" policy in the market space increased (60% Jan; 97% Feb/Mar).

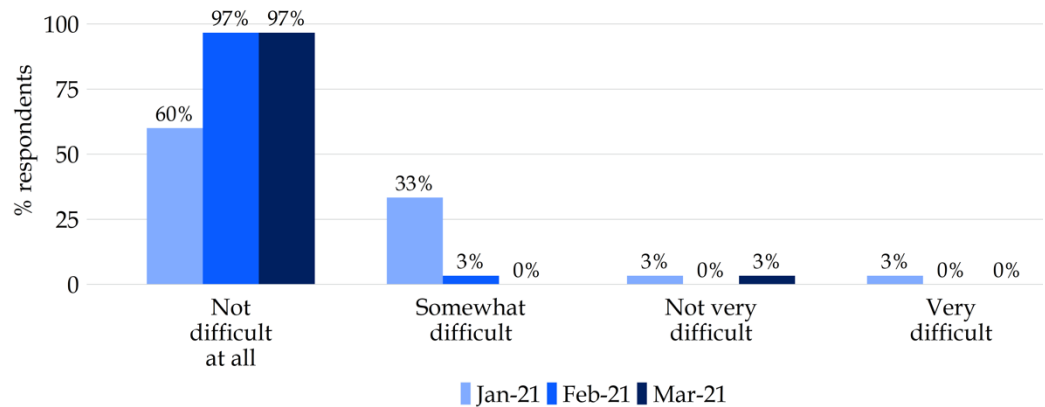


Fig. 9 Vendors: Difficulty following COVID-19 rules

### 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. In this assessment cooperation was measured asking vendors if they have started sharing resources with other businesses due to COVID-19.

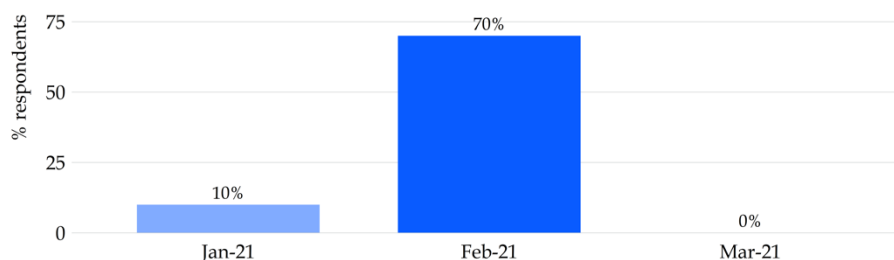


Fig. 10 Vendors: Started sharing resources with other businesses

Between January and March, the share of vendors started sharing resources with other businesses changed significantly (10% Jan; 70% Feb; 0% Mar; Fig. 10). Those that shared resources in February shared new hand washing facilities (86%) and sanitizers (33%).

### 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 where they buy their food from.

Between January and March, none of the vendors in this panel reported that they changed their own business practices based on competitors. In contrast, in the same quarter consumers reported changes to the food items typically bought and places where they obtained food from including markets. Between January and March, the share of consumers that reported changes to the food items typically bought increased (57% Jan/Feb; 72% Mar). Throughout all three months the major changes mentioned were an increased quantity of purchased food items, including meat, fish, vegetables, and fruits. Further to this, the two markets under assessment here were still the most common places where consumers obtained food despite a 13% decrease (87% Jan; 80% Feb; 76% Mar) in the share of consumers that reported doing most of their food shopping at the market. As of March, other places where consumers obtained food from were other open-air markets (41%), food vans (10%), food stalls (7%), supermarkets (7%) or small shops (3%).

The reasons for buying food at the two markets were similar during the three rounds. In March, all consumers stated as their main reason the good selection of food, good quality/freshness of food (79%), convenience/easy reach from home (72%), and good prices (38%). The share of consumers mentioning "good prices" as a reason decreased by 24% from January to March (Fig. 12).

