



RAPID MARKET RESILIENCE ASSESSMENT 2020: FINAL REPORT ROUND 1 AND 2

Timor-Leste

08 SEPTEMBER 2020



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Foreword

The agricultural sector is very important to the economy of Timor-Leste and the livelihood of our people. The mandate of the Ministry of Agriculture and Fisheries (MAF) is to have a competitive and prosperous agricultural sector that will significantly and sustainably contribute to the Gross Domestic Product (GDP), eradication of poverty, food insecurity and undernutrition of the country. However, investments in agriculture at a national, community and household level have been significantly challenged during the 2019/2020 cropping season. This period saw the arrival of both longstanding and new shocks, including crop pests (such as Fall Armyworm), livestock disease (such as African Swine Fever), variable rainfall and the COVID-19 pandemic.

The impact of these shocks on households and market actors was unknown, resulting in the need for both a MAF led Rapid Food Security Assessment, focused on households, and a Rapid Market Resilience Assessment, focused on market actors. This Rapid Market Resilience Assessment was designed to gather data on the impacts of COVID-19 restrictions as well as on recent agricultural shocks such as crop pests, livestock and poultry diseases, and variable rains on market actors throughout Timor-Leste. Data was collected over two rounds, in late May 2020 and then in early July 2020, which means that this assessment provide a unique snapshot of resilience and adaption during this period.

The Rapid Market Resilience Assessment was led by MAF with the support of partners Mercy Corps, Oxfam and the World Food Programme, through investments from the United States Government and the Australian Government. The findings highlight the significant impacts resulting from agriculture and COVID-19 shocks, as well as the strong and rapid adaptations of market actors who are critical to ensuring food security communities in Timor-Leste.

I take this opportunity to express my gratitude for the collaboration between the National Directorate for Food Security and Cooperation of the Ministry of Agriculture and Fisheries, and the National Directorate of Statistics and Social Economy of the Ministry of Finance for their leadership and commitment to carry out this assessment in order to fill the existing evidence gap on the magnitude of the impact of recent shocks.

My sincere appreciation also to the United States Government and the Australian Government for their support of this survey, as well as to lead partners Mercy Corps, Oxfam and WFP. Additional thanks are extended to CRS who supported data collection.

The evidence gathered within this assessment indicates that while many aspects of the situation have improved during the May - July period, a substantial part of Timor-Leste's business community are facing financial effects from the COVID-19 restrictions. Profits are reported to be low despite a trend of customers returning to shops, and supply and transport difficulties are still faced by many business owners. Encouragingly, the provision of information on COVID-19 is widespread in the Timorese business community, with most feeling well informed and satisfied with the quality of information they have received. Material support for both households and businesses is increasing. The trend of decreasing precautions taken by local businesses is not unexpected given the end of the State of Emergency and easing of immediate concern around COVID-19 in Timor-Leste, but ought to be monitored as the COVID-19 crisis continues around the world. I hope that the findings will inspire national and subnational efforts for joint policies and actions, as well as collaborative efforts for future comprehensive data collection and monitoring systems, thereby building resilient livelihoods that help eradicate food insecurity.

Dili, 8 September 2020



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Acknowledgements

This nationwide 2020 Rapid Market Resilience Assessment of Timor-Leste is led by the Department of Food Security, Ministry of Agriculture and Fisheries, with lead agency support from Mercy Corps, Oxfam and WFP. It is the result of a truly collaborative effort. Special thanks to the agencies who supported data collection across Timor-Leste: CRS, Mercy Corps and Oxfam. Additional thanks are extended to the following agencies for their technical contributions: Food and Agriculture Organization of the United Nations, World Food Program, Mercy Corps, Oxfam, TOMAK and World Vision. Analysis and the development of this report have been conducted by Joseph Freach, independent consultant, and Katherine Dobson, Mercy Corps' Director for Monitoring, Evaluation, Research and Learning.

The authors would like to thank the enumerators, local partners, project field staff, translators, and drivers who made completion of this report under an extremely tight timeframe possible. Thanks are also extended to the Ministry of Agriculture and Fisheries and partner organizations for their support and feedback throughout the process.

The Assessment was made possible by the generous support of the American people through the United States Agency for International Development (USAID) and United States Department of Agriculture (USDA), and the generous support of the Australian Government through the NGO Cooperation Program. The contents are the responsibility of the Ministry of Agriculture and Fisheries and do not necessarily reflect the views of USAID, USDA, the United States Government or the Australian Government.

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Executive Summary

This report presents the findings of the 2020 Timor-Leste nationwide Rapid Market Resilience Assessment. The assessment gathered information on the effects of COVID-19 restrictions as well as on recent agricultural shocks such as crop pests, livestock and poultry diseases, and variable rains on market actors throughout Timor-Leste to inform government and development sector responses. Two rounds of data were collected, the first between 21 - 27 May, 2020 and the second from 3 - 13 July, 2020. The same businesses were surveyed at two different points of time in order to capture change in a rapidly shifting and potentially volatile situation. COVID-19 health and safety protocols were respected at all times, including physical distancing, use of face masks, and regular hand washing. The assessment gathered information on the effects of COVID-19 restrictions, as well as recent agricultural shocks such as crop pests, livestock and poultry diseases, and variable rains, on agricultural input, agricultural output, and basic hygiene and cleaning supplies businesses throughout Timor-Leste. The full results from the assessment are summarized herein, and this report supersedes a preliminary, rapid assessment version released on 19 June, which covered only Round 1 data.

A total of **178 respondents** participated in Round 1 of this assessment, and **152 respondents** in Round 2. Businesses that responded in Round 1 were invited to participate in the Round 2 survey six-weeks after the initial survey. These respondents represented 18% Female, 30% Male, and 35% jointly (male/female) owned businesses. A purposive (intentional) sampling approach was used. Businesses from **every municipality of Timor-Leste** were surveyed. Businesses employing a staff member with a disability made up 3% of the sample, and 50% of surveyed businesses were micro 'last mile' establishments.¹

This nationwide Rapid Market Resilience Assessment of Timor-Leste is led by the Department of Food Security, Ministry of Agriculture and Fisheries.

Key Findings

- **Businesses are returning to normal operations:** In May, 3% of surveyed businesses had closed due to challenges and restrictions but 44% reported operating at reduced hours/capacity. By July, 95% of re-surveyed businesses were open and operating at normal capacity.
- **Despite improvements in their ability to operate, many businesses are still under financial strain following the COVID-19 State of Emergency:** In Round 2, 68% of businesses reported decreased profit and 21% said that costs have increased due to COVID-19 and agricultural/environmental shocks. 26% of businesses reported reduced customer numbers, and 53% reported being affected because customers are buying less food.
- **The strain on businesses is still affecting workers:** In May, 57% of surveyed businesses reported that they or their staff were working reduced hours, 28% reported reduced incomes for their staff, and 10% had decreased staff (by an average of 3 members) in the past 2 months. By July, the businesses working less hours had dropped to 23%, but 21% still reported less income for their staff members. Only 2% of surveyed businesses were recruiting or had plans to recruit new staff.
- **Supply challenges are improving but there are some ongoing effects on businesses' ability to operate:** The number of businesses reporting that they could access goods in the quantities they needed jumped considerably from 51% in Round 1 to 75% in Round 2. However, in July, 60% of businesses said that they were impacted by their suppliers' inability to import goods. The percentage of businesses unable to access goods at the quantities needed dropped from 32% to 11% between

¹ For the sake of brevity, these are Round 1 figures but the Round 2 demographic figures were nearly identical.

May and July, but while the percentage of businesses able to transport all stock to their municipal locations increased from 13% to 24%, this still represents less than one quarter of all businesses.

- **Businesses continue to be affected by agricultural/environmental shocks:** In May, between 6% and 30% were affected 'a lot' by any one of the agricultural/environmental shocks included in the survey. By July, 20% to 52% of businesses experienced effects of shocks at this level.² For all shocks, micro sized businesses were the most affected.
- **Grains – mainly rice – are subject to price and supply issues:** In May, 41% of businesses that normally stocked grains reported not being able to get them in the volume needed, 46% said the price of grains had increased. Round 2 clarified that much of the reported effect among surveyed businesses applied to imported rice. In July, 36% of businesses reported that they were unable to source rice at all or in the quantities they needed, 67% said that the price of rice had increased, and among those reporting rice shortages, 50% said that they would run out of rice in the next 7 days.
- **Maize is the crop most affected by agricultural/environmental shocks and stressors in both rounds of data collection:** 44% of Round 1 and 53% of Round 2 respondents reported that their maize crops have been affected. Maize is a staple of great importance for food security.
- **Transport is a challenge for businesses:** In May, 50% of businesses reported that they could 'only transport some' or 'could not transport any' stock from Dili to municipal locations, and this remained at 44% in July.
- **Demand for goods is returning to normal:** In May, 46% of businesses reported a decrease in demand for goods, but in July only 15% of respondents felt that demand was at decreased levels. The percentage of respondents reporting a reduction in customer levels dropped from 78% to 20% between the two data collection rounds. The customer demographic most often observed to be buying less in Round 1 were elderly people, but this group had the largest increase of 'buying more' responses of any demographic in Round 2.
- **COVID-19 information is available, useful, and trusted:** All (100%) respondents in both rounds reported having received information on COVID-19 and 100% of Round 2 respondents said that this information has helped them to understand/prepare for COVID-19. In total, 96% of Round 1 respondents received information via television, 53% from Facebook, 46% from community leaders, and 43% from radio, with similar percentages in Round 2. When asked about their level of trust in the information they received, 99% of Round 2 respondents said they 'always or mostly' believed the messages they received.
- **Fears about COVID-19 are subsiding, and uptake of precautions is decreasing:** When questioned about the impact of COVID-19 restrictions on their businesses in May, 36% of surveyed businesses were worried about interacting with customers, 29% reported police closing their businesses, and 17% reported staff not attending work. By Round 2, these had dropped to 27%, 11%, and 7% respectively. Between the two rounds of data collection, the percentage of businesses decreased for all precautions including from 73% to 58% setting up hand washing stations, 48% to 28% requiring masks, and 47% to 36% requiring physical distancing.
- **Businesses are receiving more support:** The incidence of businesses not receiving support from a business organization or network was stable at 69% between May and July, but the percentage of those receiving government support increased from 10% to 43%. 80% of respondents had personally received the GoTL's \$100 COVID-19 household payment.

