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Market Analysis Task  
Force –  
COVID-19 Market  
Monitoring

1 June 2020

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# Market Analysis Task Force – COVID-19 Market Monitoring

Conducted under the framework of:

**Uganda Cash Working Group,  
Market Analysis Task Force**

With the support of:



Funded by:



## Rationale

What is the impact of the COVID-19 outbreak on markets in refugee communities across Uganda?

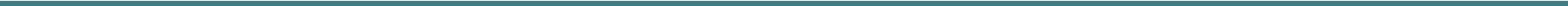
- What is the impact on **commodity prices**?
- ... and on **market functionality**?
- How do containment measures affect prices and market functionality?

→ What are the implications for **CASH assistance**?

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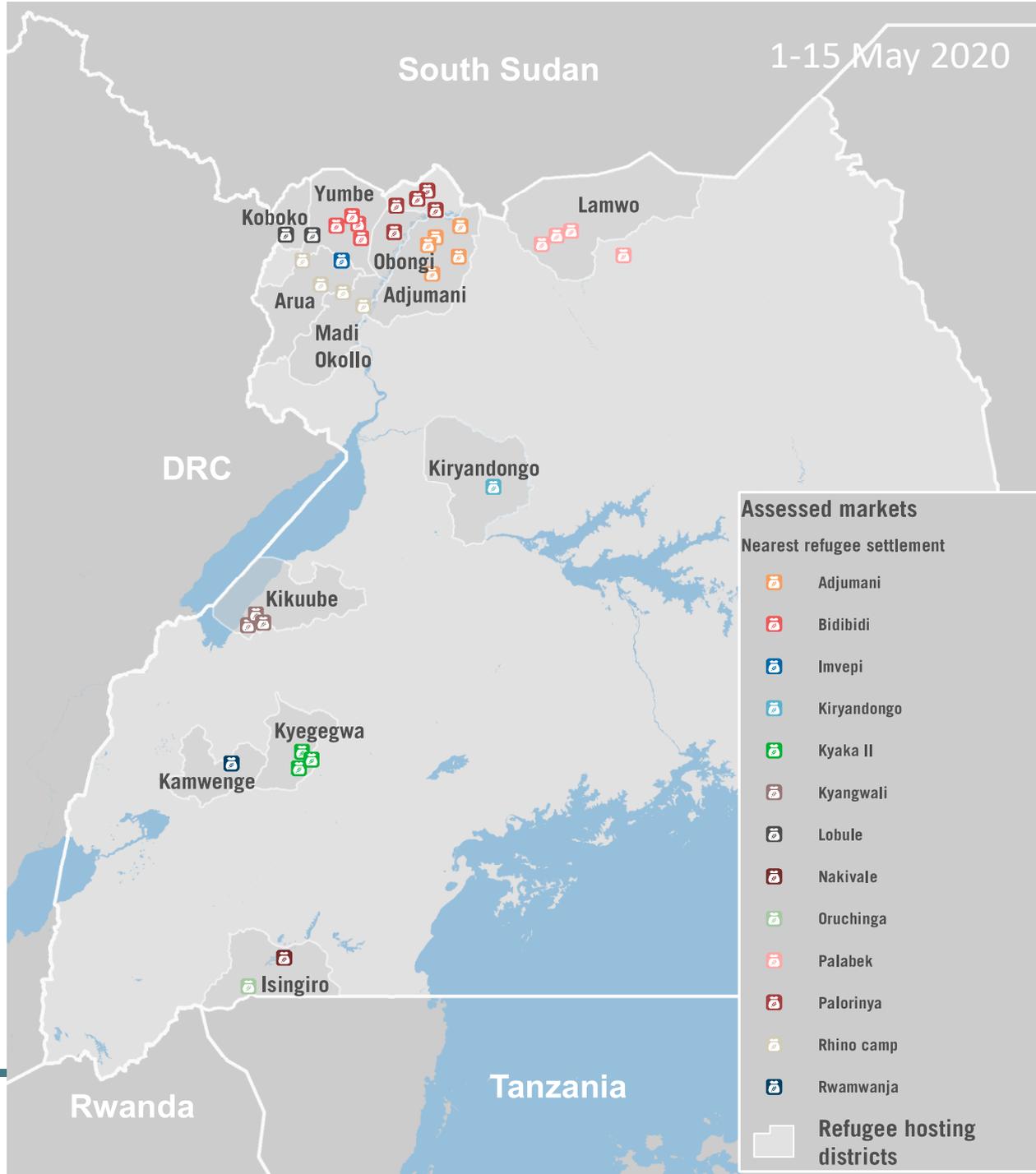
METHODOLOGY



