Market Monitor – Refugee Hosting Areas

Refugee Settlement Price and Market Functionality Snapshot, 1-14 July 2020

UGANDA

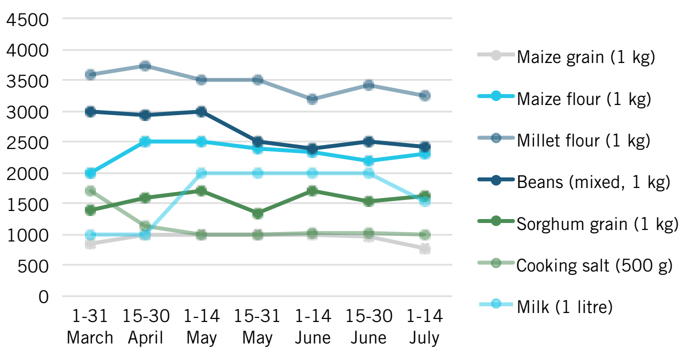
OVERVIEW AND METHODOLOGY

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 1,425,040[1] refugees as of 30 June 2020, with nearly 95% of refugees living in settlements primarily in the West Nile and Southwest regions of Uganda.

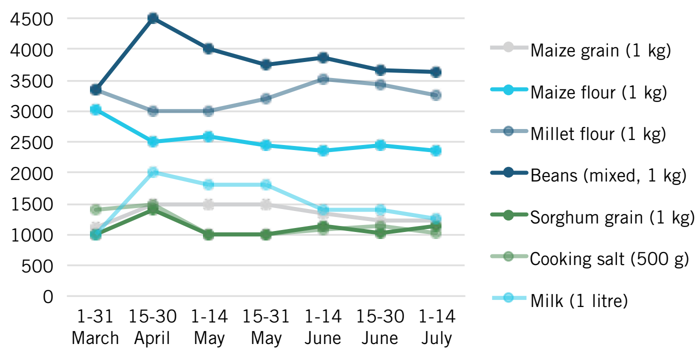
In view of this situation, the World Food Programme (WFP) has established a regular market price monitoring system across refugee settlements to inform cash-based response approaches. These monitoring efforts predate the COVID-19 crisis. However, due to the changing situation since the Ugandan government 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. In response, with the technical support of the Market Analysis Task Force and REACH in particular, this market price monitoring system has been expanded to capture crucial information to understand the impact of COVID-19 on commodity prices and functionality of markets in refugee communities across Uganda.

WFP collected the data through key informant interviews with traders, individuals selling key commodities, in markets across 13 refugee settlement locations from 1 - 14 July. Data was collected in person and loose items purchased and weighted where possible. Nakivale and Oruchinga settlements remained inaccessible for WFP data collectors. Data for these settlements was collected remotely, using the mobile Vulnerability Analysis and Mapping (mVAM) phone-based survey system. Key informants were purposively sampled, meaning the findings are indicative only. The figures represented in this factsheet are presented at the national and regional[2] levels, unless stated otherwise. In total, 160 traders were interviewed nationwide in this round, of these 49 in the Southwest Region and 111 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



FURTHER RESOURCES:

To see the past products as part of this series, click here.

To see further detail on MEB calculation methodology, click here.

KEY FINDINGS

Average cost of the **full MEB** in July 2020:
454,571 UGX
▼ **-10%** compared to the full MEB in March 2020.[3]

Average cost of the **food MEB** in July 2020:
284,393 UGX
▼ **-15%** compared to the food MEB in March 2020.

MARKET FUNCTIONALITY

- **The number of vendors present** in marketplaces has reportedly remained stable compared to last round.
- However, **the reported number of customers in marketplaces** has decreseased, especially so in the South West Region (SWR) (63% of vendors reported a decrease compared to 26% of last round). This might be related to customers anticipating their shopping in June due to the WFP's double cash distribution in May covering both May and June. Next cash distribution is yet to come. Further investigation is needed in Kyaka II where the trend is more pronounced.
- Different trends can be appreciated in the proportion of traders facing **difficulties in meeting demand.** In the SWR none of the traders (0%) reported difficulties, while in the West Nile Region (WNR) the proportion reporting difficulties has increased from 33% of last round to 62%. This is the highest proportion appreciated since April in the WNR and might be related to the fact that harvest season has not yet started in the region.
- In the SWR none of the vendors reported to be concern about their **stocks running out.** The national feature continues to be enterally driven by traders of the WNR, where 30% of them declared to be concerned.
- There is a slight increase in the proportion of traders in the SWR reporting **feeling more secure** in operating in the market (from 34% to 45%). No change was observed in the WNR.