² The increase is partly due to this question being made required in Round 2. In Round 1, there were 53 non-responses to this question.

Introduction

This report outlines the results and findings from the 2020 Rapid Market Resilience Assessment, which gathered information on the effects of COVID-19 restrictions as well as on recent agricultural shocks such as crop pests, livestock and poultry diseases, and variable rains on market actors throughout Timor-Leste. Two rounds of data collection occurred to capture the change in the situation over time, with the first taking place in late May 2020 and the second in early July 2020. This report covers both rounds of data collection and the final analysis, and supersedes a preliminary version released on 19 June, 2020 as a rapid assessment report upon the completion of Round 1 data collection.

The 2020 Rapid Market Resilience Assessment, which is focused on market actors, is intentionally designed to complement the 2020 Rapid Food Security Assessment, which surveyed households representatives throughout Timor-Leste's 13 municipalities.³

Methodology

Rapid Market Resilience Assessment data was collected through structured surveys with business representatives in each municipality throughout Timor-Leste. Surveys were conducted in-person, by trained, locally-based data collection partners. COVID-19 health and safety protocols were respected at all times, including physical distancing, use of face masks, and regular hand washing. Surveys were conducted in Tetun, with supporting use of local languages where it was appropriate. Data collection partners recorded participants' responses digitally, using the ONA/ODK application on tablets or smart phones.

A purposive (intentional) sampling approach was used in order to balance the need to rapidly collect accurate data in order to inform Government of Timor-Leste and agency responses, with the desire to have nationwide representation and robust, credible and reliable findings. Purposive sampling is a technique that is widely used in research and involves identifying and selecting businesses that are experiencing a phenomenon of interest, based on specified selection criteria.⁴ In this assessment, the use of purposive sampling meets the information needs of key stakeholders and provides a solid snapshot of the market resilience in Timor-Leste. It is not however, a probabilistic or random sampling approach. As such, findings are not intended to be generalized and comparisons between municipalities should be interpreted with care.

Data collection partners short-listed market actors based on four criteria: location, product focus, business size and business nature/function.

- 1) **Location:** Businesses from each of Timor-Leste's 13 municipalities were intentionally included. Data collection partners were asked to survey some businesses in each municipality, with business in Dili intentionally over-represented.

³ Ministry of Agriculture & Fisheries, Mercy Corps & Oxfam (2020). *Rapid food security assessment 2020: Timor-Leste*. Dili, Timor-Leste : MAF.

Results from the 2020 Rapid Food Security Assessment have been released as a full report and brief.

⁴ Creswell, J.W. & Plano Clark, V.L. (2011). *Designing and conducting mixed methods research* (2nd ed.). Thousand Oaks, CA : Sage Publications.

Patton, M. Q. (2002). *Qualitative research and evaluation methods* (3rd ed.). Thousand Oaks, CA : Sage Publications.

- 2) **Product focus:** Data collection partners were asked to identify and approach a mix of market actors who trade in three types of products: (i) agricultural inputs, (ii) agricultural outputs / food (fresh or packaged), and/or (iii) basic hygiene and cleaning items.
- 3) **Business size:** Data collection partners sought to survey businesses of varying sizes, including: (i) major dealers/retailers (larger businesses that are often Dili-based), (ii) secondary dealers/retailers (small size businesses that are often municipality-based), and (iii) last mile actors (micro businesses that are municipality-based and are often located outside a major town). Micro shops / kios businesses were targeted as the last mile actors; market stall sellers are not included in this sample.⁵ For analysis purposes, businesses were categorized by their number of employees as follows: micro (0-2 employees), small (3-5 employees), and larger (>5 employees).
- 4) **Business nature/function:** Data collection partners sought to include a mix of importers, producers, aggregators and retailers within the businesses they approached for survey.

Businesses that meet the above stratification criteria were identified. In some instances, survey times were scheduled. In other cases, business representatives choose to participate in a survey at the time the data collection partner first approached them. Surveys took place at business premises. Respondents in the first round of data collection were asked whether they would be willing to participate in a second survey to document any changes in the situation over time, and 152 of those who agreed were re-surveyed approximately six weeks later. Some additional questions were added to the Round 2 survey questionnaire, and some minor changes were made to others to improve clarity. These are noted throughout this report. Also noted are instances where the time period in a question was changed in Round 2, as some questions asked participants to respond based on their situation in the 6 weeks between data collection visits.

A Note on the Tables

The tables in this report have been presented to show the impact of various factors on each size of business, rather than what proportion of each type of business reported each factor. Percentages in **bold** refer to total respondents from each round unless otherwise noted, and percentages in plain text represent the number of responses for the relevant business size as a percentage of the total respective sample. The percentages against each business size also sum to the total bold row for each response or factor. When interpreting tables, it is important to note the representation of each business size from Table 2. Where relevant, the percentage of a particular business size affected by a particular factor is included in the text.

Where demographic information was similar between both rounds, only Round 1 data is presented in the tables and this is noted in the adjacent text. For other tables, captions denote whether data from Round 1, Round 2, or both are presented. Throughout the text and tables, Round 1 is denoted R1, and Round 2 is denoted R2. Figures of interest in the tables are highlighted in yellow throughout the report.

⁵ For analysis purposes the total number of employees has been used to define business size. For sampling purposes, a broader definition was used.

Business Type

A total of **178 businesses** participated in the first round of survey data collection, and **152 were re-surveyed** six weeks later. In Round 1, the surveyed businesses were most commonly jointly female/male owned businesses (35%), followed by male-owned businesses (30%) and female-owned businesses (18%).⁶ There was nearly identical representation in Round 2. Overall, 81% of businesses were formally registered, with the remainder being informal, unregistered businesses. While COVID-19 related travel restrictions and severe weather conditions made data collection difficult in some areas, at least 7 businesses from each municipality were surveyed in Round 1. Table 1 shows the locations of respondent businesses across Timor-Leste. The distribution of businesses across Timor-Leste's municipalities were approximately the same in Round 1 and Round 2, except that difficult conditions resulted in respondents from Lautem making up only 1% of the Round 2 sample.

TABLE 1. BUSINESS LOCATION (R1 & R2)

Municipality	Round 1		Round 2	
	n	%	n	%
Aileu	15	8%	15	10%
Ainaro	15	8%	15	10%
Baucau	7	4%	6	4%
Bobonaro	13	7%	13	9%
Covalima	16	9%	15	10%
Dili	30	17%	25	16%
Ermera	15	8%	11	7%
Lautem	11	6%	1	1%
Liquica	15	8%	14	9%
Manatuto	15	8%	11	7%
Manufahi	11	6%	11	7%
Oecusse	8	4%	7	5%
Viqueque	7	4%	6	4%
Total:	178	100%	152	100%

While micro, 'last mile' businesses made up a substantial portion of the sample, the **size of respondent businesses varied greatly**. Half of the Round 1 surveyed businesses had 0-2 employees⁷, 25% had 3-5 employees and 25% had more than 5 employees. Overall, 11% of businesses were sole traders (no employees), and **the largest business interviewed had 168 employees**. The proportions of business sizes were very similar for Round 2. **Disaggregated analysis by business size is provided throughout the report, based on the classifications found in Table 2.**

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⁶ The remainder of surveyed businesses opted not to specify the sex of their owner.

⁷ This question read: "How many staff/employees work at your business? (Please include both full time and part time staff.) Please include owner/manager as well as full and part time workers" but many sole-trader respondents interpreted it as having 0 employees.

TABLE 2. BUSINESS SIZE (R1 & R2)

No. employees	Classification	Round 1		Round 2	
		#	%	#	%
0 to 2	micro	88	50%	82	54%
3 to 5	small	45	25%	34	22%
Over 5	larger	45	25%	36	24%
Total		178	100%	152	100%

In Round 1, only 3% of businesses had added staff in the past 2 months (by an average of 1.5 staff members) while **10% had decreased staff** (by an average of 3 members). In Round 2 (six weeks later), most businesses still had the same number of employees with 5% adding staff members in the previous 6 weeks (by an average of 2) and **a further 5% decreasing staff members** (by an average of 1.6) during that time. The rates of increases and decreases to staff level did not differ according to business size.

Table 3 shows the types and natures of surveyed businesses. 'Agricultural outputs/food' was the most common business type, and 75% of respondents classed their businesses as a *loja* or *kios*. It is also interesting to look at the combined business activities undertaken by respondents. As outlined in Figure 4, nearly half (46%) of businesses were combined, falling into more than one category. The majority (79%) were dedicated retailers, and a further 15% were retailers combined with a business of a different nature. The distribution of the size of surveyed businesses across the municipalities can be found in Figure 2.