# Methodology of the COVID-19 Market Monitoring

- Quantitative assessment monitoring **commodity prices** and **market functionality** indicators across Uganda's refugee communities
- Building on the existing **MEB price monitoring system**
- **Remote** quantitative data collection through the WFP mobile Vulnerability Analysis and Mapping (**mVAM**) unit
- Bi-monthly analysis rounds
  - ✓ Round 1: 15-30 April
  - ✓ Round 2: 1-14 May
  - ✓ Round 3: 15-31 May
  - ✓ ...

# Assessed locations



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KEY FINDINGS



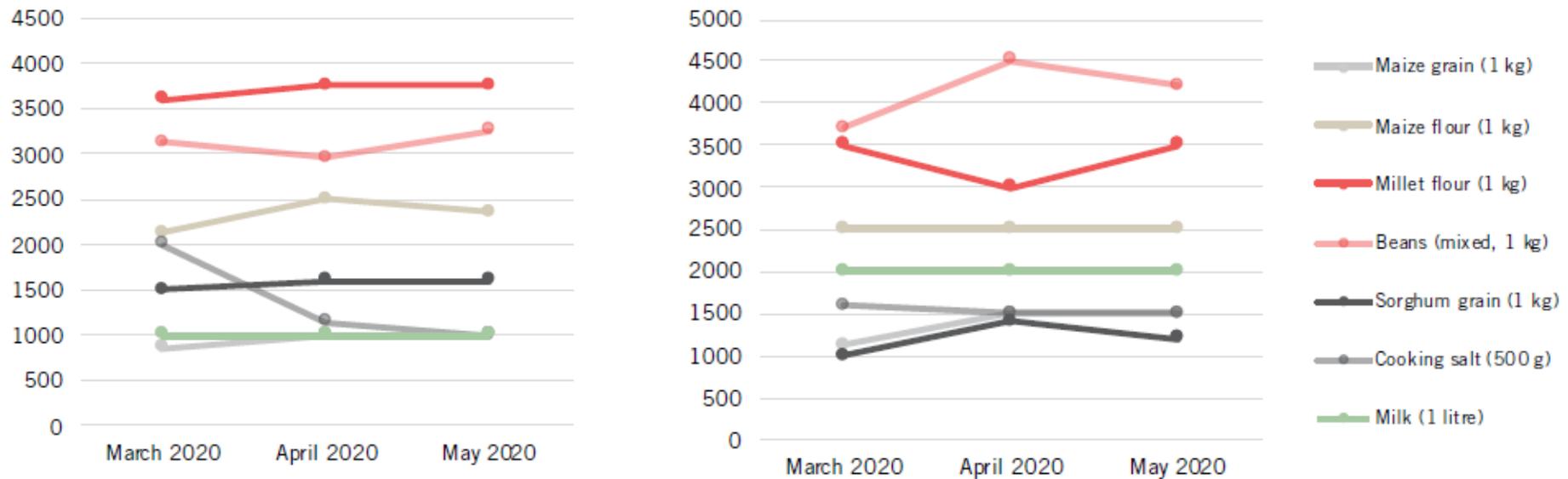
# Commodity Prices

Item (unit)	Regions												Settlements																					
	Nationwide	Southwest Region		West Nile Region		Adjumani		Bidibidi		Imvepi		Kiryandongo		Kyaka II		Kyangwaii		Lobule		Nakivale		Oruchinga		Palabek		Palorinya		Rhino Camp		Rwamwanja				
Maize grain (1 kg)	1200	+20%	1000	+16%	1500	+33%	1500	0%	1000	-10%	1500	+50%	1200	0%	1000	+5%	950	+58%	1500	+7%	1000	+25%	1000	+25%	1200	+50%	1500	-25%	1500	+20%	1000	8%	0%	
Maize flour (1 kg)	2500	+11%	2350	11%	2500	0%	2500	+5%	1350	-10%	2000	+33%	2200	-8%	2500	+11%	3000	+25%	2500	-18%	2000	0%	2000	0%	2600	-20%	3000	-13%	2000	0%	2500	+25%	0%	
Millet flour (1 kg)	3500	-3%	3750	+4%	3500	0%	4000	-9%	3500	-4%	3000	+15%	4200	+5%	3000	0%	4000	+11%	4000	-18%	3500	-3%	4000	0%	3000	-14%	3000	5%	4000	-20%	3500	+56%	0%	
Beans (mixed, 1 kg)	4000	+23%	3250	+4%	4200	+14%	5000	+35%	3250	+20%	5000	+5%	4500	+13%	3000	-8%	4000	+33%	5000	-7%	2500	-17%	3000	+7%	3500	+60%	4000	+63%	4200	0%	3500	+8%	0%	
