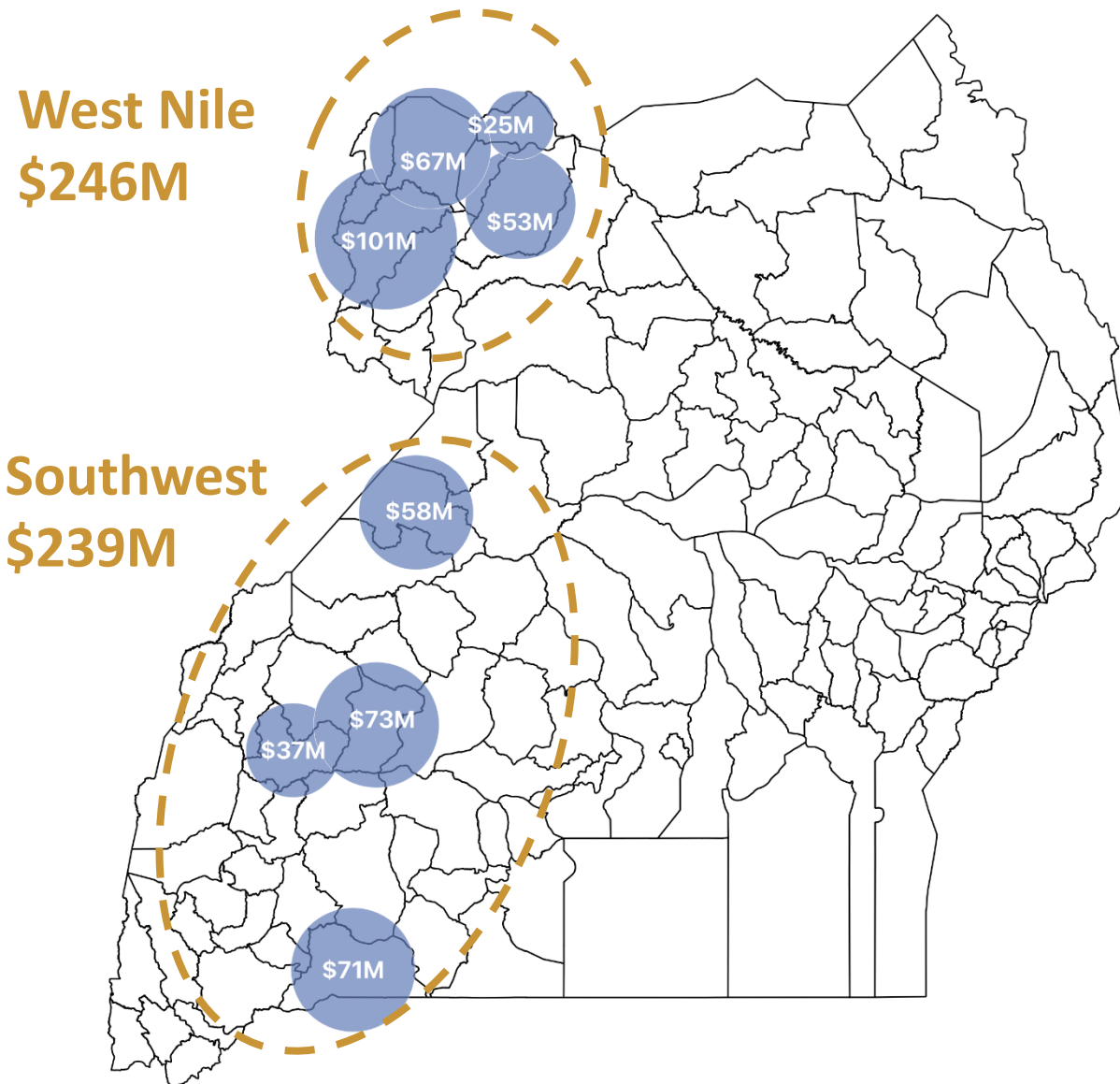


# IFC Assessments in Ugandan Refugee-Hosting Areas – Consumer and Market Study, Energy Access, Agricultural Value Chains

March 3, 2022

# Market Size of West Nile and Southwest

Breakdown by geographic area



- **\$485 million** - annual market size of eight surveyed districts
- Average monthly household expenditure: **\$37 per month**.
- Highest household spending: Adjumani - **\$54 per month**, Southwest refugees - **\$43 per month**.
- Employment rate: **70%** - Southwest, **47%** - West Nile.
- Household earnings: **\$47** - Southwest, **\$52** - West Nile.