TABLE 3. TYPE AND NATURE OF SURVEYED BUSINESSES (R1 & R2)

Business attributes	Round 1		Round 2	
	#	%	#	%
Business type				
Agricultural inputs	42	24%	33	22%
Agricultural outputs / food (fresh or packaged)	135	76%	114	75%
Basic hygiene and cleaning items (outputs)	96	54%	82	54%
Nature of business				
Aggregator	25	14%	21	14%
Importer	14	8%	11	7%
Retail - wholesaler	9	5%	6	4%
Retailer - supermarket / major dealer	36	20%	23	15%
Retailer - loja / kiosk	133	75%	120	79%
Producer	3	2%	1	1%
Other	8	4%	9	6%

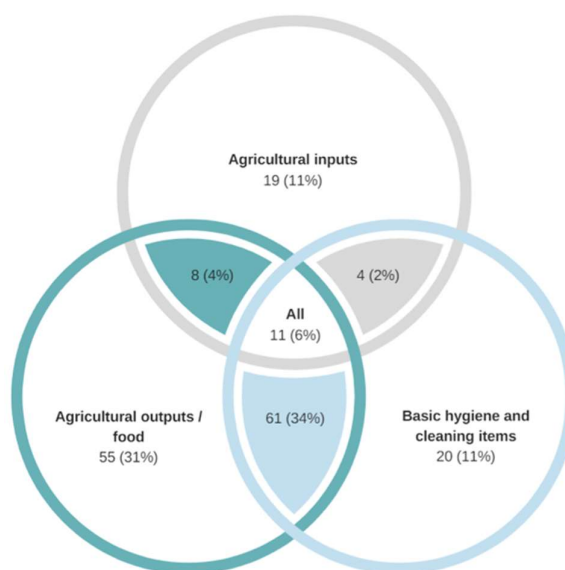


FIGURE 1. TYPE OF BUSINESSES (COMBINED) R1

TABLE 4. TYPE AND NATURE OF BUSINESSES (COMBINED) (R1)

Type and nature of businesses (combined)	#	%
Type of business (combined)		
Agricultural outputs / food (fresh or packaged) AND Basic hygiene and cleaning items	61	34%
Agricultural outputs / food (fresh or packaged)	55	31%
Agricultural inputs	19	11%
Basic hygiene and cleaning items	20	11%
Agricultural inputs AND Agricultural outputs / food (fresh or packaged) AND Basic hygiene and cleaning items	11	6%
Agricultural inputs AND Agricultural outputs / food (fresh or packaged)	8	4%
Agricultural inputs AND Basic hygiene and cleaning items	4	2%
Total	178	100%
Nature of business (combined)		
Retailer	141	79%
Aggregator AND Retailer	15	8%
Importer AND Retailer	9	5%
Aggregator	6	3%
Importer AND Aggregator AND Retailer	3	2%
Importer	1	1%
Producer AND Aggregator	1	1%
Producer AND Importer	1	1%
Producer AND Retailer	1	1%
Total	178	100%

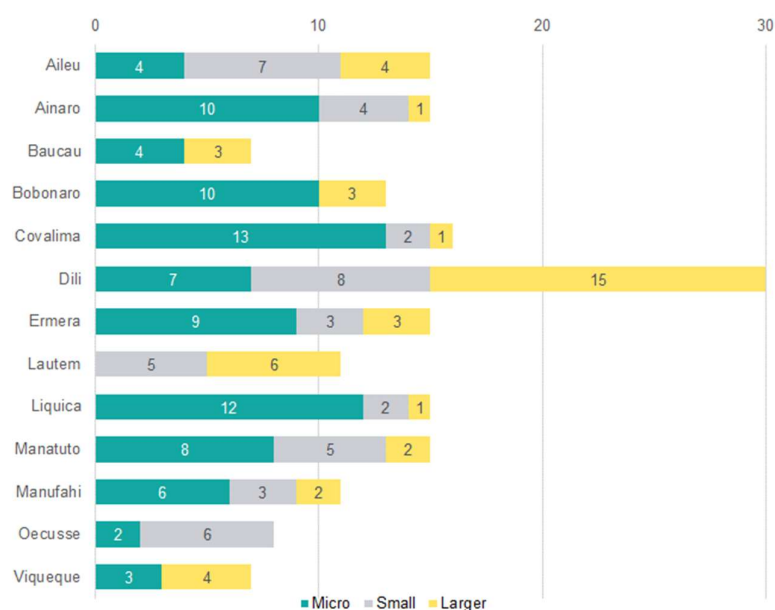


FIGURE 2. BUSINESS SIZE BY MUNICIPALITY (R1)

In line with the number of combined businesses, many types of products were widely stocked among the sample. Oils and fats were the most commonly stocked items, with eggs and ‘essential non-food items’ (defined as soap, cleaning products, sanitary products, etc.) also found in over 80% of businesses. Grains were sold by 75% of businesses and over half (52%) sold meat. Only 10% of businesses sold legumes and nuts. Table 5 outlines the types of products sold by respondent’s businesses.

In Round 2, the ‘grains’ response option was split into ‘rice’ and ‘other grains’ to provide greater specificity. It is clear that for questions throughout the survey, references to grains in Round 1 were mostly interpreted as asking about rice. In Round 2, respondents were also asked about the provenance of the rice they sold. Among the 131 (86%) of respondents who sold rice in their businesses, 98% (129) sold ‘only’ or ‘mostly’ imported rice.

TABLE 5. TYPES OF PRODUCTS STOCKED (R1)

Product	#	%
Oils and fats	152	85%
Eggs	150	84%
Essential non-food health items (soap, cleaning products, sanitary products, etc.)	142	80%
Herb, condiments and spices	139	78%
Grains (rice, corn, flour, etc.)	133	75%
Meat and fish	93	52%
Fruits and vegetables	40	22%
Agricultural products (vegetable or other seed, animal feed and fertilizer)	28	16%
Roots and tubers (cassava, sweet potatoes, potatoes, etc.)	20	11%
Legumes, nuts (any beans, cashews, etc.)	18	10%

Impact of COVID-19 and/or Recent Agricultural Shocks

This section outlines the impacts of the COVID-19 restrictions on businesses, what impacts they anticipated in the coming months, and the impacts of agricultural stressors.

In Round 1, many businesses reported that COVID-19 restrictions had impacted them in some way with 53% open and operating as normal, 44% open at reduced hours or capacity, and 3% of businesses were closed and not operational. Six weeks later, 95% of businesses were open and operating at normal hours.



FIGURE 3. STATUS OF BUSINESS OPERATIONS (R1 & R2)

TABLE 6. STATUS OF BUSINESS OPERATIONS (R1 & R2)

Operational status	Round 1		Round 2	
	#	%	#	%
We're not open / not operating	5	3%	1	1%
larger	1	1%	-	-
small	3	2%	-	-
micro	1	1%	1	1%
We're working at reduced hours or capacity	78	44%	7	5%
larger	20	11%	3	2%
small	25	14%	1	1%
micro	33	19%	3	2%
We're open / operating as per normal	95	53%	144	95%
larger	24	13%	33	22%
small	17	10%	33	22%
micro	54	30%	78	51%
Total	178	100%	152	100%

In Round 1, the financial impact of COVID-19 was high, with 94% of businesses reporting an impact in at least one area of their finances (Table 7). Profits had decreased for 81% of businesses, and 77% reported decreasing revenue/takings. Costs had increased for 20% of businesses, 24% faced challenges accessing credit, and 22% had a decreased ability to deposit takings. There was little difference among

businesses of different sizes for financial impacts. It is notable that 24% of businesses felt that 'ability to deposit takings' did not apply to them, as it indicated that these business owners may not use or have access to financial services. Businesses selling only basic hygiene and cleaning outputs were most likely to report this, with half (50%) of those businesses giving a 'not applicable' response.

By the time of Round 2, the situation seems to have improved for some businesses. Reports of decreased profits dropped from 81% to 68%, and decreased revenue/takings from 77% to 56%. Similar percentages of businesses reported that the ability to access credit or ability to deposit takings did not apply to their business.

TABLE 7. FINANCIAL IMPACT OF RECENT SHOCKS AND STRESSORS ON BUSINESSES (R1 / R2)

	Profit	Revenue/ takings	Costs	Ability to access credit	Ability to deposit takings
Has decreased	81% / 68%	77% / 56%	47% / 22%	24% / 34%	22% / 23%
Has not changed	10% / 22%	10% / 33%	34% / 55%	11% / 20%	11% / 22%
Has increased	3% / 8%	3% / 7%	19% / 21%	5% / 4%	8% / 14%
Don't know	3% / 2%	3% / 4%	2% / 2%	39% / 43%	35% / 41%
n/a	4% / -	6% / -	1% / -	21% / -	24% / -

The impacts on businesses were also found to be affecting workers, though to a reduced level in Round 2. **In Round 1, 57% of respondents reported that they or their staff members were working reduced hours. In Round 2, 23% reported staff working less hours in the preceding 6 weeks.** Larger and small sized businesses were more likely to be working reduced hours than micro ones, though this was less of an effect in Round 2. The amount of hours staff members were working was approximately equal between male and female staff members for both rounds.

TABLE 8. IMPACT OF SHOCKS AND STRESSORS ON STAFF HOURS WORKED (R1 & R2)

Work level	Round 1		Round 2	
	#	%	#	%
We're working less hours	101	57%	35	23%
larger	33	19%	11	7%
small	29	16%	8	5%
micro	39	22%	16	11%
We're working similar hours	72	40%	108	71%
larger	11	6%	24	16%
small	16	9%	22	14%
micro	45	25%	62	41%
We're working more hours	3	2%	9	6%
larger	1	1%	1	1%
small	-	-	4	3%
micro	2	1%	4	3%
Total	178	100%	152	100%

In Round 1, staff incomes had reduced due to the COVID-19 restrictions and recent stressors for 28% of all businesses, but by Round 2 this had dropped to 6%. Among those who reported an impact on staff hours (R1 100 / R2 42), the proportion of those businesses reporting reduced staff income dropped from 50% to 21%. There was no clear trend for the effect of business size on staff income level.

TABLE 9. EFFECT OF RECENT SHOCKS AND STRESSORS ON STAFF INCOMES, AMONG THOSE REPORTING IMPACT (R1 100 / R2 42)

Income	Round 1		Round 2	
	#	%	#	%
Less income	50	50%	9	21%
The same / no change	34	34%	27	64%
More income	5	5%	2	5%
Would rather not say	11	11%	4	10%
Total	100	100%	42	100%

In Round 1, a total of 72% of businesses reported that they did not plan to suspend or terminate staff in the next two months and only 2% of businesses were recruiting or had plans to recruit new staff. Six weeks later, 80% of businesses had no plans to reduce staffing levels, and only 2% intended to reduce them.