Sorghum grain (1 kg)	1500	+27%	1600	+7%	1200	+20%	1500	+10%	1000	+120%	1650	+58%	1200	+20%	2000	0%	2000	+54%	1200	-49%	1500	0%	1500	0%	600	0%	1000	+5%	1500	+20%	1700	+3%	0%	
Cooking oil (1 litre)	6000	+7%	6000	+3%	6000	+9%	6000	0%	5000	+20%	6000	-31%	6500	+8%	6000	+7%	6000	0%	6000	+9%	5000	-11%	6000	0%	6000	+20%	6000	0%	5500	-4%	6000	+7%	0%	
Fresh cassava* (small bundle)	1000	n/a	1000	n/a	1000	n/a	2000	n/a	2000	n/a	1000	n/a	1000	n/a	1000	n/a	2000	n/a	1000	n/a	1000	n/a	1000	n/a	1000	n/a	2000	n/a	1000	n/a	1000	n/a	n/a	
Cooking salt (500 g)	1000	-47%	1000	-50%	1500	-6%	1000	+100%	1500	+7%	1500	+15%	1000	-29%	1000	-64%	1500	-17%	1000	-38%	1000	-50%	800	-60%	1000	-70%	1500	-21%	1500	-75%	1000	-64%	-17%	
Leafy greens* (small bundle)	500	n/a	500	n/a	200	n/a	1000	n/a	500	n/a	200	n/a	200	n/a	500	n/a	500	n/a	200	n/a	1000	n/a	1000	n/a	500	n/a	200	n/a	200	n/a	500	n/a	n/a	
Milk (1 litre)	2000	+67%	1000	0%	2000	0%	2000	-20%	1000	+100%	2000	0%	1800	+13%	1000	0%	2000	0%	2000	0%	1000	0%	1000	0%	2000	+67%	2000	-50%	2000	0%	2000	0%	1000	0%
Firewood* (small bundle)	2000	n/a	1250	n/a	2000	n/a	n/a	n/a	2000	n/a	n/a	n/a	n/a	n/a	n/a	n/a	2500	n/a	2250	n/a	0%	n/a	n/a	n/a	2000	n/a	3000	n/a	500	n/a	n/a	n/a	n/a	
Charcoal* (basin)	5000	n/a	7000	n/a	5000	n/a	n/a	n/a	5000	n/a	n/a	n/a	n/a	n/a	n/a	n/a	8000	n/a	6000	n/a	0%	n/a	n/a	n/a	4000	n/a	5000	n/a	4000	n/a	7000	n/a	n/a	
Laundry soap (1 kg)	3250	+400%	3375	-9%	3000	+50%	3000	0%	3500	+88%	3300	+10%	4000	0%	3000	-23%	3750	-6%	2900	+50%	3250	-7%	2000	-20%	3000	-39%	2000	+75%	3300	+45%	3500	+17%	0%	

