



# **Profile of Traditional Biomass Fuel Suppliers**

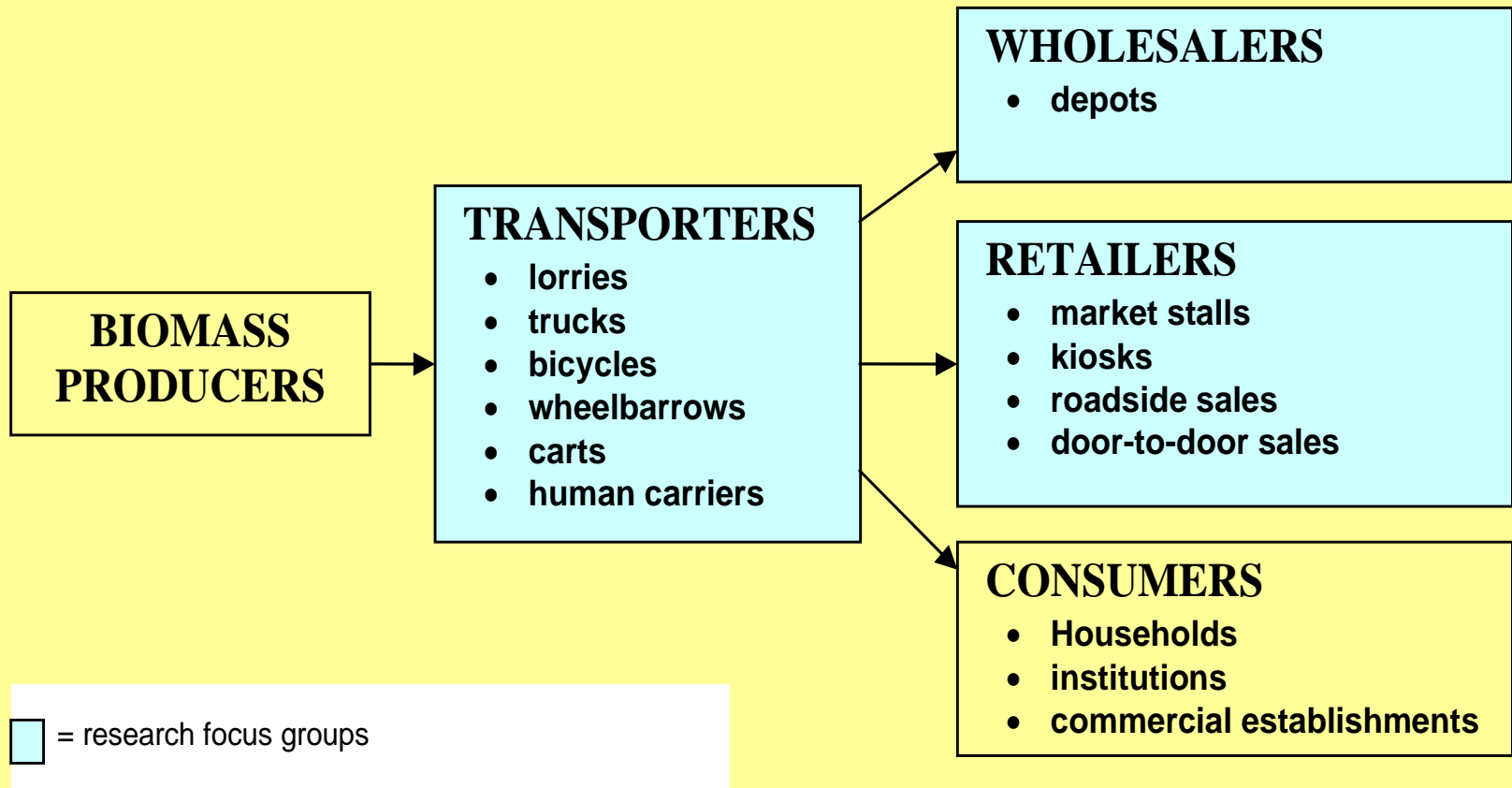
**Fuel Substitution National Stakeholder Workshop**

**Presentation by EAA Ltd**

**November 2002, Nairobi**



# Key Stakeholders: Who are they and how do they operate?





# Biomass producers: Charcoal harvesting areas

- ❖ Rangelands - Machakos, Narok, Laikipia, Muranga/Makuyu, Kajiado and Voi
- ❖ High potential: Karura, Nyahururu, Nakuru, Aberdares range, Uasin Gishu, Mau forest and generally mt. Kenya forest ecosystem
- ❖ In the rangeland collected as '**FREE GOOD**' and in high potential areas - **illegally** acquired from government forest and other trust land or
- ❖ Grown on '**FARMERS LAND ON MORE OR LESS SUSTAINABLE BASIS**'.