# Breakdown of Consumption Expenditure

## Consumer goods

- Food and beverages
- Personal hygiene items
- Clothes
- Alcoholic drinks

**59%** of the total spending  
**\$21** monthly

- ✓ Cooking oil
- ✓ Fruit and vegetables
- ✓ Rice
- ✓ Meat
- ✓ Maize flour (SW)
- ✓ Tea/coffee (WN)

## Other expenditure categories

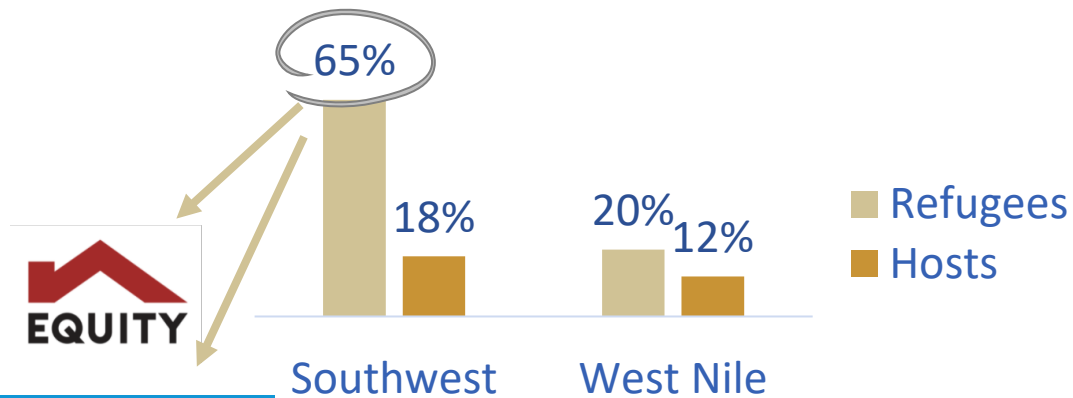
- Airtime/internet
- Health
- Transportation
- Energy
- Education

**41%** of the total spending  
**\$16** monthly (a decrease from \$21 before the pandemic)

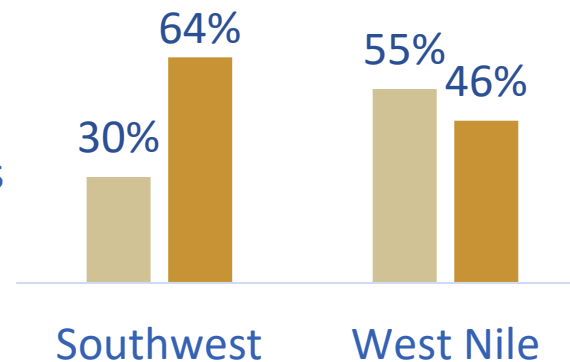
# Access to Finance

- Mobile money has the highest penetration among formal financial services (study focused on household heads)
- Southwest refugees have the highest bank account ownership because of cash transfers. Willingness to open a bank account is significant among those who do not own one yet.
- Host communities and refugees use traditional methods of saving and borrowing—most use village savings and loans associations (VSLAs) or save cash at home and borrow from VSLAs and family/friends.