- Since March, **most commodities** that constitute the MEB have **appreciated in price**
- **Grains** have generally appreciated more in price than other commodities like flour and cooking oil
- Aggregated national results should be interpreted with caution, as **large differences across assessed settlements prevail**

# Commodity Prices

Changes in food prices (in UGX) in Southwest (left) and West Nile (right) regions



- Price levels and changes **vary** regionally!
- Aggregated figures should be taken with a grain of salt
- ...and – where possible – **local effects** on price changes should be paid attention to

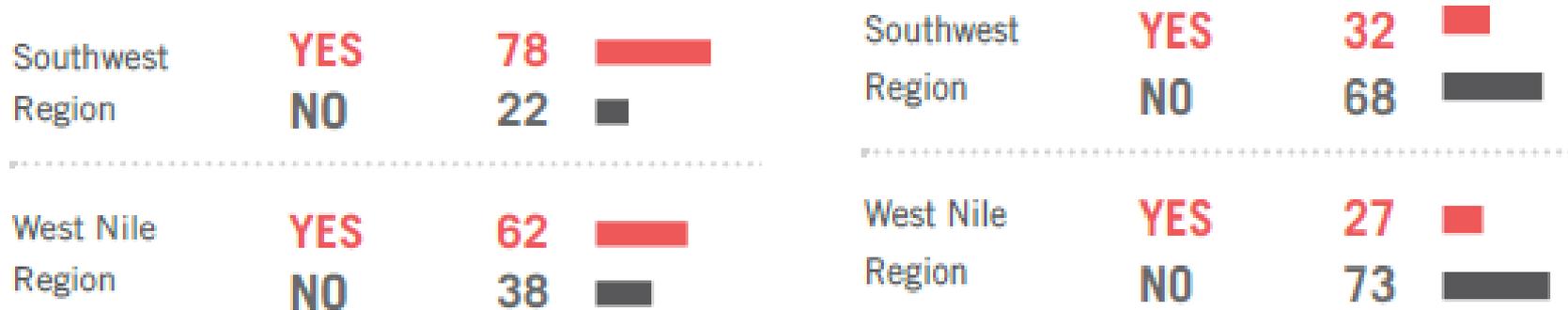
# Market Functionality

- Results show **significant impact** on the functionality of assessed marketplaces in terms of:
    - Access to markets
    - Available supply
    - Security
  - In general, markets in the **Southwest Region** appear to have been impacted more adversely than markets in the West Nile Region.
  - Overall, the **access and security appears to have improved between April and May**
  - Yet, **meeting demand** with the available supply **remains an issue**, first and foremost in the **Southwest Region!**
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# Market Functionality

- In April, most assessed marketplaces saw a **decrease in the number of both vendors and customers**

% traders reporting a decrease in the number of vendors – April (left) and May (right)

