



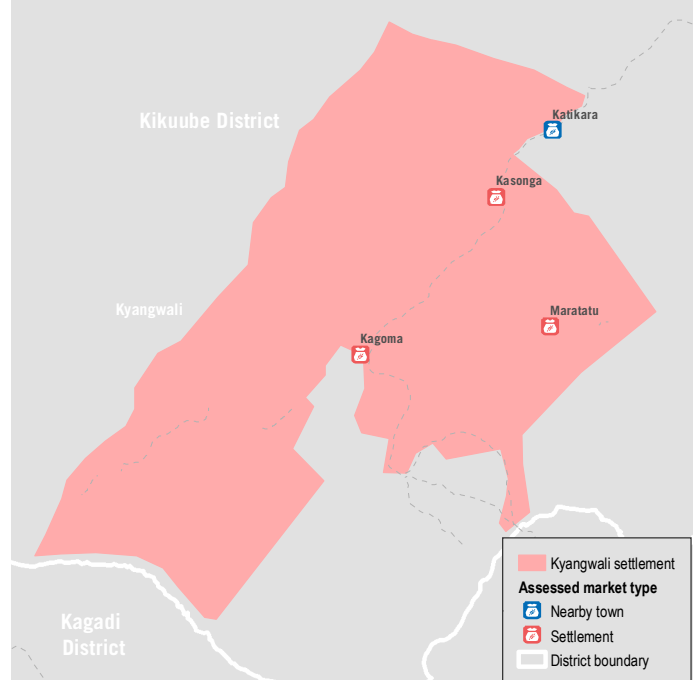
Market Factsheet: Kyangwali Settlement UGANDA

CONTEXT AND METHODOLOGY

Uganda is one of the world's top refugee-hosting states, having taken in more than 1.3 million refugees who exhibit diverse vulnerability profiles and capacities to cope.¹ Due to these variations, there is a need for a humanitarian delivery system that allows actors to more closely align the modality and amount of assistance provided with individual refugee households' economic and protection-related needs.

The objective of this market analysis, conducted under the framework of the Vulnerability and Essential Needs Assessment (VENA), was to assess market functionality and capacity in the vicinity of Uganda's refugee settlements and to understand the potential for market-based assistance to meet essential needs. Data collection took place between 9 August and 7 October 2019 in 13 refugee settlements.² Two parallel methodologies were employed: 2,820 structured individual interviews were conducted with market traders in or near each assessed settlement, supplemented by 35 semi-structured interviews with key informants who had knowledge of local markets. The assessment was led jointly by REACH, the World Food Programme (WFP), and the United Nations High Commissioner for Refugees (UNHCR), with support from five additional partners (see page 5). Findings refer solely to the situation during the data collection period and should be considered indicative only.

AREA COVERED BY FACTSHEET



MARKET AND TRADER CHARACTERISTICS

Key informants (KIs) interviewed noted that the markets operated on a daily basis, with some having particular days of the week during which trade was particularly active. They further noted there are several large markets in and near Kyangwali, with over 300 registered traders, that were a mixture of refugees, host community members, and traders from neighboring districts. It was also observed that these larger markets were predominantly made of semi-permanent structures.

4 Total number of markets assessed near this settlement (via **136** trader interviews and **3** key informant interviews)

Gender of interviewed traders:



33.8% Female
66.2% Male

Population group of interviewed traders:



33.8% Host community
66.2% Refugee

23.5% of traders interviewed reported employing at least one other person.

Top 3 nationalities of interviewed traders:



Classification of traders interviewed:³



Top 3 most common types of market customers reported by interviewed traders:³





SUPPLY, DEMAND, AND PRICES

According to KIs interviewed, demand for market items was reportedly driven by seasonality, as well as the distribution of cash assistance. Demand for food items, in particular, such as maize flour and beans was reported to rise during periods of refugee cash distributions due to refugees' increased purchasing power. They also noted that demand for maize flour and beans often decreased during the harvesting season, rose as the planting season approached, and then peaked during the height of the planting season. KIs highlighted that demand for scholastic materials increased during the start of school terms and was low during school holidays.