KEY CHALLENGES

Top 3 challenges reported by traders[4]:

1	**Price fluctuation of commodities**	**21%**
2	**Lack of cash to purchase more stock**	**18%**
3	**Increased price of transportation**	**15%**

1. United Nations High Commissioner for Refugees, Uganda Comprehensive Refugee Response Portal.
2. For analysis purposes, the 13 refugee settlement locations have been aggregated to two regions: West Nile (Palorinya, Palabek, Bidi Bidi, Imvepi, Rhino Camp, Lobule, Adjumani, Kiryandongo settlements) and Southwest (Kyangwali, Rwamwanja, Kyaka, Oruchinga, Nakivale).
3. The March full MEB price constitutes the reference MEB price for refugee settlements in Uganda in 2020. For more detailed information please refer to the "Updated Guidance for Uganda Cash Working Group" (Last updated: 12.05.2020).
4. These challenges are presented at the national level.

Market Monitor – Refugee Hosting Areas

Refugee Settlement Price and Market Functionality Snapshot, 1-14 July 2020

UGANDA

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)

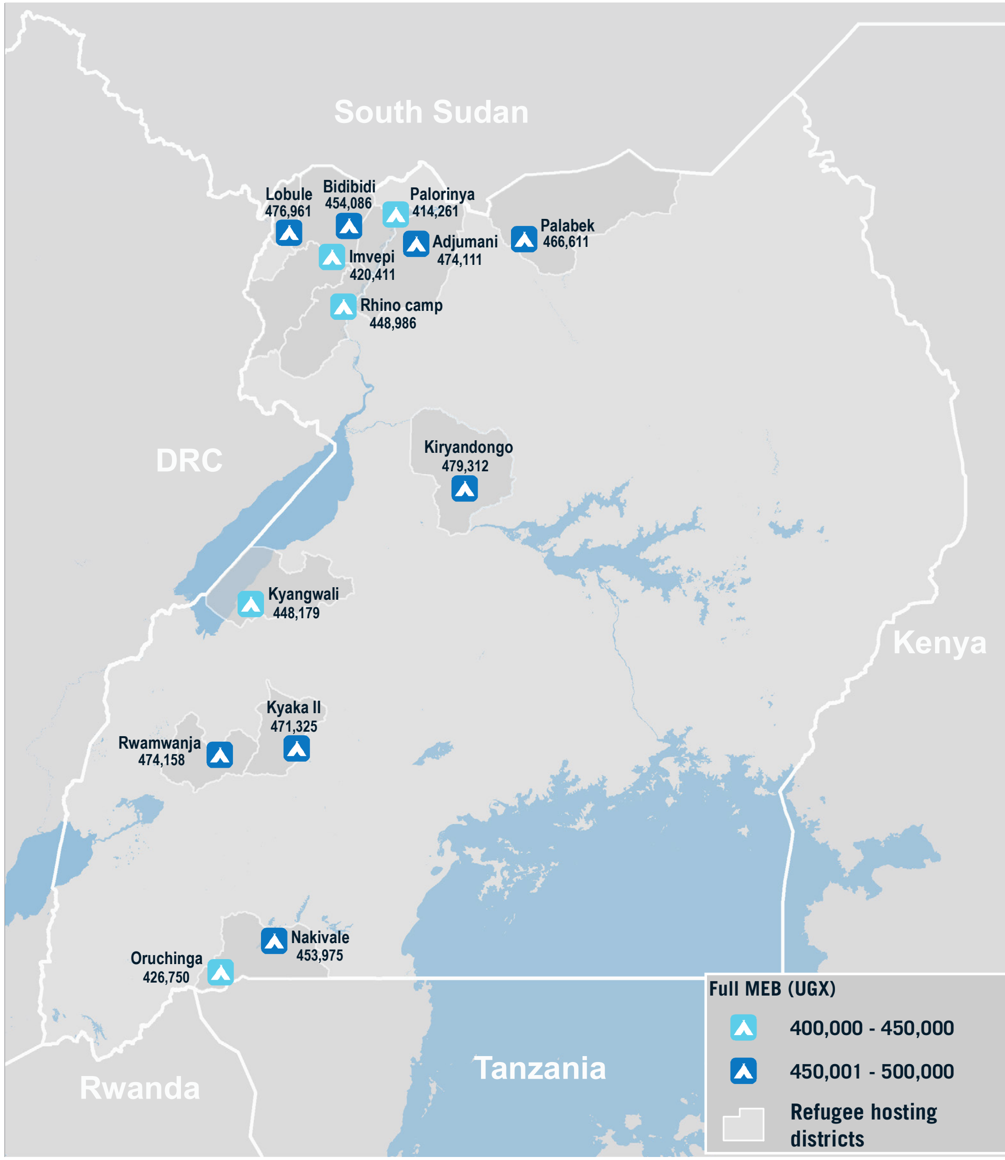
Reusable sanitary pads	8 pc	Saucepan	3 pc
Jerry can (20 L)	2 pc	Plate	5 pc
Jerry can (5 L)	1 pc	Serving spoon	2 pc
Bucket with lid	1 pc	Cup	5 pc
Blanket	5 pc	Mingle (stirrer)	2 pc