TABLE 10. PLANS TO SUSPEND OR TERMINATE STAFF IN THE NEXT TWO MONTHS (R1 & R2)

Staff level plans	Round 1		Round 2	
	#	%	#	%
We plan to suspend or terminate some staff	15	8%	3	2%
larger	9	5%	-	-
small	3	2%	1	1%
micro	3	2%	2	1%
We have no plan to suspend or terminate staff	128	72%	121	80%
larger	33	19%	34	22%
small	39	22%	28	18%
micro	56	31%	59	39%
Don't know	31	17%	28	18%
larger	3	2%	2	1%
small	3	2%	5	3%
micro	25	14%	21	14%
n/a	4	2%	-	-
Total	178	100%	152	100%

In Round 1, agricultural and environmental shocks had some effect on businesses, but less so than the COVID-19 restrictions. Table 11 shows how respondents felt recent agricultural and environmental shocks had affected their businesses in each of the two rounds. **Micro businesses were the most affected by all agricultural and environmental shocks.** For example, micro businesses made up four times as many responses in the worst category of crop pest impact, and 77% of the responses in the worst category of

unseasonal/erratic rain impact. Most shocks were spread approximately equally across the municipalities, but responses indicating 'a lot' of impact for livestock diseases were most common in Covalima, and very bad harvest in Liquiça.

At the time of Round 2, there was an increase of respondents reporting both 'a lot' of impact and 'no' impact from all agricultural shocks and stressors. This may indicate that, of respondents reporting 'a little' in the first round, some had recovered while others' situation had worsened in the 6 weeks between the data collection rounds. It should be noted that the increase is partly due to this question being made required in Round 2. In Round 1, there were 53 non-responses to this question.

TABLE 11. IMPACT OF AGRICULTURAL/ENVIRONMENTAL SHOCKS (R1 / R2)

	Unseasonal / erratic rains	Too little rain / drought	Livestock diseases	Crop pests (inc. FAW)	Very bad harvest	Excessive/ very strong winds
A lot of impact	15% / 27%	10% / 31%	30% / 52%	16% / 31%	11% / 27%	6% / 20%
A little impact	25% / 16%	20% / 14%	13% / 11%	19% / 18%	17% / 17%	18% / 19%
It has not had an impact on us	15% / 36%	18% / 34%	12% / 16%	13% / 20%	14% / 23%	17% / 30%
Don't know / Not relevant	46% / 20%	52% / 22%	44% / 21%	53% / 31%	57% / 33%	60% / 32%

Three additional questions were added to this survey section in Round 2. The first asked whether the impact of agricultural/environmental shocks affected them directly (in their own households), indirectly (because their customers were affected) or both. Respondents were then asked how agricultural/environmental shocks experienced by their customers affected their businesses, and finally how their household's food security situation had impacted their business activities. Table 12 shows that only 35% of respondents indicated that their customers, but not their own households had been affected by recent shocks. The main effects of these shocks on businesses (Table 13) were that 'customers are buying less food' and there were 'less customers'. While 32% of respondents said that their household food security situation did not affect their business activities (Table 14), 36% said that the situation had made them focus more on their businesses.

TABLE 12. HOW BUSINESSES WERE IMPACTED BY AG. / ENVIRONMENTAL SHOCKS (R2)

Impact	#	%
Both my household and my customers were affected	29	22%
larger	7	5%
small	4	3%
micro	18	14%
My customers were affected	46	35%
larger	20	15%
small	4	3%
micro	22	17%
My household was affected	56	43%
larger	4	3%
small	19	15%
micro	33	25%
n/a	21	14%
Total	152	100%

TABLE 13. EFFECT OF CUSTOMERS' SHOCKS/STRESSORS ON BUSINESSES (R2 ONLY)

Effect of customer's stressors on businesses	#	%
Customers are buying less food	81	53%
Less customers come to my business	40	26%
Customers are buying more food	31	20%
Customers are buying less non-food products	21	14%
Customers are buying more non-food products	12	8%
More customers come to my business	11	7%
Other	5	3%

TABLE 14. EFFECT OF HOUSEHOLD FOOD SECURITY ON BUSINESS ACTIVITIES (R2)

Effect of food security on business activities	#	%
I am focusing more on my business	54	36%
My household's food security has not affected my business	48	32%
I am working more hours	29	19%
I am unable to focus on my business	28	18%
I am working less hours	22	14%
I am buying more stock for my business to sell	17	11%
I am investing more in my business	13	9%
I am buying less stock for my business to sell	11	7%
I am delaying investing in my business	3	2%

Table 15 shows the crop most affected by agricultural shocks, with **maize being the most affected crop in both rounds of data collection (R1 44% / R2 53%)**. This is in accordance with the recent 2020 Rapid Food Security Assessment, where 64% of respondents from that household survey reported poor maize harvests this year. The 2020 maize harvest was completed in March - May in most areas of Timor-Leste. The percentage of respondents reporting that rice was affected increased between the two data collection rounds. Rice harvest was in the early stages in many areas of the country at the time of Round 1 data collection, and would likely have been completed by Round 2 in many areas. The increase in reports of affected rice suggests a poor or reduced harvest for some locations. Few larger businesses were affected in this category, with micro businesses most likely to be affected for most crops.

TABLE 15. CROP MOST AFFECTED BY AGRICULTURAL SHOCKS (R1 & R2)

	Maize	Veg.	Tubers	Fruit	Rice	Other	Don't know	Not relevant
Most affected R1	44%	36%	25%	22%	18%	2%	8%	19%
Most affected R2	53%	30%	25%	25%	29%	1%	13%	20%

Changes / Impacts on Supply

Many businesses reported supply-side impacts on their operations. Table 16 shows where surveyed businesses report sourcing their goods. Dili is the most common source for all business sizes. The largest reduction in source of goods between the two rounds was 'from a neighboring suco' and the largest increase was 'from Dili.'

TABLE 16. SOURCE OF GOODS (R1 & R2)

Location	Round 1	Round 2
	%	%
From Dili	63%	70%
From a larger posto admin. or municipal town (not a municipal capital)	23%	20%
From Indonesia	22%	24%
From this suco	15%	10%
From a municipal capital	12%	11%
From a neighbouring suco	11%	5%
Other	4%	7%
From another country (other than Indonesia)	3%	1%

Respondents were asked about their ability to purchase goods for their businesses and

Table 17 outlines this data. **While many businesses expressed difficulties in this area in Round 1, the number of reports of 'very difficult' dropped from 43% to 22% between the rounds, and the number of those reporting 'easier' increased from 7% to 13%.** It should be noted that Round 2 asked for responses based on the previous 6 weeks.

TABLE 17. CHANGES TO ABILITY TO PURCHASE GOODS (R1 & R2)

Ability to purchase	Round 1		Round 2	
	#	%	#	%
Very difficult	76	43%	33	22%
larger	12	7%	8	5%
small	19	11%	5	3%
micro	45	25%	20	13%
A little bit difficult	57	32%	50	33%
larger	14	8%	12	8%
small	14	8%	9	6%
micro	29	16%	29	19%
Has not changed	30	17%	47	31%
larger	13	7%	13	9%
small	9	5%	10	7%
micro	8	4%	24	16%

Ability to purchase	Round 1		Round 2	
	#	%	#	%
Easier	12	7%	20	13%
larger	5	3%	2	1%
small	3	2%	9	6%
micro	4	2%	9	6%
Don't know	3	2%	2	1%
Total	178	100%	152	100%

In Round 1, regional or global border closures were reported to have a high impact on all three business sizes, with 41% of all respondents indicating that these closures had ‘a lot’ of impact. By Round 2 this had reduced to 33% (based on the previous 6 weeks), and the number of respondents reporting ‘no impact’ increased from 12% to 27%. Round 1 responses seemed to indicate that even micro level business are aware of the larger-scale effects on their supply chains, so for businesses that indicated that they were affected in Round 2 (86), a question was added to inquire why border closures affected respondents’ businesses. Table 19 outlines responses to this question. For all business sizes, the most common responses were that they or their suppliers could not import goods.

TABLE 18. IMPACT OF REGIONAL OR GLOBAL BORDER CLOSURES (R1 & R2)

Impact	Round 1		Round 2	
	#	%	#	%
A lot	73	41%	50	33%
larger	16	9%	8	5%
small	19	11%	9	6%
micro	38	21%	33	22%
A little	51	29%	36	24%
larger	12	7%	15	10%
small	14	8%	8	5%
micro	25	14%	13	9%
No impact	22	12%	41	27%
larger	11	6%	8	5%
small	2	1%	11	7%
micro	9	5%	22	14%
Don't know	32	18%	25	16%
larger	6	3%	5	3%
small	10	6%	6	4%
micro	16	9%	14	9%
Total	178	100%	152	100%

TABLE 19. REASON GLOBAL BORDER CLOSURES AFFECT BUSINESSES (#=86) (R2 ONLY)

	My supplier cannot import goods	I cannot import goods	Trucks are not bringing goods from Indonesia	International transport issues have affected my supply chain
larger	19%	17%	6%	7%
small	12%	6%	3%	1%
micro	30%	23%	10%	7%
Total	60%	47%	20%	15%

Respondents were asked about whether they were still able to import goods, whether they have experienced difficulties with customs and quarantine, and whether goods that they had ordered have been able to cross the Indonesian border. There was a high percentage of 'not relevant' responses to these questions in Round 1 however, which is likely due to the low representation of importers in the sample. Among the few respondents who did offer a response in Round 1, an approximately equal number were still receiving goods from Indonesia as those who could not. For Round 2, this question was asked only of those respondents who reported sourcing their goods from abroad (36). Among those sourcing goods from overseas in Round 2, 28% could import all stock, 64% could import some stock, and 8% could not import stock from abroad at present.

Only 8% of respondents reported not being able to transport any stock from Dili to their locations in Round 1, and 5% in Round 2. The number of respondents who could transport all stock increased from 13% to 24%. Transport issues were also common among respondents in the 2020 Food Security Assessment

where lack of transport was found to be the highest challenge to market access, with 82% of respondents from that survey reporting a lack of transport and 47% of those respondents noting 'regulations prohibiting movement'.

TABLE 20. ABILITY TO TRANSPORT STOCK FROM DILI TO MUNICIPAL LOCATIONS (R1 & R2)

Transport ability	Round 1		Round 2	
	#	%	#	%
Able to transport all stock	23	13%	36	24%
larger	11	6%	8	5%
small	4	2%	15	10%
micro	8	4%	13	9%
Able to transport only some stock	75	42%	59	39%
larger	16	9%	13	9%
small	24	13%	12	8%
micro	35	20%	34	23%
Cannot transport any stock	14	8%	8	5%
larger	4	2%	1	1%
small	1	1%	2	1%
micro	9	5%	5	3%
Don't know	20	11%	8	5%
Not relevant / n/a	45	26%	41	27%
Total	178	100%	152	100%

The majority of respondents reported that they have not changed the source/stockist where they source their goods, and this was consistent in both Round 1 and Round 2 (61% and 64% respectively). Note that Round 2 asked for responses based on the previous 6 weeks.