Sources, prices, and restocking data for selected items⁴ sold in or near this settlement, as reported by interviewed traders:

Commodity	Most common source of item	Item price in markets inside this settlement (October 2019) ⁵	Median # of days that remaining stock is estimated to last	Estimated median amount of time item remains in stock before sale
Laundry soap	Retailer in the subcounty	4,000 UGX ⁶ /Kg	10.5 days	One to four weeks
Sanitary pad (disposable)	Retailer in the subcounty	3,500 UGX /packet	30 days	Less than one week
Dry cells	Retailer in the subcounty	2,000 UGX /pair	14 days	One to four weeks
Exercise books	Retailer in the subcounty	300 UGX /piece	25 days	One to four weeks
Jerry can (plastic, 20 L)	Retailer outside the subcounty	6,000 UGX /piece	30 days	One to four weeks
Blanket (cotton)	Retailer outside the subcounty	No data	12.5 days	One to four weeks
Saucepan	Retailer outside the subcounty	15,000 UGX /piece	30 days	One to four weeks
Mingle (wooden stirrer)	retailer_subcounty	1,000 UGX /piece	20 days	One to four weeks
Panga (knife)	Retailer outside the subcounty	6,000 UGX /piece	30 days	One to four weeks
Hoe	Retailer outside the subcounty	10,000 UGX /piece	30 days	One to four weeks
Mud bricks (unfired)	Own production	60 UGX /piece	14 days	One to four weeks
Grass thatch	Own production	7,000 UGX /bundle	12 days	No consensus
Charcoal	Own production	1,250 UGX /Kg	7 days	Less than one week
Firewood	Own production	170 UGX /Kg	5 days	Less than one week

Seasonal fluctuations in supply for selected items⁴ sold in or near settlements in Southwest, Uganda, as reported by key informants (KIs):⁷

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sept	Oct	Nov	Dec
Maize flour	High	High	High	High	High	High	High	High	High	High	High	High
Beans (dried, nambale)	High	High	High	High	High	High	High	High	High	High	High	High
Sorghum grain	High	High	High	High	High	High	High	High	High	High	High	High
Cassava (whole, fresh)	High	High	High	High	High	High	High	High	High	High	High	High
Leafy vegetables	High	High	High	High	High	High	High	High	High	High	High	High
Vegetable oil	High	High	High	High	High	High	High	High	High	High	High	High
Cooking salt	High	High	High	High	High	High	High	High	High	High	High	High
Tilapia (smoked)	High	High	High	High	High	High	High	High	High	High	High	High
Milk (fresh)	High	High	High	High	High	High	High	High	High	High	High	High
Laundry soap	High	High	High	High	High	High	High	High	High	High	High	High
Sanitary pad (disposable)	High	High	High	High	High	High	High	High	High	High	High	High
Dry cells	High	High	High	High	High	High	High	High	High	High	High	High
Torch	High	High	High	High	High	High	High	High	High	High	High	High
Exercise books	High	High	High	High	High	High	High	High	High	High	High	High
Jerry can (plastic, 20 L)	High	High	High	High	High	High	High	High	High	High	High	High
Plastic basin	High	High	High	High	High	High	High	High	High	High	High	High
Blanket (cotton)	High	High	High	High	High	High	High	High	High	High	High	High
Mingle (wooden stirrer)	High	High	High	High	High	High	High	High	High	High	High	High
Panga (knife)	High	High	High	High	High	High	High	High	High	High	High	High
Hoe	High	High	High	High	High	High	High	High	High	High	High	High
Steel roofing nails	High	High	High	High	High	High	High	High	High	High	High	High
Nylon rope	High	High	High	High	High	High	High	High	High	High	High	High
Eucalyptus poles	High	High	High	High	High	High	High	High	High	High	High	High
Mud bricks (fired)	High	High	High	High	High	High	High	High	High	High	High	High
Mud bricks (unfired)	High	High	High	High	High	High	High	High	High	High	High	High
Grass thatch	High	High	High	High	High	High	High	High	High	High	High	High
Charcoal	High	High	High	High	High	High	High	High	High	High	High	High
Firewood	High	High	High	High	High	High	High	High	High	High	High	High

