



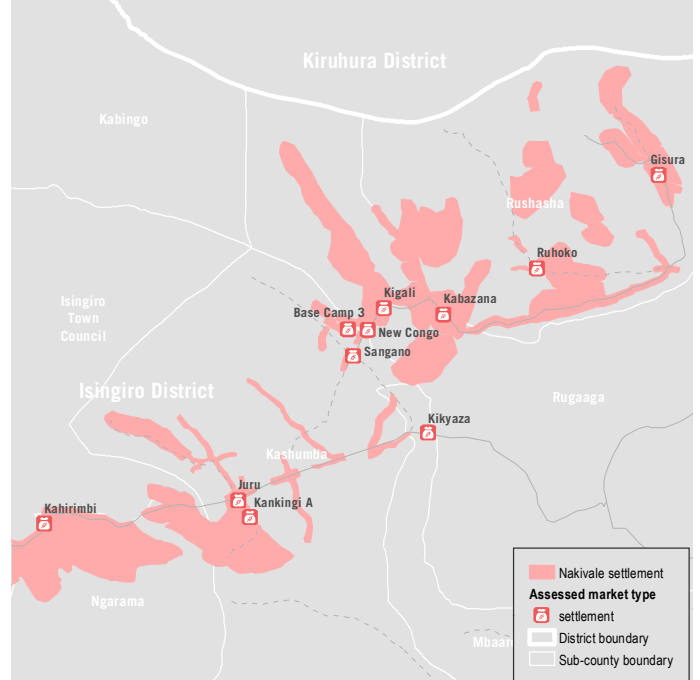
Market Factsheet: Nakivale Settlement UGANDA

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) reported that refugees accessing New Congo Market within Nakivale settlement were able to purchase both food and non-food items in the market. The market was found to serve both refugees and host community members, and had more than 100 traders operating every day, typically in the evening hours. The KI noted that traders were required to have trading licenses from the sub-county authority in order to operate in the market, but were able to set the prices of their commodities themselves.

12 Total number of markets assessed near this settlement (via **129** trader interviews and **1** key informant interviews)

Gender of interviewed traders:



43.4% Female
56.6% Male

Population group of interviewed traders:



29.5% Host community
70.5% Refugee

4% of traders interviewed reported employing at least one other person.

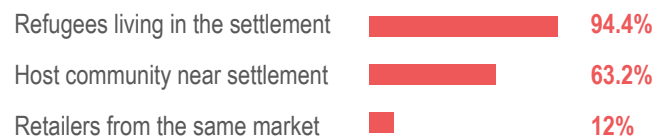
Top 3 nationalities of interviewed traders:



Classification of traders interviewed:³



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





SUPPLY, DEMAND, AND PRICES




The demand for commodities such as cooking salt, charcoal, and firewood reportedly remained constant throughout the year. The demand for other items, however, particularly food commodities, such as beans, sorghum, and cassava, fluctuated throughout the seasons. Moreover, changes in demand was also found with farming equipment items. For instance, the demand for pangas (knives) was reported to increase during the harvesting seasons, due to the increased need by farmers. The supply of certain items also experienced similar fluctuations due to seasonality. During the dry seasons, the supply of some food items was low, caused by the lack of harvest.

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 in or near 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
Maize flour	Retailer in the subcounty	2,000 UGX ⁶ /Kg	14 days	One to four weeks
Beans (dried, nambale)	Farmers within the subcounty	3,000 UGX /Kg	10 days	One to four weeks
Sorghum grain	Farmers within the subcounty	2,000 UGX /Kg	10 days	More than one month
Cassava (whole, fresh)	Retailer in the subcounty	667 UGX /g	4 days	Less than one week
Leafy vegetables	Farmers within the subcounty	625 UGX /g	1 days	Less than one week
Laundry soap	Retailer outside the subcounty	4,000 UGX /Kg	14 days	One to four weeks
Sanitary pad (disposable)	Retailer outside the subcounty	3,000 UGX /packet	30 days	More than one month
Exercise books	Retailer outside the subcounty	500 UGX /piece	15 days	One to four weeks
Jerry can (plastic, 20 L)	Retailer outside the subcounty	6,000 UGX /piece	30 days	More than one month
Blanket (cotton)	Retailer outside the subcounty	No data	90 days	More than one month
Mud bricks (unfired)	Own production	100 UGX /piece	30 days	More than one month
Grass thatch	No data	No data	No data	No data
Charcoal	Retailer outside the subcounty	1,667 UGX /Kg	7 days	One to four weeks
Firewood	Retailer outside the subcounty	159 UGX /Kg	22 days	More than one month