The MEB represents the minimum culturally adjusted group of items required to support a five-person refugee household in Uganda for one month. It is used as an operational tool to identify and quantify the average minimum cost of the regular or seasonal basic needs of a median household that can be covered through the local market.

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 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 of school fees per year.

Map 1: Average cost of full MEB by settlement



Settlements with the least expensive average full MEB costs:

1. Palorinya
2. Imvepi
3. Oruchinga

Settlements with the most expensive average full MEB costs:

1. Kiryandongo
2. Lobule
3. Rwamwanja

Full MEB cost percentage change since March (left) and last round (right):

Adjumani	-29%	-4%
Bidibidi	-21%	+1%
Imvepi	-6%	+7%
Kiryandongo	-10%	+0%
Lobule	-3%	-7%
Kyaka II	+1%	+11%
Kyangwali	-13%	+2%
Nakivale	+8%	-8%
Oruchinga	+2%	-15%
Palabek	-9%	+2%
Palorinya	-23%	+11%
Rhino Camp	+1%	+12%
Rwamwanja	-9%	-6%

Market Monitor – Refugee Hosting Areas

WFP

U-LEARN

Refugee Settlement Price and Market Functionality Snapshot, 1-14 July 2020 **UGANDA**

COMMODITY PRICES

Table 1: Average[5] commodity prices in Uganda Shillings (UGX)[6], by refugee settlement location, and percentage price change since March (upper)[7] and last round (15-30 June 2020, lower), respectively.[8]

