

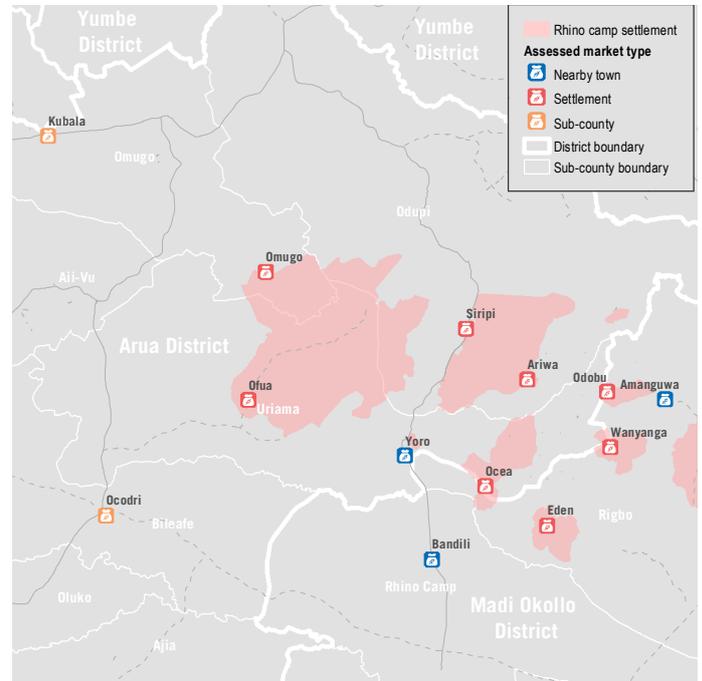


CONTEXT AND METHODOLOGY

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

Refugees living in Rhino Camp accessed markets within and outside of the settlement, which served both refugees and the surrounding host community members. The markets varied in size; some markets reportedly had under 10 traders operating, while others reportedly had more than 600 traders. While some of the markets reportedly operated every day, often in the evening, others operated on specific days of the week. The markets within and near Rhino Camp had both temporary and permanent structures depending on their size and regularity of operation.

13 Total number of markets assessed near this settlement (via **259** trader interviews and **6** key informant interviews)

Gender of interviewed traders:



54.8% Female
45.2% Male

Population group of interviewed traders:



67.2% Host community
32.8% Refugee

13.5% of traders interviewed reported employing at least one other person.

Top 3 nationalities of interviewed traders:

Uganda	67.2%
South Sudan	29.3%
Sudan	2.7%

Classification of traders interviewed:³

Retailers	76.1%
Producers	80.2%
Wholesalers	21.7%

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

Refugees living in the settlement	93.4%
Host community near settlement	86.1%
Refugees living in another settlement	21.2%



SUPPLY, DEMAND, AND PRICES

The demand and supply of commodities was reported to fluctuate throughout the year, particularly due to seasonality and the distribution of humanitarian assistance items. When items were distributed, there was decreased demand for the items among refugee consumers. While some items were reported to have a steady supply and demand throughout the year, such as laundry soap, vegetable oil, and charcoal, the demand for other items like vegetables reportedly decreased during the rainy season, as consumers were able to produce their own supply. Following harvesting seasons, the supply of items such as cassava and vegetables increased, compared to the dry seasons.

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 outside the subcounty	2,500 UGX ⁶ /Kg	10 days	One to four weeks
Beans (dried, nambale)	Retailer in the subcounty	3,000 UGX /Kg	7 days	Less than one week
Sorghum grain	Own production	1,074 UGX /Kg	10 days	Less than one week
Cassava (whole, fresh)	Own production	417 UGX /g	1 days	Less than one week
Leafy vegetables	Own production	602 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	3,500 UGX /packet	24 days	More than one month
Exercise books	Retailer outside the subcounty	500 UGX /piece	24 days	More than one month
Jerry can (plastic, 20 L)	Retailer outside the subcounty	8,000 UGX /piece	21 days	One to four weeks
Blanket (cotton)	No consensus	No data	67.5 days	More than one month
Mud bricks (unfired)	No data	75 UGX /piece	No data	No data
Grass thatch	Own production	2,000 UGX /bundle	1 days	Less than one week
Charcoal	Own production	560 UGX /Kg	2.5 days	Less than one week
Firewood	Own production	126 UGX /Kg	1 days	Less than one week