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	Supply	High season (increased)	Low season (decreased)	Baseline levels / No high or low season	High season (increased)	Low season (decreased)	Baseline levels / No high or low season	High season (increased)	Low season (decreased)	Baseline levels / No high or low season	High season (increased)	Low season (decreased)
Beans (dried, nambale)	Supply	High season (increased)	Low season (decreased)	Baseline levels / No high or low season	High season (increased)	Low season (decreased)	Baseline levels / No high or low season	High season (increased)	Low season (decreased)	Baseline levels / No high or low season	High season (increased)	Low season (decreased)
Sorghum grain	Supply	High season (increased)	Low season (decreased)	Baseline levels / No high or low season	High season (increased)	Low season (decreased)	Baseline levels / No high or low season	High season (increased)	Low season (decreased)	Baseline levels / No high or low season	High season (increased)	Low season (decreased)
Cassava (whole, fresh)	Supply	High season (increased)	Low season (decreased)	Baseline levels / No high or low season	High season (increased)	Low season (decreased)	Baseline levels / No high or low season	High season (increased)	Low season (decreased)	Baseline levels / No high or low season	High season (increased)	Low season (decreased)
Leafy vegetables	Supply	High season (increased)	Low season (decreased)	Baseline levels / No high or low season	High season (increased)	Low season (decreased)	Baseline levels / No high or low season	High season (increased)	Low season (decreased)	Baseline levels / No high or low season	High season (increased)	Low season (decreased)
Vegetable oil	Supply	High season (increased)	Low season (decreased)	Baseline levels / No high or low season	High season (increased)	Low season (decreased)	Baseline levels / No high or low season	High season (increased)	Low season (decreased)	Baseline levels / No high or low season	High season (increased)	Low season (decreased)
Cooking salt	Supply	High season (increased)	Low season (decreased)	Baseline levels / No high or low season	High season (increased)	Low season (decreased)	Baseline levels / No high or low season	High season (increased)	Low season (decreased)	Baseline levels / No high or low season	High season (increased)	Low season (decreased)
Tilapia (smoked)	Supply	High season (increased)	Low season (decreased)	Baseline levels / No high or low season	High season (increased)	Low season (decreased)	Baseline levels / No high or low season	High season (increased)	Low season (decreased)	Baseline levels / No high or low season	High season (increased)	Low season (decreased)
Milk (fresh)	Supply	High season (increased)	Low season (decreased)	Baseline levels / No high or low season	High season (increased)	Low season (decreased)	Baseline levels / No high or low season	High season (increased)	Low season (decreased)	Baseline levels / No high or low season	High season (increased)	Low season (decreased)
Laundry soap	Supply	High season (increased)	Low season (decreased)	Baseline levels / No high or low season	High season (increased)	Low season (decreased)	Baseline levels / No high or low season	High season (increased)	Low season (decreased)	Baseline levels / No high or low season	High season (increased)	Low season (decreased)
Sanitary pad (disposable)	Supply	High season (increased)	Low season (decreased)	Baseline levels / No high or low season	High season (increased)	Low season (decreased)	Baseline levels / No high or low season	High season (increased)	Low season (decreased)	Baseline levels / No high or low season	High season (increased)	Low season (decreased)
Dry cells	Supply	High season (increased)	Low season (decreased)	Baseline levels / No high or low season	High season (increased)	Low season (decreased)	Baseline levels / No high or low season	High season (increased)	Low season (decreased)	Baseline levels / No high or low season	High season (increased)	Low season (decreased)
Torch	Supply	High season (increased)	Low season (decreased)	Baseline levels / No high or low season	High season (increased)	Low season (decreased)	Baseline levels / No high or low season	High season (increased)	Low season (decreased)	Baseline levels / No high or low season	High season (increased)	Low season (decreased)
Exercise books	Supply	High season (increased)	Low season (decreased)	Baseline levels / No high or low season	High season (increased)	Low season (decreased)	Baseline levels / No high or low season	High season (increased)	Low season (decreased)	Baseline levels / No high or low season	High season (increased)	Low season (decreased)