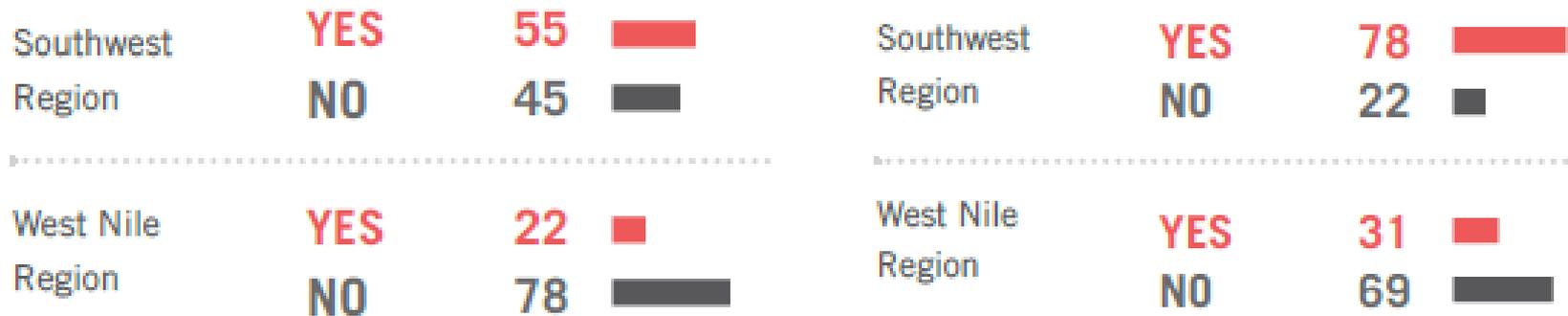


- In the Southwest region, **41%** of interviewed traders estimated a **decrease of vendors beyond 50%, in April.**
- In May,** none of the interviewed traders estimated a decrease of vendors by more than 50%

# Market Functionality

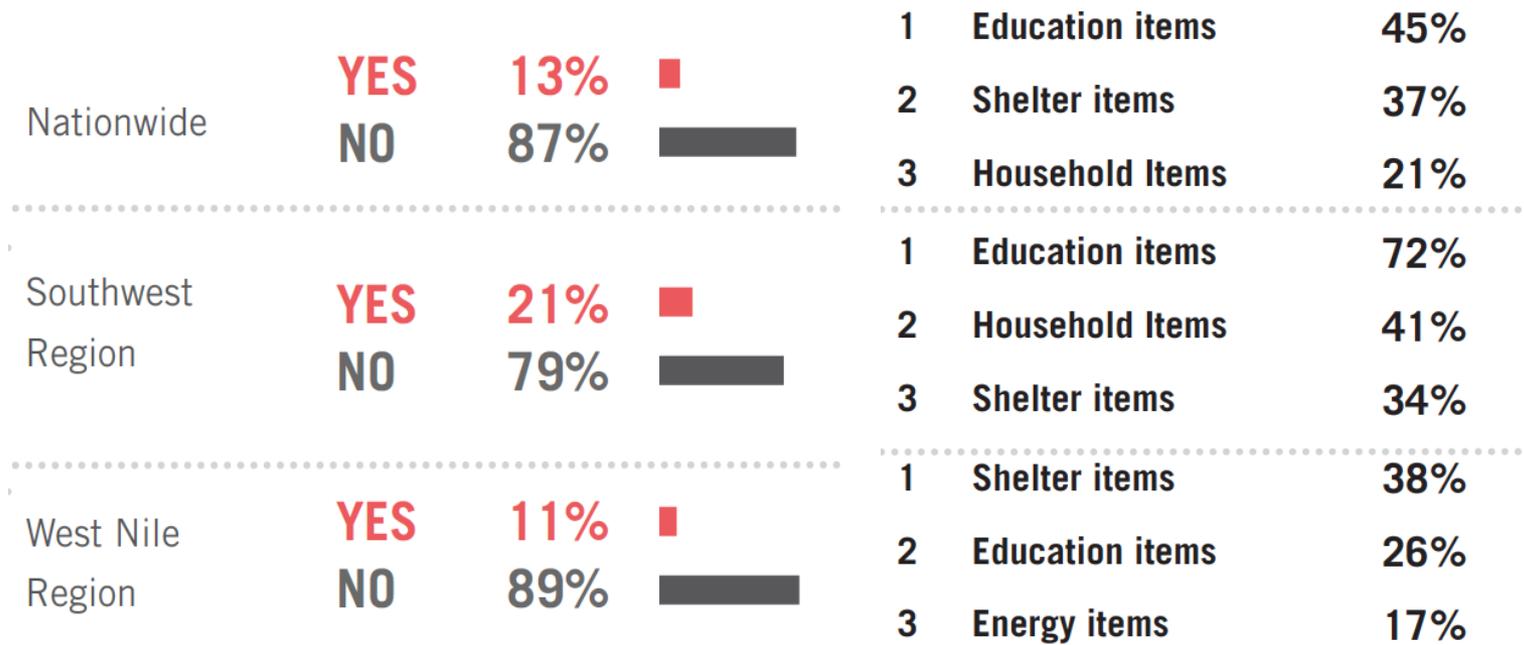
- **Meeting demand** with the available supply appears to become an **increasing problem**

% of interviewed traders reporting difficulty in obtaining enough supply to meet demand - in April (left) and May (right)



# Market Functionality

- In April, many interviewed traders reported **restrictions to transport goods to markets:**



- These appear to have decreased considerably, since May.