# Transporters

- ❁ Motorized Transporters (Lorries and Trucks)
  - bring charcoal and wood from as far as hundreds of miles into the city.
- ❁ Non-motorized transporters – (human carriers, bicycles, pushcarts and wheelbarrows). In most cases they transport charcoal to very short distances, always not more than five kilometers and link up vendors with household consumers.

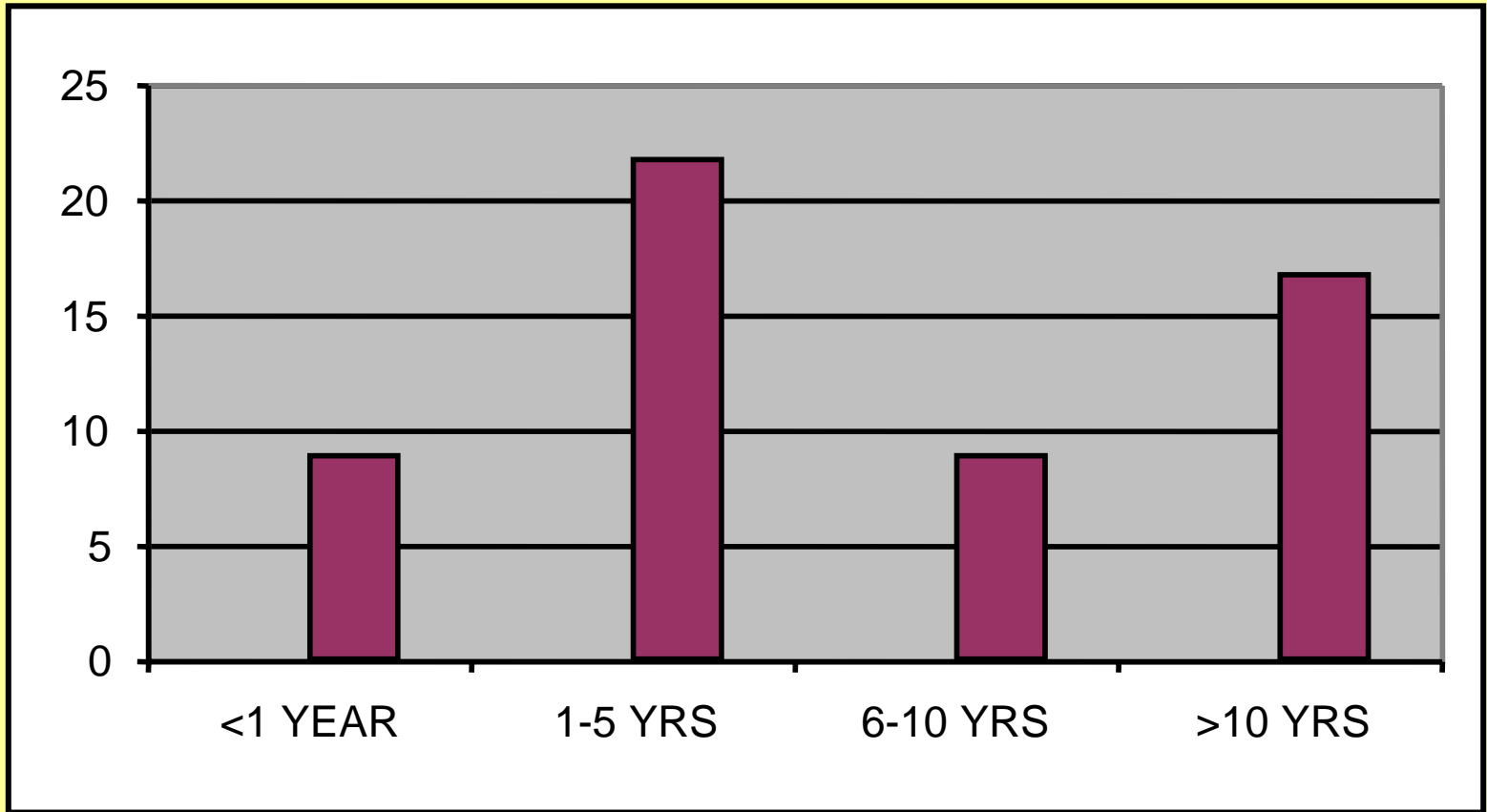


# Vendors: Wholesalers & Retailers

- **Wholesalers or depot owners:** Composed of serious traditional fuel traders often with storage depots and are dedicated to selling traditional fuels - charcoal and/or wood.
- **Retailers:** Range from depot owners to roadside and door-to-door traders. In between there are dedicated retailers, non-dedicated kiosks operators who beside selling TF trade in other commodities