### Bank account ownership



### Mobile money use



### Source of information on financial matters:

1. Family and friends
2. Community announcements (**refugees**)
3. Mass media (**hosts, WN**)
4. SMS (**WN**)

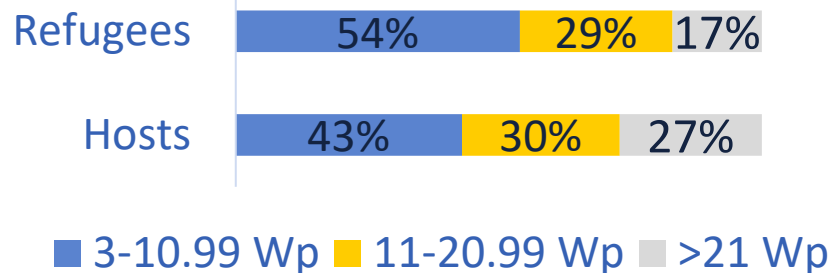
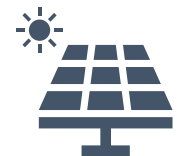
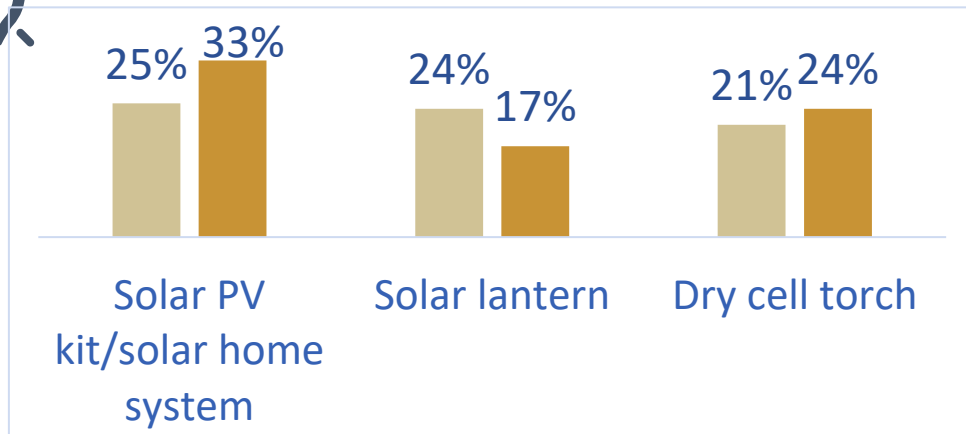


# Household Energy Sources

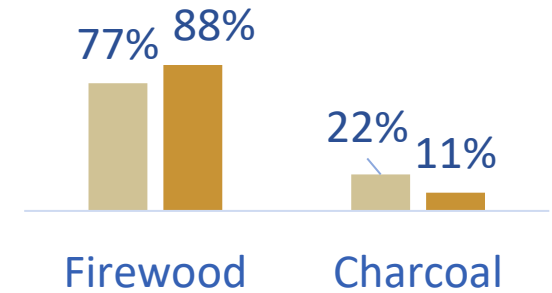
- Refugees and host communities depend on firewood and charcoal for their cooking needs
- Solar products are the main lighting sources for refugees and hosts.
- Refugees often receive solar lanterns for free, but half also reported having bought their lantern



**Top three primary lighting sources**



**Main cooking fuels**



■ Refugees  
■ Host community



**Firewood** – mainly own collection

**Charcoal** – both own production and purchase

# Fruit and Moringa Value Chains

- Cash crops such as moringa and fruit **can be sourced commercially** from refugee-hosting districts.
- **Direct sourcing from farmers** in refugee-hosting districts is preferable.
- Investments in **post-harvest handling and storage infrastructure** to lower transportation barriers and post-harvest losses are needed.



Picture source: Anteja ECG

## Existing local agro-processors operate in the following way:

- ✓ a public-private partnership with district authorities and local leaders
- ✓ long-term relationship with farmers
- ✓ contract farming
- ✓ provision of farming input
- ✓ building farmers' capacity



# Opportunities can be explored in the following sectors:

## Main sector

- Agribusiness, value chains and linkages
- Access to finance
- Access to energy for lighting, cooking and productive use

## Other possible sectors

- Plastic recycling
- Craft production and marketing
- Affordable housing construction



Thank you!