# Market Monitoring Factsheet April 2020

## COVID-19 Market Monitoring

Refugee Settlement Price and Market Functionality Snapshot, 15-30 April 2020

### OVERVIEW AND METHODOLOGY

Uganda is one of the top refugee-hosting countries in the world, with a protracted refugee situation and ongoing influxes of refugees from neighboring countries. The country hosts 1,423,740<sup>1</sup> refugees as of 30 April 2020, with nearly 94% of refugees living in settlements primarily in the West Nile and Southwest regions of Uganda.

Due to the changing situation since the Ugandan government introduced COVID-19 containment measures in mid-March 2020, there is a risk that markets could be significantly affected and beneficiaries receiving cash assistance may not be able to access critical goods. The main objective of this market monitoring assessment is to understand the impact of COVID-19 on commodity prices and functionality of markets in refugee communities across Uganda and provide timely information to actors on a regular basis.

Data was collected remotely through key informant telephone interviews with traders, individuals selling key commodities, in markets across 13 refugee settlement locations from 15-30 April 2020. Key informants were purposively sampled, meaning the findings are indicative only. The figures represented in this factsheet are presented at the national and regional<sup>2</sup> level, unless stated otherwise.

While limitations in remote data collection (for more details see textbox on page 2) made it impossible to calculate a reliable estimation of the April 2020 MEB price, this market monitoring exercise aims at providing accurate figures of MEB prices in future rounds.

### KEY FIGURES

- 194** traders interviewed nationwide
- 55** traders interviewed in Southwest Region
- 139** traders interviewed in West Nile Region

### Uganda Minimum Expenditure Basket (MEB)

#### Food Items (monthly)

Maize flour	44 kg	Cassava (fresh)	3 kg
Beans	27 kg	Salt	1 kg
Sorghum grain	8 kg	Leafy vegetables	15 kg
Oil	4 L	Fish (smoked)	3 kg
Milk	2 L		

#### Non-Food Items (monthly)

Laundry soap	2.25 kg	Clothing*	3,806 UGX
Firewood	165 kg		

#### Other Components (monthly)

Water*	3,750 UGX	Livelihoods*	37,705 UGX
Education**	22,667 UGX	Transport*	11,001 UGX
Health*	2,669 UGX	Communication*	4,256 UGX
Lighting*	5,000 UGX		

#### Other Items (once per year)

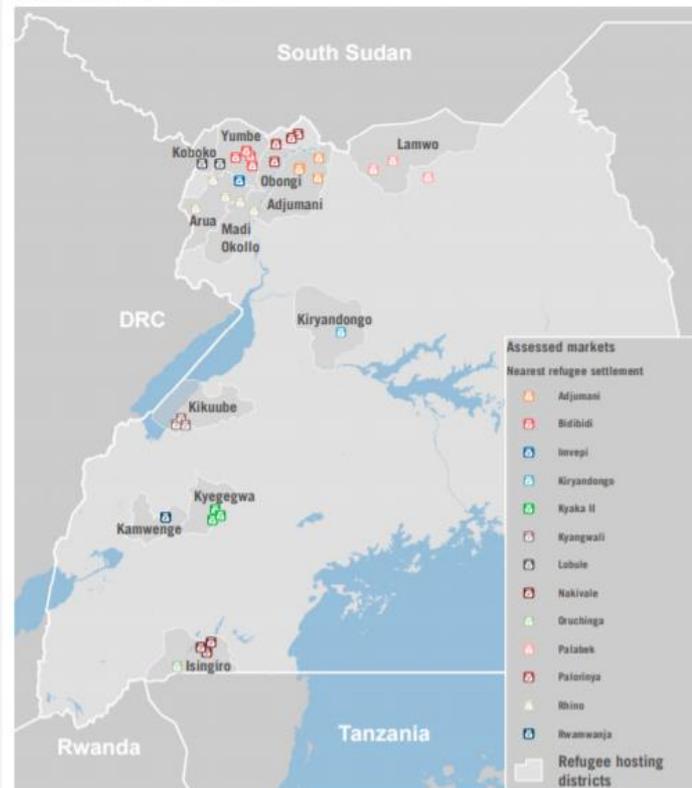
Reusable sanitary pads	8 pc	Saucepan	3 pc
Jerry can (20 L)	2 pc	Plate	5 pc
Jerry can (5 L)	1 pc	Serving spoon	2 pc
Bucket with lid	1 pc	Cup	5 pc
Blanket	5 pc	Mingle (stirrer)	2 pc