Jerry can (plastic, 20 L)	Supply	High season (increased)	Low season (decreased)	Baseline levels / No high or low season	High season (increased)	Low season (decreased)	Baseline levels / No high or low season	High season (increased)	Low season (decreased)	Baseline levels / No high or low season	High season (increased)	Low season (decreased)
Plastic basin	Supply	High season (increased)	Low season (decreased)	Baseline levels / No high or low season	High season (increased)	Low season (decreased)	Baseline levels / No high or low season	High season (increased)	Low season (decreased)	Baseline levels / No high or low season	High season (increased)	Low season (decreased)
Blanket (cotton)	Supply	High season (increased)	Low season (decreased)	Baseline levels / No high or low season	High season (increased)	Low season (decreased)	Baseline levels / No high or low season	High season (increased)	Low season (decreased)	Baseline levels / No high or low season	High season (increased)	Low season (decreased)
Mingle (wooden stirrer)	Supply	High season (increased)	Low season (decreased)	Baseline levels / No high or low season	High season (increased)	Low season (decreased)	Baseline levels / No high or low season	High season (increased)	Low season (decreased)	Baseline levels / No high or low season	High season (increased)	Low season (decreased)
Panga (knife)	Supply	High season (increased)	Low season (decreased)	Baseline levels / No high or low season	High season (increased)	Low season (decreased)	Baseline levels / No high or low season	High season (increased)	Low season (decreased)	Baseline levels / No high or low season	High season (increased)	Low season (decreased)
Hoe	Supply	High season (increased)	Low season (decreased)	Baseline levels / No high or low season	High season (increased)	Low season (decreased)	Baseline levels / No high or low season	High season (increased)	Low season (decreased)	Baseline levels / No high or low season	High season (increased)	Low season (decreased)
Steel roofing nails	Supply	High season (increased)	Low season (decreased)	Baseline levels / No high or low season	High season (increased)	Low season (decreased)	Baseline levels / No high or low season	High season (increased)	Low season (decreased)	Baseline levels / No high or low season	High season (increased)	Low season (decreased)
Nylon rope	Supply	High season (increased)	Low season (decreased)	Baseline levels / No high or low season	High season (increased)	Low season (decreased)	Baseline levels / No high or low season	High season (increased)	Low season (decreased)	Baseline levels / No high or low season	High season (increased)	Low season (decreased)
Eucalyptus poles	Supply	High season (increased)	Low season (decreased)	Baseline levels / No high or low season	High season (increased)	Low season (decreased)	Baseline levels / No high or low season	High season (increased)	Low season (decreased)	Baseline levels / No high or low season	High season (increased)	Low season (decreased)
Mud bricks (fired)	Supply	High season (increased)	Low season (decreased)	Baseline levels / No high or low season	High season (increased)	Low season (decreased)	Baseline levels / No high or low season	High season (increased)	Low season (decreased)	Baseline levels / No high or low season	High season (increased)	Low season (decreased)
Mud bricks (unfired)	Supply	High season (increased)	Low season (decreased)	Baseline levels / No high or low season	High season (increased)	Low season (decreased)	Baseline levels / No high or low season	High season (increased)	Low season (decreased)	Baseline levels / No high or low season	High season (increased)	Low season (decreased)
Grass thatch	Supply	High season (increased)	Low season (decreased)	Baseline levels / No high or low season	High season (increased)	Low season (decreased)	Baseline levels / No high or low season	High season (increased)	Low season (decreased)	Baseline levels / No high or low season	High season (increased)	Low season (decreased)
Charcoal	Supply	High season (increased)	Low season (decreased)	Baseline levels / No high or low season	High season (increased)	Low season (decreased)	Baseline levels / No high or low season	High season (increased)	Low season (decreased)	Baseline levels / No high or low season	High season (increased)	Low season (decreased)
Firewood	Supply	High season (increased)	Low season (decreased)	Baseline levels / No high or low season	High season (increased)	Low season (decreased)	Baseline levels / No high or low season	High season (increased)	Low season (decreased)	Baseline levels / No high or low season	High season (increased)	Low season (decreased)