TABLE 21. CHANGES IN WHERE OR HOW GOODS ARE SOURCED IN THE LAST 2 MONTHS (R1 & R2)

Source	Round 1		Round 2	
	#	%	#	%
Changed source/stockist for most supplies	11	6%	17	11%
larger	4	2%	1	1%
small	4	2%	5	3%
micro	3	2%	11	7%
Changed source/stockist for some supplies	51	29%	33	22%
larger	9	5%	7	5%
small	13	7%	6	4%
micro	29	16%	20	13%
Have not changed source/stockist	109	61%	98	64%
larger	29	16%	27	18%
small	28	16%	23	15%
micro	52	29%	48	32%
Don't know	7	4%	4	3%
Total	178	100%	152	100%

In Round 1, a total of 58% of respondents reported that COVID-19 restrictions or recent agricultural shocks did or sometimes did have an effect on the availability/volume of goods available from vendors. This decreased slightly to 54% in Round 2.

TABLE 22. EFFECT ON AVAILABILITY/VOLUME OF GOODS FROM VENDORS (R1 & R2)

Effect on availability of goods	Round 1		Round 2	
	#	%	#	%
Yes	76	43%	56	37%
larger	16	9%	18	12%
small	24	13%	9	6%
micro	36	20%	29	19%
Sometimes / it varies	26	15%	26	17%
larger	9	5%	5	3%
small	7	4%	6	4%
micro	10	6%	15	10%
No	68	38%	70	46%
larger	18	10%	13	9%
small	13	7%	19	13%
micro	37	21%	38	25%
Total	178	100%	152	100%

The number of businesses reporting that they could access goods in the quantities they needed jumped considerably from 51% in Round 1 to 75% in Round 2. In the second round, only 11% of businesses were unable to access goods in the quantities needed.

TABLE 23. ABILITY TO ACCESS GOODS AT THE QUANTITY NEEDED (R1 & R2)

Access to goods	Round 1		Round 2	
	#	%	#	%
Yes	90	51%	114	75%
larger	23	13%	32	21%
small	24	13%	25	16%
micro	43	24%	57	38%
Sometimes / it varies	29	16%	21	14%
larger	5	3%	2	1%
small	10	6%	6	4%
micro	14	8%	13	9%
No	57	32%	17	11%
larger	16	9%	2	1%
small	11	6%	3	2%
micro	30	17%	12	8%
n/a	2	1%	-	-
Total	178	100%	152	100%

The availability of specific goods, across all surveyed businesses, is outlined in Table 24. Herbs, condiments and spices (traded by 78% of businesses) were the most available goods, and **grains (traded by 75% of businesses) were the least available**. In Round 2, an option was added to differentiate between 'unable to get at all' and 'unable to get at the volume/quantity needed'. Though the percentages of unavailable items appear to reduce for Round 2, the additional option accounts for this and there was an increase or only a small reduction in unavailability for all products. The 'grains' category from Round 1 was split into 'rice' and 'other grains' for Round 2. For rice, **24% of Round 2 respondents reported that they were unable to source any rice to sell**.

TABLE 24. ABILITY TO SOURCE GOODS (R1 / R2)

	Unable to get at all (R2 only)	Unable to get at the volume / quantity needed	Able to get, as per normal or at the volume / quantity needed	n/a (R1 only)
Grains (R1 only)	-	39%	50%	11%
Rice (R2 only)	24%	12%	64%	-
Other Grains (R2 only)	14%	14%	73%	-
Oils and fats	7%	27% / 15%	58% / 78%	15%
Eggs	10%	26% / 9%	60% / 81%	14%
Meat and fish	15%	24% / 14%	46% / 71%	30%
Essential non-food / health items	14%	21% / 15%	56% / 72%	22%
Herb, condiments and spices	10%	19% / 8%	61% / 83%	20%

	Unable to get at all (R2 only)	Unable to get at the volume / quantity needed	Able to get, as per normal or at the volume / quantity needed	n/a (R1 only)
Fruits and vegetables	17%	19% / 13%	40% / 71%	40%
Roots and tubers	20%	17% / 17%	39% / 62%	44%
Legumes and nuts	25%	17% / 17%	34% / 58%	49%
Agricultural products	34%	15% / 20%	39% / 46%	46%

Price uncertainty was low across both rounds, but uncertainty increased slightly from 19% in Round 1 to 24% in Round 2. Note that Round 2 asked for responses based on the previous 6 weeks.

TABLE 25. PRICE UNCERTAINTY (R1 & R2)

Price Uncertainty	Round 1		Round 2	
	#	%	#	%
More uncertain	34	19%	36	24%
larger	5	3%	8	5%
small	5	3%	10	7%
micro	24	13%	18	12%
Same as usual	135	76%	112	74%
larger	39	22%	28	18%
small	37	21%	23	15%
micro	59	33%	61	40%
Don't know	9	5%	4	3%
Total	178	100%	152	100%

Grains had the highest reported price increases from the list of products in Table 26. After splitting this category for Round 2, it is clear that rice is the item where this effect is greatest, as **67% of respondents reported a price increase specifically for rice**. Manufactured goods such as essential non-food health items, and herbs/condiments/spices were the most likely products to be selected as selling for the same price.

TABLE 26. PRICE CHANGES FOR BUSINESS GOODS (R1 / R2)

	Increased	Stayed the same	Decreased	Don't know	n/a
Grains (R1 only)	46% / -	33% / -	6% / -	2% / -	13% / -
Rice (R2 only)	- / 67%	- / 29%	- / 1%	- / 3%	- / -
Other Grains (R2 only)	- / 5%	- / 76%	- / 5%	- / 14%	- / -
Oils and fats	14% / 18%	60% / 76%	6% / 3%	1% / 3%	19% / -
Essential non-food / health items	12% / 13%	57% / 78%	3% / -	2% / 9%	25% / -
Meat and fish	10% / 13%	46% / 77%	7% / 3%	3% / 8%	34% / -
Eggs	10% / 16%	61% / 77%	10% / 3%	0% / 4%	20% / -
Agricultural products	4% / 12%	19% / 51%	3% / -	26% / 37%	48% / -
Fruits and vegetables	2% / 6%	36% / 72%	8% / 6%	8% / 17%	46% / -
Herb, condiments and spices	2% / 8%	68% / 84%	4% / 2%	1% / 6%	25% / -
Roots and tubers	1% / 3%	33% / 66%	6% / 6%	13% / 25%	48% / -
Legumes and nuts	1% / 1%	29% / 68%	5% / 6%	14% / 25%	51% / -

In Round 1, over half of the respondents reported delays in the delivery time for goods, with 20% of respondents reporting that delivery times were taking 'much longer' than usual and a further 38% reporting goods taking 'a little bit' longer. In Round 2, respondents were asked to base their answers on the last six weeks. Just over half (51%) indicated that there had been no change, but 45% said that goods took 'much longer' or 'a little bit longer' to arrive.

TABLE 27. CHANGES IN DELIVERY TIMES FOR GOODS (R1 & R2)

Time	Round 1		Round 2	
	#	%	#	%
Much longer	36	20%	10	7%
larger	7	4%	3	2%
small	11	6%	1	1%
micro	18	10%	6	4%
A little bit longer	67	38%	58	38%
larger	16	9%	14	9%
small	15	8%	13	9%
micro	36	20%	31	20%
Faster	6	3%	6	4%
larger	3	2%	1	1%
small	2	1%	2	1%
micro	1	1%	3	2%
The same (no change)	69	39%	78	51%
larger	19	11%	18	12%
small	17	10%	18	12%
micro	33	19%	42	28%
Total	178	100%	152	100%

Changes / Impacts on Demand and Trade Dynamics

In Round 1, 63% of respondents felt that there were products that they normally sold that were scarce now but this had reduced to 37% in Round 2. In Round 1, this was highest (21% of all respondents) among businesses specializing in agricultural outputs/food.

TABLE 28. SCARCITY OF NORMALLY STOCKED PRODUCTS (R1 & R2)

Scarcity	Round 1		Round 2	
	#	%	#	%
Yes	112	63%	56	37%
larger	29	16%	13	9%
small	31	17%	11	7%
micro	52	29%	32	21%
No	66	37%	96	63%
larger	16	9%	23	15%
small	14	8%	23	15%
micro	36	20%	50	33%
Total	178	100%	152	100%

In line with the overall reduction in scarcity shown above, there were reductions in the scarcity of all specific products except for legumes/nuts and roots/tubers (Table 29).

TABLE 29. SCARCITY OF SPECIFIC PRODUCTS (R1 & R2)

	Grains	Essential non food / health items	Eggs	Oils and fats	Meat and fish	Fruits and vegetables	Agricultural products	Herb, condiments and spices	Legumes and nuts	Roots and tubers
Currently scarce R1	31%	22%	19%	18%	17%	15%	14%	13%	8%	6%
Currently scarce R2	9% (rice)	8%	7%	5%	12%	12%	11%	5%	9%	11%

In Round 1, most (72%) businesses reported that they would not run out of any product in the next 7 days, but 32% of micro businesses (16% of the total sample) thought that they would. By Round 2, 80% of businesses said that they would not run out of products in the next week.

TABLE 30. BUSINESSES ANTICIPATING RUNNING OUT OF ANY PRODUCT IN THE NEXT 7 DAYS (R1 & R2)

Supply challenges anticipated	Round 1		Round 2	
	#	%	#	%
No	128	72%	121	80%
larger	34	19%	27	18%
small	35	20%	25	16%
micro	59	33%	69	45%
Yes	50	28%	31	20%
larger	11	6%	9	6%
small	10	6%	9	6%
micro	29	16%	13	9%
Total	178	100%	152	100%

Among respondents (R1 50 / R2 31) who reported that they will run out of any product in the next 7 days, Table 31 outlines the most common products and the size of the businesses affected. **Of these respondents, half or more thought they would run out of oils and fats and grains in the next week in Round 1, but this dropped to 29% for oils and fats in Round 2. Grains/Rice however, stayed at 50% through both rounds.** Other than an increase in respondents reporting 'meat and fish', most other products were comparable between the rounds.