Legend: Supply ■ High season (increased) ■ Low season (decreased) ■ Baseline levels / No high or low season






BARRIERS TO MARKET ACCESS⁸

KIs reported that markets are generally accessible to everyone within and outside the settlement as they are centrally located. They noted that traders have limited security concerns on their way to and from the markets. However, KIs noted that traders had expressed some concerns related to the increasing cases of theft and ethnic tensions. KIs suggested installing security lights, investigating cases of theft, and encouraging awareness campaigns by non-governmental organizations to promote safety and security.

9.3% of households (HHs) reported facing barriers when trying to access marketplaces.

Of this 9.3%, top 3 most commonly reported barriers:³

Long distance to the market		85%
Disability		17.5%
Theft		7.5%

% of households that reported mainly accessing marketplaces using the following modes of transport:

86.1%	Walking
13.2%	Boda boda (motorcycle taxi)
0.5%	Bicycle



Median travel time reported by households to get to and from the nearest marketplace selling food:

30 min

51.5% of interviewed traders reported having faced a security incident related to operating their business.

Of this 51.5%, top 3 most commonly reported types of incidents:³

Theft		92.9%
Physical attacks by authorities		10%
Verbal harassment by authorities		5.7%

Top 3 most common triggers for security incidents reported by interviewed traders:³

Money/business disputes		98.6%
Social discrimination		1.4%
Distance related		1.4%

MARKET OPERATIONS & PRICES

KIs reported no shocks that affected the traders' activities and market operations. With regards to the prices of commodities sold, they noted that prices of some of the items remained constant throughout the year and were reportedly not affected by demand, whilst other commodities experienced some price fluctuations. For example, prices for non-food items such as soap, jerry cans, and scholastic items remained constant, whilst prices for food items changed according to seasons and related to supply and demand for the items.

18.4% of interviewed traders reported having a license to operate in their market.

39% of interviewed traders reported paying market dues.

% of interviewed traders reporting using the following types of storage:

95.6%	Own storage
3.6%	Rented storage



22.8% of interviewed traders reported having taken out at least one loan in the past to support their business.

Estimated median amount of outstanding debt reported by interviewed traders:⁹

100,000 UGX

% of interviewed traders reporting that they currently use each of the following sources of capital:³

Own savings		91.2%
Credit or loans		19.1%
Shared with HH/business partners		1.5%
Other		0.7%

Estimated median monthly expenditures reported by interviewed traders in the following categories:

Market dues (past month)	4,000 UGX
Rental of storage space	50,000 UGX
Round-trip transport to restock retailled items	20,000 UGX
Transaction cost to obtain new stock (loading, unloading, storage, tax, etc.)	0 UGX


ABILITY TO SCALE UP

Most common predictions of interviewed traders regarding their ability to meet increased demand stimulated by cash programmes:¹⁰

Category of commodities
In case of doubled demand...

	Would you be able to stock enough of your current items to meet the demand?	If yes, how long would it take you to obtain additional stock to meet the demand?	Would you be able to obtain this amount using only your current supplier?	If unable to stock enough, what would make it most difficult for you to increase your supply?
Sanitary items	Yes (100%)	One week (53.8%)	Yes (88.5%)	Not applicable
Household items	Yes (98.4%)	One week (61.7%)	Yes (98.3%)	Lack of quality supply
Shelter and livelihoods items	Yes (98.3%)	One week (50.9%)	Yes (98.2%)	No consensus
Lighting items	Yes (89.3%)	One week (48%)	Yes (84%)	Lack of capital
Educational items	Yes (96.4%)	One week (40.7%)	Yes (92.6%)	Lack of capital
Cooking fuel	Yes (95.8%)	One week (95.7%)	Yes (95.7%)	Government restrictions

SUPPLEMENT: FOOD ITEMS

In Adjumani, Kiryandongo, Kyangwali, and Palabek refugee settlements, no data was collected on individual food items as part of the VENA. The key indicators in this section are drawn from a May 2019 market assessment conducted by WFP in these four settlements, which focused only on food items but relied on a methodology similar to that used for the VENA. In each settlement, 60 traders were purposively sampled to ensure representation of retailers, wholesalers, and open-air vendors. Though not all indicators here are precisely comparable to those in the VENA, they are presented as a complement to the NFI-focused VENA indicators analysed earlier in this factsheet. Findings refer solely to the situation during the data collection period and should be considered indicative only.