The level of trust for the vendors that consumers bought food from has overall slightly decreased between rounds. Although the share of consumers that consider vendors as extremely trustworthy increased (7% Jan; 21% Mar; Fig. 11), the share of consumer that considered the majority of vendors trustworthy, decreased from 70% to 41%, and the share of consumers that found only a few vendors trustworthy increased from 10% to 21% in March 2021.

For those consumers that describe the vendors as majorly trustworthy or extremely trustworthy in March, the reasons included knowing the vendors well/buying regularly from the same vendors (100%) and the proximity to their home (44%). Good quality/freshness of products was not mentioned at all by consumers in March, while 70% of consumers had stated the reason in January. For those

consumers that only described a few vendors as trustworthy or not at all trustworthy, major reasons included not knowing the vendor well (91%), changing prices (36%), or the vendor using different business methods (18%) in March. The slight decrease in the level of trust was also reflected by a shift in vendor loyalty. Fig. 13 depicts that in January 43% of consumers stated to usually buy from the vendors they know, while in March the share decreased to 10%. Over the same period, the share of consumers that went back to the same vendors occasionally or rarely without paying attention increased by 11 percentage points and 18 percentage points, respectively.

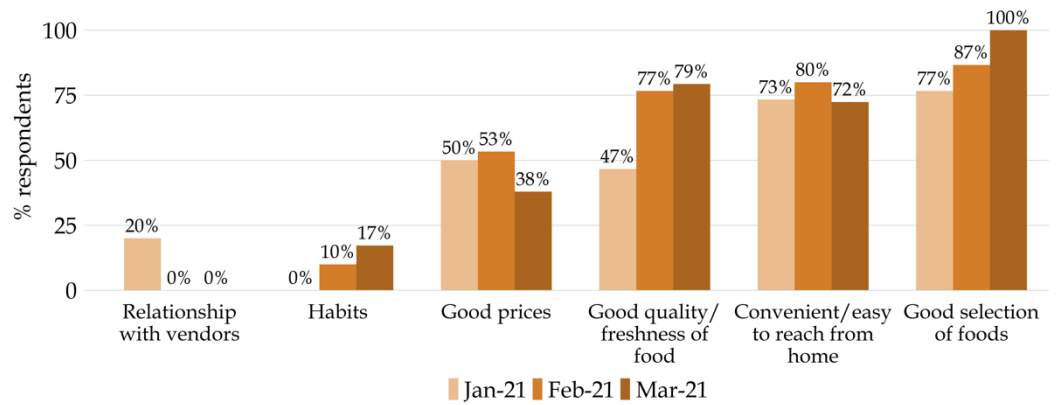


Fig. 12 Consumers: Reasons for visiting markets

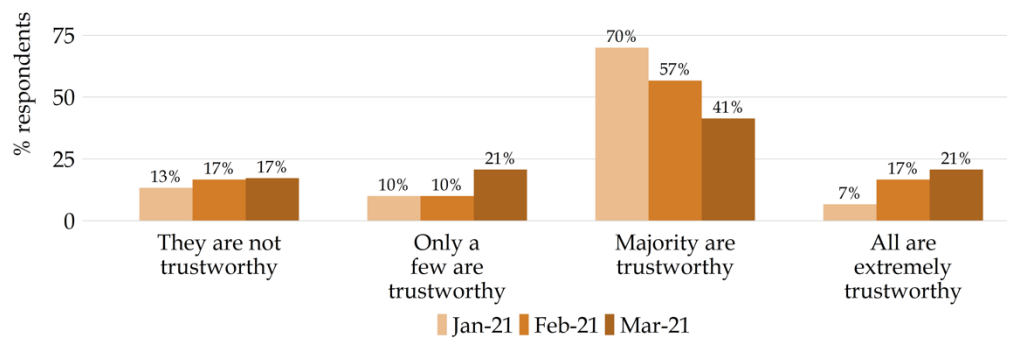


Fig. 11 Consumers: Level of trust for the vendors they buy food from

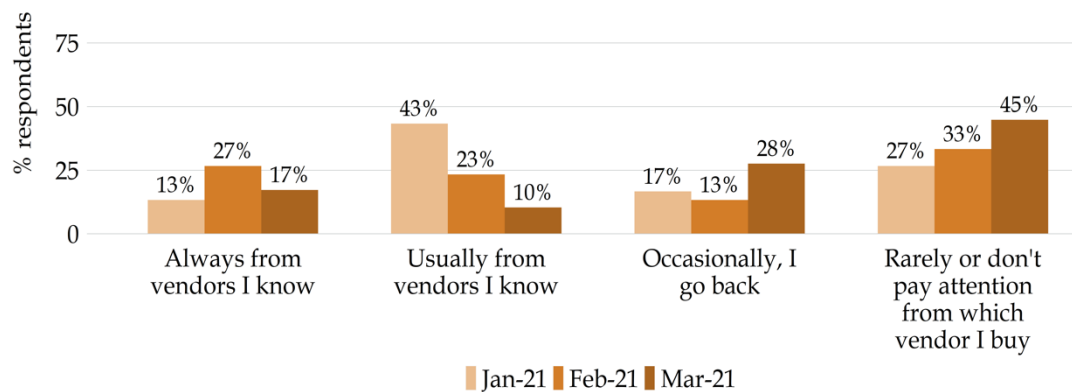