TABLE 31. RESPONDENTS REPORTING THAT THEY WILL RUN OUT OF GOODS, AMONG THOSE REPORTING SHORTAGES (N=50 / N=31) (R1 / R2)

	Oils and fats	Grains (R1)	Rice (R2)	Other grains (R2)	Eggs	Essential non-food health items	Herb, condiments and spices	Meat and fish
Yes	54% / 29%	50%	50%	29%	48% / 45%	36% / 23%	32% / 32%	26% / 35%
larger	8% / 3%	12%	19%	3%	6% / 3%	4% / 3%	6% / 3%	4% / 3%
small	10% / 14%	6%	6%	10%	14% / 16%	6% / 10%	8% / 13%	10% / 13%
micro	36% / 28%	32%	23%	13%	28% / 23%	26% / 10%	18% / 13%	12% / 19%

In Round 1, nearly half (47%) of respondents reported that there have been significant price increases in the last two months. In Round 2, the question asked about the previous 6 weeks, and 57% of respondents reported increases in this time period. Table 32 shows the distribution of those reporting price increases among the three sizes of businesses and Table 33 shows the four products most reported to have had price increases from Round 1. The top four products were the same in Round 2, except that 'Meat and fish' replaced 'Essential non-food items'. **'Grains' or 'Rice' was the top product from each round, with most (R1 87% / R2 92%) respondents reporting a price increase.**

In Round 2, respondents were asked if there were any products that customers asked for that they could not supply. The top two responses were 'agricultural goods' (25%) and rice (19%).

TABLE 32. SIGNIFICANT PRICE INCREASES FOR GOODS (R1 & R2)

	Round 1		Round 2	
Price increase	#	%	#	%
Yes	83	47%	86	57%
larger	18	10%	21	14%
small	18	10%	19	13%
micro	47	26%	46	30%

TABLE 33. GOODS WITH RETAIL PRICE INCREASE, AMONG THOSE REPORTING INCREASES (R1 83 / R2 86)

Price increase	Grains (R1)	Rice (R2)	Oils and fats	Essential non-food / health items	Eggs
Yes	87%	92%	33% / 21%	19% / 9%	18% / 13%
larger	18%	20%	5% / 3%	11% / 3%	4% / 3%
small	18%	20%	4% / 3%	1% / 0%	2% / 2%
micro	51%	52%	24% / 14%	7% / 6%	12% / 7%

Changes in demand for products/services were found to be high in Round 1, with 46% reporting a decrease, and 13% reporting an increase. This trend was reversed in Round 2, with 15% reporting a decrease, and 41% reporting an increase.

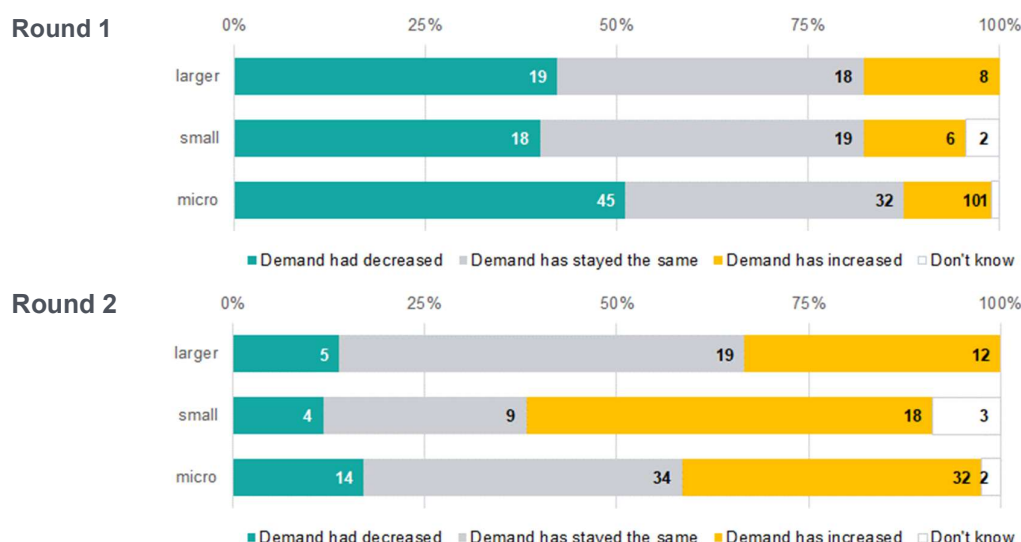


FIGURE 4. CHANGES IN DEMAND FOR PRODUCTS AND SERVICES (R1 & R2)

There were no clear trends for demand among business types, sizes, or products stocked, but Table 35 shows which products showed the most changes in demand levels. **Grains had the highest levels of both increased and decreased demand in Round 1, and the largest levels of increase in Round 2.** Responses of increase for demand for all other products doubled or more for all other products. The decrease for grains in Round 1 was most often reported in Aileu, which is logical since, at time of survey, the first rice harvest has just taken place there. The highest demand increase for grains was found in Liquiça, where rice harvest had not taken place at the time of the survey. The Rapid Food Security Assessment 2020, which was completed approximately 2 weeks before the Round 1 Rapid Market Resilience Assessment report, found: “A late rice harvest is in progress for many locations, but reports from the western municipalities indicate an extremely poor harvest with reductions in the area of rice planted and widespread crop failures. Ministry of Agriculture and Fisheries’ projections estimate that only 30% - 70% of the normal rice paddy area has been planted this year, that the failure rate is high due to lack of rain, and that harvest has been delayed due to late planting.” Timor-Leste depends heavily on rice imports for much of its domestic consumption, with rice imports worth over USD 27 million in 2017 and USD 35 million in 2018.⁸

The World Food Programme’s bi-weekly market price monitoring data shows minor increases in imported rice prices, but that the rate remained stable at approximately USD \$0.50 - \$0.55 per kilogram between March to July.⁹ Consumer Price Index time series data prepared by the Statistics Office reported a minor inflation 1.7%, below government policy between 4% and 7% every year.¹⁰ Private-sector import figures

⁸ World Bank Group (2020). World Integrated Trade Solution: East Timor trade summary 2017. Retrieved from: <https://wits.worldbank.org/CountryProfile/en/Country/TMP/Year/LTST/Summarytext>

OEC (2020). Rice in Timor-Leste. Retrieved from: <https://oec.world/en/profile/bilateral-product/21006/reporter/tls>

⁹ WFP (2020). Market monitor report: Food security analysis Timor-Leste. Accessed online: <https://www.wfp.org/publications/market-monitor-report-timor-leste-wk-26-27-2020>

¹⁰ General Directorate of Statistics (GDS) (2020). Consumer Price Index: Time series data. Retrieved from: <https://www.statistics.gov.tl/category/survey-indicators/consumer-price-index/?lang=en>

indicate that a sufficient volume of sufficient rice is available, with 79,926.98 MT imported during the first two quarters of 2020.¹¹ During the State of Emergency, movement restrictions, reduced consumer numbers, and various agriculture stressors affected market functionality. It is important to note that the Rapid Market Resilience Assessment data reflects the perspective of the market actors on price and product variance, but does not capture the extent to which prices increased.

TABLE 34. CHANGES IN DEMAND FOR PRODUCTS/SERVICES (R1 & R2)

Demand level	Round 1		Round 2	
	#	%	#	%
Demand had decreased	82	46%	23	15%
larger	19	11%	5	3%
small	18	10%	4	3%
micro	45	25%	14	9%
Demand has stayed the same	69	39%	62	41%
larger	18	10%	19	13%
small	19	11%	9	6%
micro	32	18%	34	22%
Demand has increased	24	13%	62	41%
larger	8	4%	12	8%
small	6	3%	18	12%
micro	10	6%	32	21%
Don't know	3	2%	5	3%
Total	178	100%	152	100%

TABLE 35. DEMAND LEVEL FOR SPECIFIC PRODUCTS (R1 / R2)

	Grains (R1)	Rice (R2)	Oils and fats	Essential non-food / health items	Eggs	Meat and fish
Demand increased	38%	68%	19% / 38%	16% / 32%	13% / 32%	10% / 26%
Demand decreased	22%	6%	14% / 5%	13% / 7%	17% / 6%	15% / 6%
No change	26%	23%	48% / 51%	44% / 50%	50% / 56%	37% / 56%
n/a	10%	4%	15% / -	21% / -	16% / -	30% / -
Not relevant / don't trade in this product	4%	0%	4% / 6%	6% / 11%	3% / 6%	10% / 12%

Table 36 outlines respondents' thoughts on what was influencing the change in demand for their products/services. While the question asked specifically about demand, it is possible that respondents may have not have differentiated between demand (what people want) and purchasing (what people are

¹¹ WFP (2020). Imported rice series data: Jan 2012 - Jan 2020 [Data extract].

actually buying.) For larger businesses, the most common response was ‘limited/no stock available’, while for micro businesses it was ‘reduced spending due to insecure incomes.’

TABLE 36. REASONS FOR CHANGES IN DEMAND FOR PRODUCTS/SERVICES (R1 ONLY)

	Limited / no stock available	Reduced spending due to insecure incomes	Reduced spending due to more limited movement / public health restrictions	Increased spending due to customers preparing for Covid- 19	Decreased demand for our products	Increase in product prices (more expensive than normal)	Increased demand for our products	Decrease in product prices (cheaper than normal)	Don't know
Total	43%	41%	33%	29%	28%	28%	14%	5%	5%
larger	11%	5%	7%	6%	9%	3%	7%	1%	2%
small	12%	11%	10%	10%	8%	8%	3%	2%	2%
micro	20%	25%	15%	13%	11%	17%	4%	2%	2%
#	76	73	58	52	50	50	25	9	9

By the time of the Round 2 data collection, the GoTL’s \$100 COVID-19 household payment had entered its implementation phase. The nationwide payment went out to households across Timor-Leste, with the intention of helping to reduce the shocks associated with the COVID-19 restrictions. Respondents were asked whether this had an effect on demand for their business’ products or services, and 51% said that demand had increased while 43% felt that demand had stayed the same. Among the 78 respondents who felt that demand had increased, 94% said that they were able to meet this increased demand with their existing stock levels. Regarding prices, 82% said that their prices had stayed the same since the introduction of the \$100 household payment.