Sources, prices, and restocking data for assessed food items sold in or near this settlement, as reported by traders:

Commodity	Most common source of item	Item prices in markets inside this settlement (October 2019) ⁴	Most common frequency with which traders restock this item
Maize flour	Wholesaler outside the settlement	2,855 UGX / kg	One week
Sorghum grain	Wholesaler within the settlement	1,539 UGX / kg	One week
Beans	Farmers within the settlement	2,592 UGX / kg	One week
Leafy vegetables	No consensus	1,738 UGX / g	No consensus
Cassava (fresh)	Farmers outside of the settlement	383 UGX / g	One week
Milk	No data	1,133 UGX / ml	No data
Dried fish	Other	16,710 UGX / g	One week
Cooking oil	Wholesaler outside the settlement	6,250 UGX / bottle	One week
Salt	Wholesaler outside the settlement	1,333 UGX / packet	One week

Most common predictions of interviewed traders regarding their ability to meet increased demand stimulated by cash programmes⁹:

Category of commodities
In case of doubled demand...

	Would you be able to increase supply of your current items to meet the demand?	If yes, how long would it take you to double your stock to meet the demand?	If unable to stock enough, what would make it most difficult for you to increase your supply?
Fresh food	Yes (80%)	2 to 4 weeks (62.5%)	No consensus
Non-fresh food	Yes (92.7%)	1 to 2 weeks (52.6%)	Lack of capital



Endnotes

1 Figures based on United Nations High Commissioner for Refugees (UNHCR) and Office of the Prime Minister (OPM) refugee population figures, updated as of September 2019, retrieved from <https://ugandarefugees.org/en/country/uga> on 8 November 2019.

2 For the purposes of sampling and analysis, the 18 settlements in Adjumani district were grouped into a single refugee hosting location.

3 Respondents were able to select more than one option when answering this question.

4 In total, 34 market commodities were assessed, but due to space limitations, a selection are displayed in this factsheet. The list of selected commodities was based on a subjective determination of which items were most central to Ugandan households, and was then modified to ensure representation of all assessed categories of items. Data on other assessed commodities is available upon request. Note that in Adjumani, Kiryandongo, Kyangwali, and Palabek settlements, data on individual food items was not collected as part of the VENA; partial data is presented in the 'Supplement: Food Items' box on page 4.

5 Price data was derived from WFP, Minimum Expenditure Basket in Uganda: Joint Price Monitoring, October 2019, retrieved from <https://reliefweb.int/report/uganda/minimum-expenditure-basket-uganda-joint-price-monitoring-october-2019> on 12 December 2019.

6 The Ugandan shilling to United States dollar exchange rate was 3,668.05 on 24 December 2019. <https://www.xe.com/>

7 Seasonality calendars were constructed on a regional level to capture variations in agriculture and livelihoods across Uganda while encompassing enough interviews to allow for meaningful aggregation. The regions used were: Northwest (Adjumani, Bidibidi, Imvepi, Lobule, Palabek, Palorinya, Rhino, Kiryandongo) and Southwest (Kyaka II, Nakivale, Oruchinga, Rwamwanja, Kyangwali).

8 All indicators referencing the household were derived from the VENA household-level assessment, which was conducted concurrently with this market assessment and in the same settlements. A total of 5,737 household interviews were conducted between 12 August and 7 October 2019. Methodological details of this component of the VENA are available [here](#).

9 Among traders who reported non-zero expenditures and/or debt in each of the following categories.

10 All indicators in the box that follows are subjective, with results based on self-reporting by market traders. A full capacity assessment to objectively determine these traders' ability to scale up was not conducted.

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