

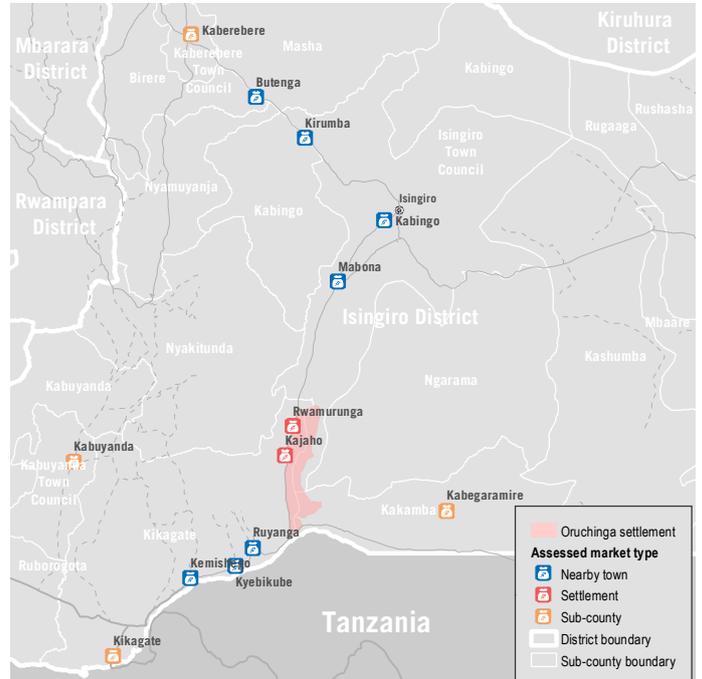


### CONTEXT AND METHODOLOGY

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.<sup>1</sup> 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.<sup>2</sup> 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

Refugees living in Oruchinga were found to access markets within and outside the settlement, and the size of those markets varied greatly. For example, Kajaho Market, the largest market within Oruchinga, was run by more than 1,500 traders operating daily, whilst Kabegaramire Market was reported to have approximately 150 traders and only operating once a week. Markets were comprised of permanent and semi-permanent structures. Key informants (KIs) noted that sub-county officials determine the license requirements per year, and the amount range from UGX 20,000 to 40,000 depending on the size of the business.

**14** Total number of markets assessed near this settlement (via **200** trader interviews and **2** key informant interviews)

Gender of interviewed traders:



Population group of interviewed traders:



**39%** Female  
**61%** Male

**89%** Host community  
**11%** Refugee

**1.1%** of traders interviewed reported employing at least one other person.

#### Top 3 nationalities of interviewed traders:



#### Classification of traders interviewed:<sup>3</sup>



#### Top 3 most common types of market customers reported by interviewed traders:<sup>3</sup>





## SUPPLY, DEMAND, AND PRICES

KIs noted that the supply and demand of certain commodities fluctuated due to seasonality throughout the year. For instance, supply and demand for shelter materials, such as grass thatch and mud-bricks, reportedly increased during the dry seasons as households looked to renovate their shelters before the rainy seasons started again. Moreover, the supply and demand for scholastic materials were found to be higher during the school term and lower during the holidays. Other items, such as salt and sanitary pads, were found to have a continuous supply and demand due to households' constant need for these commodities throughout the year.

Sources, prices, and restocking data for selected items<sup>4</sup> 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) <sup>5</sup>	Median # of days that remaining stock is estimated to last	Estimated median amount of time item remains in stock before sale
Maize flour	Retailer outside the subcounty	2,400 UGX <sup>6</sup> /Kg	2.5 days	One to four weeks
Beans (dried, nambale)	Retailer outside the subcounty	3,000 UGX /Kg	6 days	One to four weeks
Sorghum grain	Retailer outside the subcounty	1,300 UGX /Kg	20 days	One to four weeks
Cassava (whole, fresh)	Own production	455 UGX /g	3 days	Less than one week
Leafy vegetables	Own production	6,667 UGX /g	2 days	Less than one week
Laundry soap	Retailer outside the subcounty	4,000 UGX /Kg	3 days	One to four weeks
Sanitary pad (disposable)	Retailer outside the subcounty	3,000 UGX /packet	3 days	Less than one week
Exercise books	Retailer outside the subcounty	500 UGX /piece	4 days	One to four weeks
Jerry can (plastic, 20 L)	Retailer outside the subcounty	6,000 UGX /piece	2 days	One to four weeks
Blanket (cotton)	Retailer outside the subcounty	No data	20 days	More than one month
Mud bricks (unfired)	Own production	120 UGX /piece	30 days	One to four weeks
Grass thatch	Own production	No data	30 days	Less than one week
Charcoal	Retailer outside the subcounty	1,667 UGX /Kg	3 days	Less than one week
Firewood	No consensus	159 UGX /Kg	20 days	One to four weeks