Fig. 13 Consumers: Frequency of buying at the same vendor



### 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.

While the share of vendors being aware of business support that the market offered due to COVID-19 (including information, awareness and sometimes provision of masks) increased (73% Jan; 100% Mar), none of the vendors have used any business strategies to increase the number of customers and sales. The share of vendors that borrowed money due to unexpected expenses during COVID-19 increased (47% Jan; 53% Feb; 73% Mar). The sources for

this money were diverse but similar over the months; vendors relied on relatives, informal cooperatives, banks, and friends (Fig. 14). Between January and March, none of consumers have been asked by market officials or vendors to provide feedback.

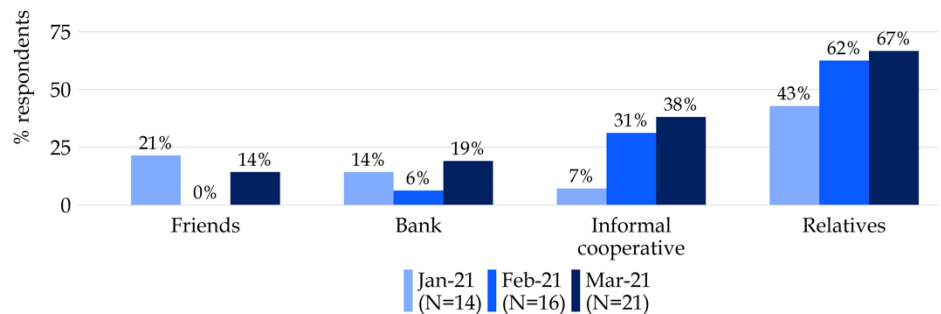


Fig. 14 Vendors: Source of borrowed money due to COVID-19

## 4. FOOD PRICES

Tracking food prices allows market stakeholders to assess supply and demand of particular foods in the market. In this assessment, prices of different nutritious commodities and food groups have been tracked over time in BDT.<sup>2</sup> The food prices for pulses (chickpeas and lentils) changed slightly (Fig. 15). While prices for chickpeas increased (3%), prices for lentils decreased (2%) from Nov-20 to Mar-21. The trends were similar for Jan-Mar 21. The weekly retail food

prices collected by the [Trading Corporation of Bangladesh \(TCB\)](#) for Dhaka city do not show any price changes for lentils between Nov-20 and Mar-21 or Jan- and Mar-21, however, a price increase of 7% and 2% for chickpeas (mug dal, Manvede), respectively could be observed over the same time period.