		Regions						Settlements																									
	Item (unit)	Nationwide		Southwest Region		West Nile Region		Adjumani		Bidibidi		Imvepi		Kiryandongo		Kyaka II		Kyangwali		Lobule		Nakivale		Oruchinga		Palabek		Palorinya		Rhino Camp		Rwamwanja	
MEB food items	Maize flour (1 kg)	2330	-5% -1%	2302	+9% +5%	2346	-14% -4%	2343	+23% -7%	2125	-34% -6%	1700	+13% 0%	2450	+23% +7%	2447	+5% 0%	2333	+1% +11%	2250	-36% -20%	2000	+3% +5%	1725	-11% -3%	2711	-28% +2%	1475	0% -17%	2200	-12% 0%	2364	+18% +3%
MEB food items	Fish* (smoked, 1kg)	16348	n/a 0%	14633	+64% 0%	17778	n/a 0%	n/a	n/a n/a	16667	n/a 0%	n/a	n/a n/a	15000	n/a 0%	n/a	n/a n/a	13833	n/a 0%	n/a	n/a n/a	n/a	n/a n/a	n/a	n/a n/a	20000	n/a 0%	n/a	n/a n/a	n/a	n/a n/a	16667	n/a 0%
MEB food items	Beans (mixed, 1 kg)	3209	0% -2%	2431	-26% -3%	3643	+15% -1%	3944	+8% 0%	3417	+6% 13%	3000	-25% -27%	3500	-11% +4%	2394	-29% -2%	2267	-24% +18%	4125	+4% -12%	2750	-13% +22%	2325	-16% -11%	3500	+40% 0%	2900	+46% +12%	3000	-16% 0%	2350	-28% -6%
MEB food items	Sorghum grain (1 kg)	1246	+6% +7%	1619	-15% +5%	1134	+10% +11%	1139	-24% +6%	1000	+8% -5%	1100	+16% +10%	1450	+34% -5%	1867	-7% n/a	1733	+33% +1%	1562	+17% +32%	1700	+11% +42%	1350	-9% +1%	690	-31% +5%	1000	+7% -12%	1500	+42% 0%	n/a	n/a n/a
MEB food items	Cooking oil (1 litre)	5823	+2% +1%	5971	+1% +2%	5713	+3% 0%	6000	0% +2%	5062	-5% -4%	5000	-37% 0%	6000	-3% +5%	6000	+7% 0%	6000	0% 0%	5700	+6% -3%	6000	+7% +3%	6000	0% +2%	6000	+20% 0%	5720	+11% -3%	5520	-12% +1%	5857	+4% 0%
MEB food items	Fresh cassava* (1 kg)	527	n/a 0%	542	n/a 0%	511	n/a 0%	n/a	n/a n/a	511	n/a 0%	n/a	n/a n/a	667	n/a 0%	n/a	n/a n/a	500	n/a 0%	n/a	n/a n/a	n/a	n/a n/a	n/a	n/a n/a	n/a	n/a n/a	n/a	n/a n/a	n/a	n/a n/a	n/a	n/a n/a
MEB food items	Cooking salt (500 g)	1010	-57% -4%	1000	-52% -1%	1017	-60% -6%	1000	+30% 0%	1150	-53% -8%	1000	-23% -19%	1000	-48% 0%	1000	-64% 0%	1000	-44% -6%	1000	-35% 0%	1000	-47% +5%	1000	-46% -5%	1000	-80% -9%	1000	-58% 0%	920	-80% -8%	1000	-64% 0%
MEB food items	Leafy greens* (1 kg)	1646	n/a 0%	1042	n/a 0%	2250	n/a 0%	n/a	n/a n/a	2708	n/a 0%	n/a	n/a n/a	1000	n/a 0%	n/a	n/a n/a	1083	n/a 0%	n/a	n/a n/a	n/a	n/a n/a	n/a	n/a n/a	1333	n/a 0%	n/a	n/a n/a	n/a	n/a n/a	n/a	n/a n/a
MEB food items	Milk (1 litre)	1322	-7% -21%	1550	+13% -22%	1257	-14% -10%	n/a	n/a n/a	1000	0% -25%	n/a	n/a n/a	n/a	n/a n/a	n/a	n/a n/a	1667	-17% -17%	n/a	n/a n/a	1200	+20% n/a	n/a	n/a n/a	1900	+58% +6%	1000	-50% -9%	n/a	n/a n/a	n/a	n/a n/a
MEB NFI items	Firewood* (1 kg)	n/a	n/a n/a	n/a	n/a n/a	n/a	n/a n/a	n/a	n/a n/a	224	-62% 0%	n/a	n/a n/a	400	+20% 0%	n/a	n/a n/a	535	+46% 0%	n/a	n/a n/a	n/a	n/a n/a	n/a	n/a n/a	n/a	n/a n/a	n/a	n/a n/a	n/a	n/a n/a	n/a	n/a n/a
MEB NFI items	Laundry soap (1 kg)	3373	+22% -2%	3439	-3% -2%	3318	+41% -2%	3050	-13% -16%	3312	+66% 0%	3300	+10% 0%	2000	-50% -39%	3613	-7% 0%	3333	-17% -12%	3300	+65% 0%	3300	-6% -6%	3300	+32% 0%	3300	-18% 0%	3300	+65% 0%	4000	+100% 0%	3643	+21% -1%