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






BARRIERS TO MARKET ACCESS⁸

KIs reported that traders generally felt safe and were involved in relatively few security incidents. However, they pointed out that the market size was limited and that there was not a wide range of food items. Moreover, the KI underlined the essential need for the construction of roads to improve traders' accessibility to the markets, as well as to enable traders from other areas to access the settlement.

4.5% of households (HHs) reported facing barriers when trying to access marketplaces.

Of this 4.5%, top 3 most commonly reported barriers:³

Long distance to the market		81.3%
Verbal harassment by refugees		18.8%
Physical attacks by refugees		6.3%

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

80.3%	Walking
16%	Boda boda (motorcycle taxi)
3.1%	Bicycle






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



30 min

11.6% of interviewed traders reported having faced a security incident related to operating their business.

Of this 11.6%, top 3 most commonly reported types of incidents:³

Theft		86.7%
Physical attacks by unknown people		6.7%
Verbal harassment by refugees		6.7%

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

Money/business disputes		40%
Distance-related insecurity		20%
Social discrimination		13.3%

MARKET OPERATIONS & PRICES

Prices of commodities, similarly to their supply and demand, were reported to fluctuate particularly due to seasonality. The price of food items was reported to generally increase during the dry seasons, due to the scarcity of items for sale, as well as the increased demand as households were unable to produce the commodities themselves. Moreover, the prices of charcoal and firewood were reported to increase in the rainy seasons because there was less supply. Other items, such as pencils or nylon ropes, were found to maintain a constant price throughout the year.

55.2% of interviewed traders reported having a license to operate in their market.

41.1% of interviewed traders reported paying market dues.

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

48%	Own storage
12%	Rented storage
40%	No storage



18.6% 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 **150,000 UGX**

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

Own savings		90.4%
Credit or loans		24.8%
Shared with HH/business partners		3.2%

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

Market dues (past month)	2,500 UGX
Rental of storage space	70,000 UGX
Round-trip transport to restock retailled items	20,000 UGX
Transaction cost to obtain new stock (loading, unloading, storage, tax, etc.)	3,000 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?
Fresh food	Yes (85.7%)	One week (83.3%)	Yes (66.7%)	No consensus
Non-fresh food	Yes (91.2%)	One week (64.5%)	Yes (87.1%)	Lack of capital
Sanitary items	Yes (94.1%)	One week (43.8%)	Yes (93.8%)	Lack of capital
Household items	Yes (89.7%)	One week (34.3%)	Yes (81.8%)	Lack of quality supply
Shelter and livelihoods items	Yes (88.2%)	Two weeks (36.7%)	Yes (80%)	Lack of capital
Lighting items	Yes (85.7%)	Two weeks (55.6%)	Yes (83.3%)	Lack of capital
Educational items	Yes (96.4%)	One week (55.6%)	Yes (81.5%)	Lack of supply
Cooking fuel	Yes (67.9%)	One week (63.2%)	Yes (63.2%)	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.

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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