Seasonal fluctuations in supply for selected items⁴ sold in or near settlements in Northwest, 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)						
Beans (dried, nambale)	Supply	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)						
Cassava (whole, fresh)	Supply	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)						
Vegetable oil	Supply	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)						
Tilapia (smoked)	Supply	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)						
Laundry soap	Supply	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)						
Dry cells	Supply	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)						
Exercise books	Supply	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)						
Plastic basin	Supply	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)						
Mingle (wooden stirrer)	Supply	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)						
Hoe	Supply	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)						
Nylon rope	Supply	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)						
Mud bricks (fired)	Supply	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)						
Grass thatch	Supply	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)						
Firewood	Supply	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

Though the majority of KIs interviewed reported limited security issues, a few KIs within the settlement reported incidences of burglary and theft. KIs cited a need to increase police security in the markets during operating times, as well as outside of normal operating hours. Markets within the settlement were found to be easily accessible to refugees, however larger, sub-county markets were found to be far from the settlement and thus harder to access.

7.4% of households (HHs) reported facing barriers when trying to access marketplaces.

Of this 7.4%, top 3 most commonly reported barriers:³

Long distance to the market		96.8%
Disability		9.7%
SGBV		9.7%

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

97.8%	Walking
1%	Boda boda (motorcycle taxi)
0.7%	Bicycle



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

6.9% of interviewed traders reported having faced a security incident related to operating their business.

Of this 6.9%, top 3 most commonly reported types of incidents:³

Theft		77.8%
Verbal harassment by host comm.		16.7%
Physical attacks by authorities		16.7%

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

Money/business disputes		44.4%
Distance-related insecurity		11.1%
Social discrimination		11.1%

MARKET OPERATIONS & PRICES

KIs highlighted that traders had been affected by past droughts leading to their inability to supply certain commodities, such as food items in particular. They further reported that sub-county officials responded to these shocks, that had led to a disruption of activities, by providing improved seeds in order to increase the food supply. Additionally, prices were reportedly determined by the individual traders. Prices of certain commodities in the markets were reportedly also affected by seasonality throughout the year. For example, during cultivation periods, hoes and pangas (knife) reportedly experience a rise in price due to the increased demand.

31.7% of interviewed traders reported having a license to operate in their market.

76.1% of interviewed traders reported paying market dues.

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

48.6%	Own storage
12.6%	Rented storage
5.4%	Other
33.2%	No storage



9.3% 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 **145,000 UGX**

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

Own savings		87.3%
Shared with HH/business partners		7.7%
Credit or loans		4.6%
Other		1.9%

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

Market dues (past month)	5,000 UGX
Rental of storage space	20,000 UGX
Round-trip transport to restock retail items	15,000 UGX
Transaction cost to obtain new stock (loading, unloading, storage, tax, etc.)	20,000 UGX



ABILITY TO SCALE UP

Most common predictions of interviewed traders regarding their ability to meet increased demand stimulated by cash programmes¹⁰:

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 (90.2%)	One week (97.3%)	Yes (73%)	No consensus
Non-fresh food	Yes (97.6%)	One week (87.7%)	Yes (91.4%)	Lack of capital
Sanitary items	Yes (94.9%)	One week (70.3%)	Yes (89.2%)	Lack of capital
Household items	Yes (94.8%)	One week (29.1%)	Yes (82.1%)	Lack of quality supply
Shelter and livelihoods items	Yes (100%)	One week (57.1%)	Yes (82.1%)	Not applicable
Lighting items	Yes (100%)	One week (63.3%)	Yes (86.7%)	Not applicable
Educational items	Yes (100%)	One week (59.4%)	Yes (93.8%)	Not applicable
Cooking fuel	Yes (90%)	One week (97.2%)	Yes (94.4%)	No consensus

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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