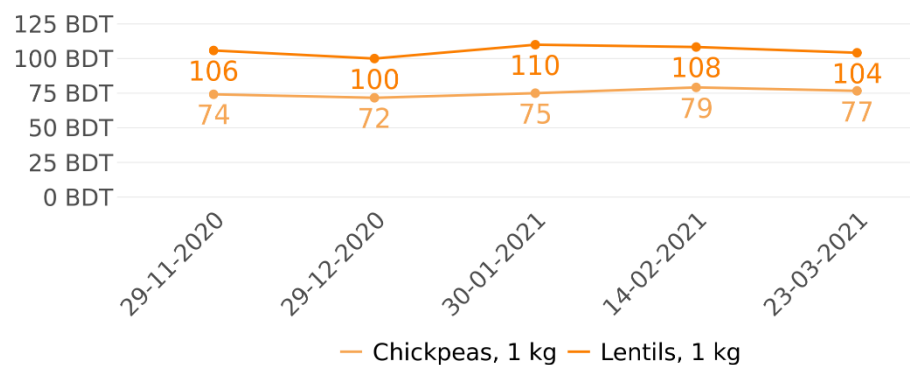


Fig. 15 Prices for selected pulses, in BDT/kg

<sup>2</sup> As of 23 March 2021, [100 BDT  \$\cong\$  1.18 US\\$](#).

Vegetable prices for this report were assessed from green papaya and red amaranth (Fig. 17). While between Nov-20 to Mar-21 prices for both vegetables remained almost unchanged (green papaya +2%; red amaranth +1%), due to seasonality and other constraining factors prices were about 30% (green papaya) and 18% (red amaranth) higher in January 2021.

Under the group of animal source foods, prices for fresh fish (Rui, locally named as *Nola*), eggs and sour yoghurt were assessed (Fig. 17). While the price for a dozen of eggs decreased by 6% from Nov-20 and Mar-21, the prices for fish and sour yoghurt increased by 7% and 31%, respectively. While the

price trends between Jan to Mar were the same for fish and sour yoghurt, prices for eggs showed an increase of 6% between the last three months since Jan. The official statistics for eggs also revealed a decrease in the price for eggs (sold in pack of 4) between Nov-20 and Mar-21 of 11%. Although this assessment cannot be directly compared to the official statistics for Dhaka city, which includes retail prices from over a dozen markets in the city, the overall price development for those commodities highlighted here seem comparable.