Customer numbers were widely reported to have dropped in Round 1, with 78% of respondents noting a decrease in the last two months. This had reduced to 20% reporting a decrease in the six weeks preceding Round 2 data collection. The number of respondents reporting an increase in customer levels grew from 9% to 34% over the six-week interval. The decreased in customer numbers was consistent across all sizes of businesses across both rounds.

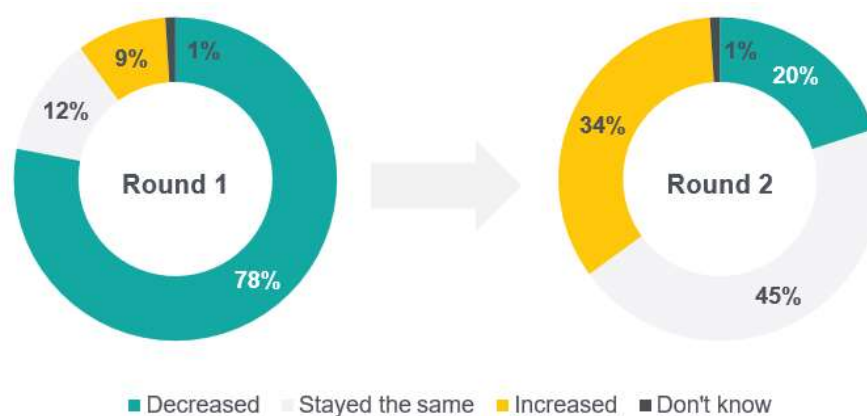


FIGURE 5. CHANGES IN CUSTOMER LEVELS (R1 & R2)

TABLE 37. CHANGES IN CUSTOMERS LEVELS (R1 & R2)

Customer levels	Round 1		Round 2	
	#	%	#	%
Decreased	139	78%	31	20%
Stayed the same	21	12%	68	45%
Increased	16	9%	52	34%
Don't know	2	1%	1	1%
Total	178	100%	152	100%

There was an increase in ‘buying more’ across all demographics between the rounds, and a reduction for people ‘buying less’ for all demographics except ‘people with difficulties’, which stayed approximately the same. There was less than 1% change in responses regarding ‘wealthier community members’ purchasing behavior; but ‘elderly’ customers, the demographic most likely to have bought less in Round 1, jumped from 4% to 30% in the ‘buying more’ category between May and July.

TABLE 38. RESPONDENT OBSERVATIONS ON CUSTOMER DEMOGRAPHICS (R1 / R2)

	Elderly (aged 60 years plus)	Young people	Poorer community members	Women	Men	People with difficulties	Wealthier community members
Buying less	33% / 18%	26% / 8%	24% / 9%	24% / 7%	24% / 8%	16% / 17%	11% / 8%
Buying more	4% / 30%	19% / 29%	3% / 19%	24% / 45%	16% / 47%	1% / 13%	19% / 20%
Not observed	33% / 35%	30% / 35%	42% / 64%	28% / 26%	29% / 26%	50% / 64%	46% / 62%
No change	11% / 17%	15% / 29%	11% / 9%	17% / 22%	24% / 18%	6% / 6%	9% / 10%
n/a	18% / -	10% / -	20% / -	6% / -	7% / -	28% / -	15% / -

There was little change in how customers are paying for items, with 79% of Round 1 respondents and 74% of Round 2 respondents reporting no change in this area. Security and theft concerns were not prevalent among businesses, with over half (57%) reporting no changes in this area at the time of Round 1 surveys. By Round 2, 63% of businesses said that they were less concerned than six weeks ago, and 33% said that their level of concern had not changed in that time.

TABLE 39. CONCERNS ABOUT SECURITY AND THEFT, COMPARED TO 2 MONTHS AGO (R1 & R2)

Security/theft concerns	Round 1		Round 2	
	#	%	#	%
We're more concerned about theft / security now	16	9%	7	5%
larger	8	4%	2	1%
small	2	1%	-	-
micro	6	3%	5	3%

Security/theft concerns	Round 1		Round 2	
	#	%	#	%
Concern has stayed the same	102	57%	50	33%
larger	21	12%	12	8%
small	27	15%	12	8%
micro	54	30%	26	17%
We're less concerned about theft / security now	60	34%	95	63%
larger	16	9%	22	14%
small	16	9%	22	14%
micro	28	16%	51	34%
Total	178	100%	152	100%

Access to COVID-19 Information

Table 40 outlines the top ten sources of information on COVID-19. **All (100%) respondents reported having received information on COVID-19. Furthermore, 98% of Round 1 and 100% of Round 2 respondents said that this information had helped them to understand and prepare for COVID-19.** Respondents received information via:

- Television (R1 96% / R2 91%),
- Facebook (R1 53% / R2 64%)
- Community leaders (R1 46% / R2 43%), and
- Radio (R1 43% / R2 55%).

Less than 4% of respondents in either round reported receiving information from any: business/trade associations, formal community groups, village savings and lending groups, or other sources.

When asked about their level of trust in the information they received, most respondents said they 'always or mostly' believed the messages they received (R1 94% of respondents and R2 99% of respondents).

TABLE 40. SOURCES OF INFORMATION ON COVID-19

Information source	Round 1	Round 2
Television	96%	91%
Facebook	53%	64%
Community leader - Xefe Suco or Xefe Aldeia	46%	43%
Radio	43%	55%
NGO / international program staff	41%	50%
WhatsApp	34%	41%
Text message	32%	46%
Loudspeaker / megaphone	32%	39%
Neighbours or friends - Informal	15%	23%
Newspaper	8%	26%

Respondents were asked (unprompted) what they could do to keep their businesses safe from COVID-19. **The highest responses (R1 90% / R2 88%) were ‘wear a mask’, and ‘wash hands regularly’ and/or ‘wash hands regularly with soap’ (R1 98% and R2 100%). In Round 2, there were notable increases in the number of respondents mentioning ‘wash hands regularly’, and ‘clean work surfaces’.** The proportion of respondents responding that they could ‘maintain physical distancing (1m+) / limit the number of customers in the one place at the same time’ was lower in Round 2 (64%) than Round 1 (75%).

TABLE 41. HOW TO KEEP YOUR BUSINESS SAFE FROM COVID-19 (UNPROMPTED) (R1 & R2)

Safety strategy	Round 1		Round 2	
	#	%	#	%
Wear a mask	160	90%	134	88%
Wash hands regularly with soap	155	87%	125	82%
Maintain physical distancing (1m+) / limit the number of customers in the one place at the same time	134	75%	98	64%
Wash hands regularly	104	58%	107	70%
Cough/sneeze into elbow	38	21%	42	28%
Clean work surfaces	30	17%	43	28%
Not form groups	24	13%	23	15%

Business Impacts, Adaptations and Supports

When questioned about the types of impacts of COVID-19 restrictions on their businesses, 39% of respondents reported no impact in Round 1, increasing to 46% in Round 2. There were reductions in the incidences of all specific impacts, except ‘reduced profit,’ which saw a small increase.

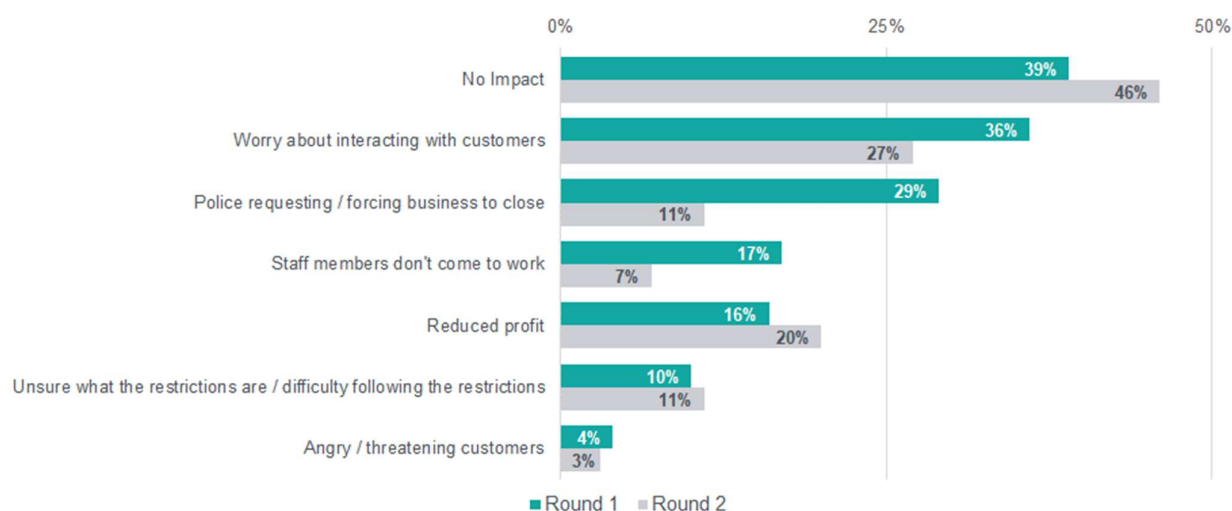


FIGURE 6. IMPACT OF COVID-19 RESTRICTIONS ON BUSINESS (R1 & R2)

TABLE 42. IMPACT OF COVID-19 RESTRICTION ON BUSINESSES

	No Impact	Worry about interacting with customers	Police requesting / forcing business to close	Staff members don't come to work	Reduced profit	Unsure what the restrictions are / difficulty following the restrictions	Angry / threatening customers
Round 1	39%	36%	29%	17%	16%	10%	4%
Round 2	46%	27%	11%	7%	20%	11%	3%

When asked what impacts of policies and restrictions they anticipated in the next two months, the top three responses in Round 1 related to problems with supply and demand. Inability to furnish stock was the highest response (R1 42%), followed by 'reduced spending due to insecure incomes' (R1 41%), and 'decreased demand' (R1 31%). By Round 2, anticipation of most impacts had reduced considerably, but notably 'increased demand for our products' increased in incidence from 16% to 26%. There was also a small increase in 'customers spending due to preparing for COVID-19.'