# Time spent in business





# Livelihood Circumstances: Average age, Gender & Status

<b>NO OF QUESTIONNAIRES</b>	<b>58</b>
AGE MODE	38
AVERAGAE	37.20
<b>GENDER</b>	
MALE(1)	42 (72%)
FEMALE(2)	16 (28%)
<b>MARITAL STATUS</b>	
MARRIED(1)	44 (76%)
SINGLES(2)	9 (16%)
OTHERS(3)	3 (8%)



# Livelihood Circumstances: Education Level



- ☞ Sector dominated by primary & secondary school drop outs
- ☞ Few have a college education, but these are 'tarmacking' as they sell charcoal





# Livelihood Circumstances: Average Income & Social Assets

## Average Income

- Most vendors in the category of retailers interviewed earn an average net profit of KES 300.00 per day, which translates to 10,000.00 per month. This is way above low ranking civil servants and primary school teachers. This amount supports their daily households needs adequately.

- Social Assets

The category of wholesalers has the greatest social capital (are trusted by consumers and retailers as they have a higher level of reliability). Capable of giving credit to trust-worthy customers

Both wholesalers and Retailers belong to Strong social grouping which religion and community comprises:.

<b>Religion</b>	<b>34.5%</b>
<b>Community</b>	<b>28%</b>
<b>No response</b>	<b>37.5%</b>



# Vulnerability Context (1)

External and other factors over which traders have little control include:

## 1. Seasonal factors

- Charcoal supply is usually low during rainy season & prices are high due to among others:
  - ☞ Transporters have more options and charcoal not given high priority due to many barriers - licence for every trip, means parting with more money
  - ☞ Tend to transport other foods e.g. potatoes, cabbages, carrots etc. are not harassed by police and hence make more money.
  - ☞ Many roads are impassable, charcoal scarcity - charcoal takes long to burn
    - During school holidays & public holidays there is higher demand
    - Xmass season - low sales as people travel up-country
- **2. Consumer Preferences and Competition**
- consumer shift from one vendor to the other in search of better quality charcoal
  - ☞ Presence of other fuels eg briquettes, kahawa charcoal?
  - ☞ Many new entrants and retailers in the business.
  - ☞ Improved stove programmes = reduced consumption of TF?? More data needed



# Vulnerability Context (2)

## 3. Policies, regulation and restrictions (decrees)

- Harassment by police (roadblocks) YET License for Transportation of charcoal is free (Legal Notice No. -- The Forest Act (CAP 385). Presidential decree !!!
- Lack of awareness (fear created by decrees) of the type of licence to be bought - most have category 100 for general trade instead of category 405 which is for charcoal - Potential for harassment and bribery.
- Subsidies on kerosene, LPG & electricity ??? Our view not backed by data (“There is a market even if there was free kerosene!!” - vendor)

## 4. Underground/illegal business

- Because the above is not observed, business is carried out illegally by those capable of corrupting the system, good guys have been driven out of the business.
- Which means that low quality charcoal ie sacks often filled with dust or unburned wood delivered, Suppliers are not reliable.

## 5. Non-recognition of TF sector

- lack of support mechanisms – low bargaining power
- viewed as low status occupation
- No credit facilities are available



# Gender issues

- In Kikuyu 8 women 21 men(peri-urban); Wendani - 3 women 8 men (peri-urban); In Mukuru 8 women and 25 men). Women involved in order to subsidize earnings, women less corrupt, depot don't give them credit - to avoid domestic quarrels. Hence women have low representation. Here are some examples (KE).
- Although men and women are evenly represented among non-motorised transporters in Nairobi, it is mainly women who transport head and backloads, while men mostly use bicycles, wheelbarrows and carts.
- Women will suffer more from the lack of credit facilities, presidential decrees, continued corruption etc.
- Women are more likely to suffer from seasonal and other changes that makes charcoal scarce and expensive



# Livelihood Strategies

- Travel at night to beat police road blocks
- Bribery and corruption
- Hiking of prices
- Hoarding (mostly done by non-dedicated)
- Transporting charcoal hidden under other goods such as vegetables
- Member of social association which occasionally assist with loans and or credit facilities
- Buying in bulk in peak season-basically for depots