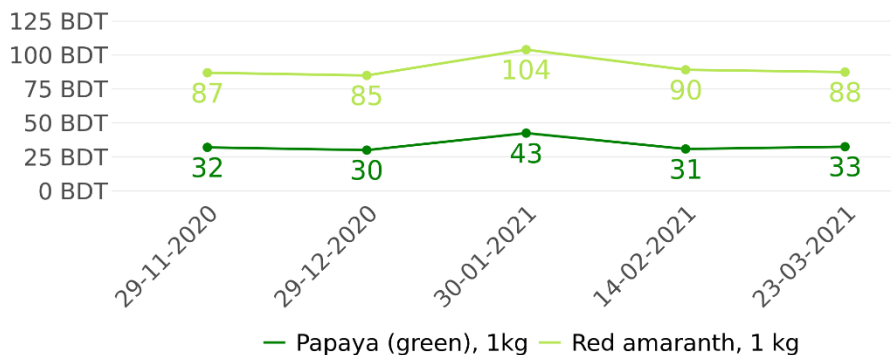


Fig. 17 Prices for selected vegetables, in BDT/kg

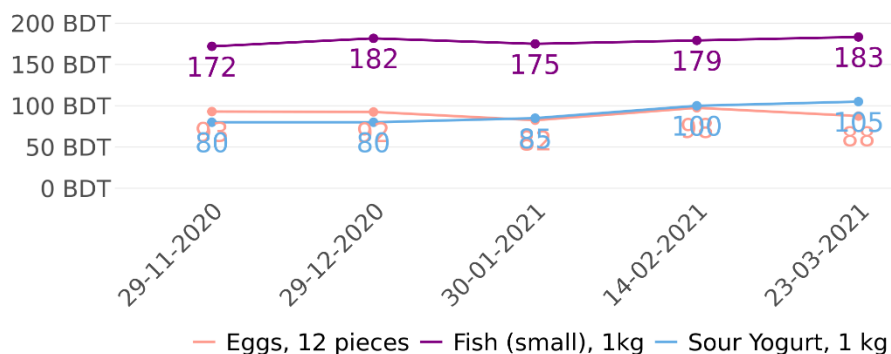


Fig. 17 Prices for eggs, fish, and sour yoghurt in BDT

## 5. CHARACTERISTICS OF RESPONDENT SAMPLE

### VENDOR (n=30)

- All vendors in this panel are male (Tab. 1 Characteristics of respondents in this panel)
- 40% of vendors have primary education; 13% have never attended school.
- Most vendors sold packaged foods (branded products or pre-packed items like legumes or sugar), vegetables, meat, poultry, and fish.
- 73% of vendors have been operating in the market for 10 years or longer; 93% operate in small shops.
- As of March 2021, 97% of vendors aim to continue with their business even if COVID-19 continues.

### CONSUMER (n=30)

- 73% of the consumers in this panel are male; most are in the age groups 25-30 and 31-40 years of age.
- 53% of consumers had attended higher education; 13% have not attended school.
- 57% of consumers lived in Dhaka for over 10 years.
- In March, 76% of consumers were financially affected by COVID-19; all of those negatively affected reported a reduced income through loss of job; 77% of those negatively affected relied on savings to cope with the situation

Tab. 1 Characteristics of respondents in this panel

	VENDOR (n=30)	CONSUMERS (n=30)
Gender (male   female)	100%   0%	73%   27%
<i>Age group</i>		
18-25 years	13%	13%
26-30 years	17%	30%
31-40 years	23%	30%
41-50 years	20%	10%
51-65 years	17%	10%
66-75 years	7%	3%
>75 years	3%	3%
<i>Highest level of school attended</i>		
Primary school	40%	17%
Secondary school	23%	17%
Higher education	23%	53%
No school attended	13%	13%
<i>Length of operating in the market (vendor)   living in Dhaka (consumer)</i>		
<1 year	7%	7%
1-3 years	3%	7%
3-5 years	7%	3%
5-10 years	10%	27%
>10 years	73%	57%

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

Insights into **market system resilience** was based on interviews of 30 consumers and 30 vendors from two traditional markets in Dhaka, who were interviewed between 7 January and 25 March 2021.<sup>3,4</sup> The panel of vendors and consumers was purposefully selected from Bonolota and Islambagh City Corporation wet markets in Dhaka in December 2020 and January 2021. 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 were 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.

<sup>3</sup> The panel included 30 consumers in January and February, due to attrition the panel size was only 29 in March.

<sup>4</sup> Due to unavailability of respondents three interviews for the round in March were taken on 10 and 11 April.

In addition to data on market system resilience, this report conducted a **rapid assessment** from 1,042 consumers and 1,042 vendors from Bonolota and Islambagh City Corporation wet markets. Approximately every two weeks, 40 consumer and 40 vendors in each market were randomly selected for surveys. All assessments combined responses from the vendors and consumers in both markets, and 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 1 September 2020 and 14 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 on 19 November, 29 December 2020, 30 January, 14 February and 23 March 2021. Foods were selected based on its nutritive value, availability, and cultural acceptance. Data for foods were collected in standard units (kilogram or pieces), and prices were averaged using BDT ([100 BDT  \$\cong\$  1.18 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 a direct comparison between the assessed commodities and official price statistics for Dhaka by the [Trading Corporation of Bangladesh \(TCB\)](#) is not possible, EatSafe tracked and compared official price data with the average monthly prices of this assessment, allowing for validation of these data.

## 7. GAIN'S 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 safely**
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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