Seasonal fluctuations in supply for selected items<sup>4</sup> sold in or near settlements in Southwest, Uganda, as reported by key informants (KIs):<sup>7</sup>

	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 ACCESS<sup>8</sup>

KIs reported no significant barriers faced by households to access the market. However, traders reportedly had issues with limited space and a lack of individual market stalls, which led to increased tensions and confrontations between traders. Additionally, KIs reported increasing cases of theft, especially during big market days, and suggested a need for increased security personnel in and around the market.

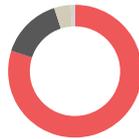
**0.8%** of households (HHs) reported facing barriers when trying to access marketplaces.

Of this 0.8%, top 3 most commonly reported barriers:<sup>3</sup>

Disability		66.7%
Long distance to the market		33.3%

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

<b>80.6%</b>	Walking
<b>14.9%</b>	Boda boda (motorcycle taxi)
<b>4.2%</b>	Bicycle



Median travel time reported by households to get to and from the nearest marketplace selling food: **30 min**

**2%** of interviewed traders reported having faced a security incident related to operating their business.

Of this 2%, top 3 most commonly reported types of incidents:<sup>3</sup>

Theft		50%
Physical attacks by unknown people		25%
Physical attack by host comm.		25%

Top 3 most common triggers for security incidents reported by interviewed traders:<sup>3</sup>

Money/business disputes		50%
None of the options listed		50%
Distance-related insecurity		25%

## MARKET OPERATIONS & PRICES

Price fluctuations were also found to be caused by seasonality, due to the changes in supply and demand. This was reported for prices of agricultural/food items that decrease during the harvesting seasons, when households are producing certain food items themselves, or during periods of in-kind distributions, when households were receiving items directly. For example, the prices of maize flour, beans, sorghum, and leafy vegetables reportedly increased during the dry seasons due to the decrease in supply. Moreover, the prices of sanitary pads, scholastic materials, and lighting items reportedly remained relatively constant throughout the year.

**72.5%** of interviewed traders reported having a license to operate in their market.

**61%** of interviewed traders reported paying market dues.

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

<b>87.8%</b>	Own storage
<b>4.4%</b>	Rented storage
<b>7.8%</b>	No storage



**40.5%** 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:<sup>9</sup> **50,000 UGX**

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

Own savings		97.1%
Credit or loans		34.8%
Shared with HH/business partners		5.9%
Support from NGOs		1%

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

Market dues (past month)	<b>3,500 UGX</b>
Rental of storage space	<b>No data</b>
Round-trip transport to restock retailled items	<b>30,000 UGX</b>
Transaction cost to obtain new stock (loading, unloading, storage, tax, etc.)	<b>10,000 UGX</b>



## ABILITY TO SCALE UP

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

### 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 (93.9%)	One week (93.5%)	Yes (100%)	No consensus
Non-fresh food	Yes (100%)	One week (75.9%)	Yes (100%)	Not applicable
Sanitary items	Yes (97.6%)	One week (62.5%)	Yes (100%)	No consensus
Household items	Yes (98.7%)	One week (77.3%)	Yes (96.6%)	Other
Shelter and livelihoods items	Yes (92.9%)	One week (52.7%)	Yes (96.7%)	Lack of capital
Lighting items	Yes (100%)	One week (50%)	Yes (100%)	Not applicable
Educational items	Yes (96.6%)	One week (57.1%)	Yes (96.4%)	No consensus
Cooking fuel	Yes (91.8%)	One week (77.8%)	Yes (95.6%)	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.

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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### Uganda Assessment Technical Working Group

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