TABLE 43. ANTICIPATED IMPACTS IN THE NEXT TWO MONTHS

Anticipated impact	Round 1	Round 2
Limited / no stock available	42%	26%
Reduced spending due to insecure incomes	41%	41%
Decreased demand for our products	31%	14%
Reduced spending due to more limited movement / public health restrictions	22%	18%
Increase in product prices (more expensive than normal)	22%	24%
Increased spending due to customers preparing for Covid-19	16%	18%
Increased demand for our products	16%	26%
Decrease in product prices (cheaper than normal)	7%	2%
Don't know	15%	11%

In Round 2, respondents were asked how prepared they were to face these anticipated impacts. **Most businesses (88%) felt 'fully' or 'somewhat' prepared to face these shocks.**

TABLE 44. LEVEL OF PERCEIVED PREPARATION FOR ANTICIPATED SHOCKS (R2)

Level of preparation	#	%
I am fully prepared to respond	120	79%
large	28	18%
medium	31	20%
small	61	40%

Level of preparation	#	%
I am somewhat prepared to respond	14	9%
large	4	3%
medium	2	1%
small	8	5%
I am not prepared to respond	5	3%
large	1	1%
medium	1	1%
small	3	2%
I don't know if I am prepared to respond	13	9%
large	3	2%
medium	-	-
small	10	7%
Total	152	100%

In Round 1, 71% of businesses reported having made changes to adapt to COVID-19 restrictions associated with the State of Emergency. By Round 2, this had increased to 84%.

TABLE 45. CHANGES TO ADAPT TO THE RESTRICTIONS/STATE OF EMERGENCY (R1 & R2)

Adapted	Round 1		Round 2	
	#	%	#	%
Yes	126	71%	127	84%
larger	28	16%	29	19%
small	31	17%	33	22%
micro	67	38%	65	43%
No	52	29%	25	16%
larger	17	10%	7	5%
small	14	8%	1	1%
micro	21	12%	17	11%
Total	178	100%	152	100%

There were reductions in the incidence of respondents making all specific adaptations in their businesses between May and July. This may indicate a return to normal operations as the State of Emergency ends and the perceived threat of COVID-19 in Timor-Leste subsides.

TABLE 46. HOW BUSINESSES ARE ADAPTING (R1 & R2)

Adaptation	Round 1	Round 2
Setting up hand-washing stations or requiring hand washing	73%	58%
Requiring staff and/or customers wear masks	48%	28%
Requiring physical/ social distancing between customers and/or staff	47%	36%
Changing the operating hours	31%	9%
Changing communication with buyers /sellers	19%	13%
Changing business model	16%	13%
Changing the products we're stocking	15%	3%

Most businesses had not received help from an organization or business network. The proportion of micro businesses that had received help was slightly higher than for other business sizes. This was nearly identical between the two rounds.

TABLE 47. HELP RECEIVED FROM ORGANIZATIONS OR BUSINESS NETWORKS (R1 & R2)

Help received	Round 1		Round 2	
	#	%	#	%
No	122	69%	105	69%
larger	34	19%	26	17%
small	33	19%	28	18%
micro	55	31%	51	34%
Yes	56	32%	47	31%
larger	11	6%	10	7%
small	12	7%	6	4%
micro	33	19%	31	20%
Total	178	100%	152	100%

Among those respondents who had received assistance (R1 56 / R2 47), Table 48 outlines the type of support they had received. COVID-19 information was the most common support received in both rounds. In Round 2, respondents were also asked if they had received financial services support, but none reported receiving this. **Between Round 1 and Round 2 there were substantial increases in support across all support types, except for minor differences in ‘supply chain support’ and ‘transportation support’.** It should, however, be noted that 69% of respondents in both rounds had not received any support.

TABLE 48. TYPE OF SUPPORT RECEIVED (R1 56 / R2 47)

Type of support	Round 1		Round 2	
	#	%	#	%
COVID-19 health information / guidance	50	28%	40	85%
Market information / guidance	25	14%	21	45%
Hygiene supplies (soap, hand sanitizer, etc.)	13	7%	12	26%
Water supplies (buckets, tanks, tippy-taps for handwashing, etc)	12	7%	14	30%
Marketing / advertising information / guidance	3	2%	8	17%

Type of support	Round 1		Round 2	
	#	%	#	%
Subsidies	2	1%	11	23%
Supply chain support	1	1%	-	-
Transportation support	1	1%	-	-

In Round 2, respondents were asked what additional support they required. The most common responses were 'market information/guidance' (47%) and 'regulation of food prices' (43%). They were also asked who could provide that support. 'National Government' was the most common response (65%), followed by 'Municipal government' (58%). 'Local government' and 'NGOs/development programs' were also common, both receiving 51% of responses.

TABLE 49. TYPES OF ADDITIONAL SUPPORT DESIRED BY RESPONDENTS (R2)

Type of desired support	#	%
Market information / guidance	72	47%
Regulation of food prices (e.g. rice)	66	43%
COVID-19 health information / guidance	61	40%
Water supplies (buckets, tanks, tippy-taps for handwashing, etc)	39	26%
Hygiene supplies (soap, hand sanitizer, etc.)	35	23%
Stimulus payments	34	22%
Other	12	8%
Supply chain support	11	7%
Transportation support	9	6%

Government support was received by 10% of respondents in Round 1, but this increased to 43% in Round 2. In Round 2, micro businesses were much more likely to have received government support than the other business sizes.

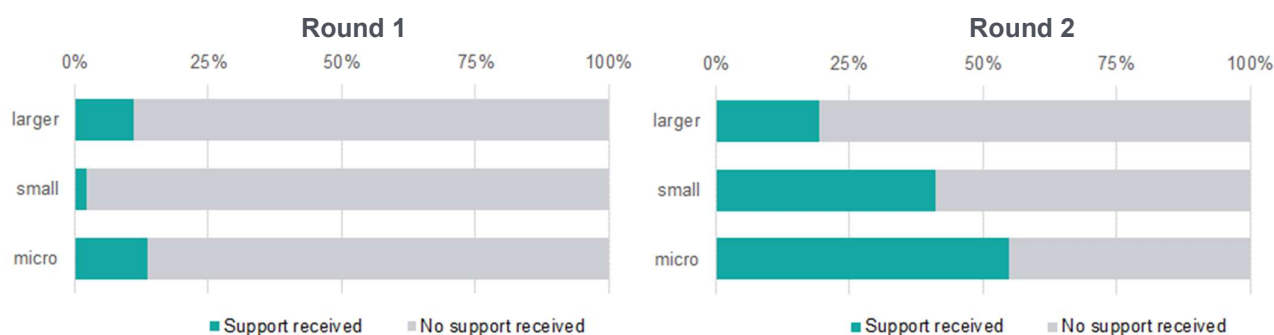


FIGURE 7. GOVERNMENT SUPPORT BY BUSINESS SIZE (R1 & R2)

TABLE 50. GOVERNMENT SUPPORT (R1 & R2)

Government support	Round 1		Round 2	
	#	%	#	%
Support received	18	10%	66	43%
larger	5	3%	7	5%
small	1	1%	14	9%
micro	12	7%	45	30%
No support received	160	90%	86	57%
Larger	40	22%	29	19%
Small	44	25%	20	13%
micro	76	43%	37	24%
Total	178	100%	152	100%

Among those respondents who had received government support (R1 18 / R2 63), the most notable trend was a substantial increase in respondents reporting government support in the form of 'regulation of food prices (e.g. rice)'.

TABLE 51. TYPE OF GOVERNMENT SUPPORT RECEIVED (R1 18 / R2 63)

Government support type	Round 1		Round 2	
	#	%	#	%
COVID-19 health information / guidance	16	89%	35	56%
Market information / guidance	14	78%	20	32%
Hygiene supplies (soap, hand sanitizer, etc.)	2	11%	5	8%
Regulation of food prices (e.g. rice)	1	6%	55	87%
Stimulus payments	1	6%	5	8%
Water supplies (buckets, tanks, tippy-taps for handwashing, etc)	1	6%	1	2%
Supply chain support	-	-	1	2%
Transportation support	-	-	-	-

A series of question on the GoTL's \$100 COVID-19 household payment were asked in Round 2. In total, 95% of respondents felt that the payment was needed, 80% had received the payments themselves, and 39% of respondents reported knowing of households that should have gotten the payment but missed out. Table 52 shows how the respondents who received the payment (121) reported spending the money.

TABLE 52. HOW USD 100 PAYMENT WAS USED (R2)

Use for \$100 payment	#	%
Bought food	110	91%
Bought fuel for cooking	55	45%
Education expenses	46	38%
Soap and detergent	44	36%
Medicine and health expenses	37	31%
Bought stock for the business	30	25%
Bought water	27	22%
Savings	11	9%
Bought fuel for motorbike/vehicle	8	7%
Family, cultural or social events	6	5%
Repaid debts	3	2%
Other (specify)	1	1%
Loan to others	-	0%

Conclusion

The findings from the 2020 Market Resilience Assessment indicate that businesses are facing ongoing operational challenges that are affecting both owners and their staff. While many aspects of the situation have improved during the May - July period, a substantial part of Timor-Leste's business community is still suffering financial effects from the COVID-19 restrictions. Profits are reported to be low despite a trend of customers returning to shops, and supply and transport difficulties are still faced by many business owners. The provision of information on COVID-19 is widespread in the Timorese business community, with most feeling well informed and satisfied with the quality of information they have received. Material support for both households and businesses is increasing. The trend of decreasing precautions taken by local businesses is not unexpected given the end of the State of Emergency and easing of immediate concern around COVID-19 in Timor-Leste, but ought to be monitored as the COVID-19 crisis continues around the world.

A copy of the Rapid Market Resilience Assessment tool is available on request. Please email kdobson@mercycorps.org.

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