The MEB represents the minimum culturally adjusted group of items required to support a five-person refugee household in Uganda for one month. Several core items were identified as being required once per year, so the total cost was divided by 12 to calculate the monthly amount. The cost of the MEB can be used as a proxy for the financial burdens facing households in different locations.

The MEB's contents were defined by the Cash Working Group in consultation with relevant sector leads. Some components were calculated based on item cost and others through a combination of analysis of household expenditures and sector-expert opinion.

\*The starred items or components were calculated based on average sectoral or component cost per month based on expenditure data.  
\*\*Education costs were calculated based on average cost per school year.

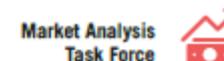
Map 1: Assessed settlements



Latest reported cost of the **full MEB** (March)<sup>3</sup>: **502,711 UGX**  
 Latest reported cost of the **food MEB** (March)<sup>3</sup>: **333,619 UGX**

# Market Monitoring Factsheet May 2020

## COVID-19 Market Monitoring



### Refugee Settlement Price and Market Functionality Snapshot, 1-15 May 2020

**UGANDA**

#### OVERVIEW AND METHODOLOGY

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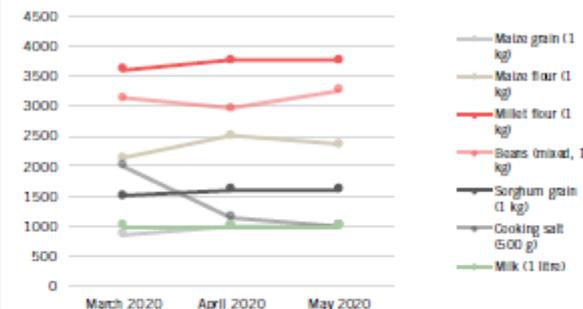
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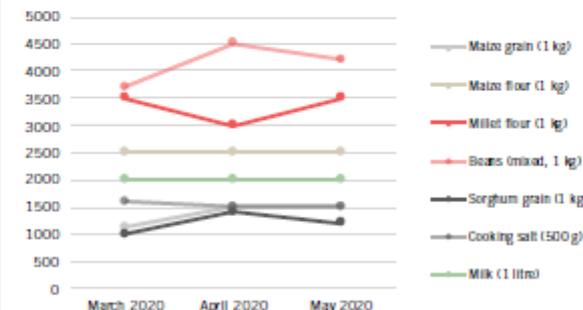
#### KEY FIGURES

- 210** traders interviewed nationwide
- 38** traders interviewed in the Southwest Region
- 172** traders interviewed in the West Nile Region

Graph 1: Changes in food prices (in UGX) in the Southwest region



Graph 2: Changes in food prices (in UGX) in the West Nile region



Latest reported cost of the **full MEB** (March)<sup>2</sup>:  
**502'711 UGX**

Latest reported cost of the **food MEB** (March)<sup>2</sup>:  
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#### Uganda Minimum Expenditure Basket (MEB)

##### Food Items (monthly)

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Questions?

Thanks for your  
attention!

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