MEB NFI items	Underwear (1 piece)	3000	n/a n/a	2500	n/a n/a	3222	n/a n/a	n/a	n/a n/a	1000	n/a n/a	n/a	n/a n/a	2000	n/a n/a	3000	n/a n/a	n/a	n/a n/a	n/a	n/a n/a	3000	n/a n/a	n/a	n/a n/a	5000	n/a n/a	n/a	n/a n/a	n/a	n/a n/a	n/a	n/a n/a
MEB NFI items	Big jerry can (20L, 1 piece)	6400	-2% n/a	6357	+4% n/a	6455	-7% n/a	5250	-13% n/a	6500	+30% n/a	n/a	n/a n/a	6375	+6% n/a	6100	+2% n/a	6667	+11% n/a	6750	-16% n/a	6000	0% n/a	n/a	n/a n/a	7000	-13% n/a	n/a	n/a n/a	n/a	n/a n/a	7000	+17% n/a
non-MEB items	Dry cells (1 packet)	1971	+13% n/a	2138	+21% n/a	1888	+4% n/a	n/a	+25% n/a	1875	n/a n/a	n/a	n/a n/a	2000	+33% n/a	2075	+4% n/a	n/a	n/a n/a	n/a	n/a n/a	n/a	n/a n/a	2300	+53% n/a	2000	+33% n/a	1750	+17% n/a	1200	-40% n/a	2500	+25% n/a
non-MEB items	Disposable torch (1 packet)	1000	-4% n/a	1000	-8% n/a	1000	0% n/a	n/a	n/a n/a	1000	0% n/a	n/a	n/a n/a	1000	-33% n/a	1000	0% n/a	n/a	n/a n/a	n/a	n/a n/a	1000	0% n/a	n/a	n/a n/a	1000	0% n/a	n/a	n/a n/a	n/a	n/a n/a	1000	0% n/a
non-MEB items	Millet flour (1 kg)	3258	-13% -5%	3265	-7% -5%	3248	-17% -5%	4000	+23% +5%	3500	-16% 0%	3200	-8% +2%	3500	-12% -7%	3033	+1% -3%	3667	0% +6%	3600	+1% 0%	3375	-6% +12%	4000	0% +4%	2833	-19% -6%	3000	-14% -23%	3000	-40% 0%	3250	+44% +2%
non-MEB items	Maize grain (1 kg)	1061	+3% -6%	778	-11% -20%	1227	+8% +1%	1374	-8% +2%	800	-20% -9%	1000	0% 0%	1200	+7% -1%	744	-22% -9%	767	+18% -21%	1262	+3% -13%	875	+7% -12%	762	-5% -31%	1200	+20% -1%	1020	-20% -6%	1500	+8% 0%	706	-24% -18%
non-MEB items	Charcoa*l (1 kg)	735	n/a 0%	1028	n/a 0%	383	-74% 0%	n/a	n/a n/a	323	-68% 0%	n/a	n/a n/a	1000	n/a 0%	909	n/a 0%	1143	+9% 0%	n/a	n/a n/a	n/a	n/a n/a	n/a	n/a n/a	625	-6% 0%	n/a	n/a n/a	n/a	n/a n/a	833	-17% 0%

Some of the above listed commodities (*) are not traded in standard units (litres or kg), but in **informal units** (“bundles” or “basins”). These informal units are not strictly defined by weight, can vary from vendor to vendor or by time, and are therefore **not directly comparable**. To address this issue, price data needs to be determined via the actual purchase of a given commodity, by its weight and conversion into standard units. The price data of these commodities is collected only in the last week of the month; when price data is not collected, the price table above shows the last price data available.

5. In April and May 2020, this market monitor snapshot reported median commodity prices, rather than average prices. Because surveys were conducted remotely, without weighting items, there was a higher possibility of outlier prices, which would have a greater impact on averages. To align with WFP’s global methodology and past reporting of MEB item prices in the Uganda response, since June 2020, the methodology was changed to report average commodity prices.
6. One United States Dollar (USD) was equivalent to 3,681 UGX as of 21 July 2020, according to Oanda currency converter.
7. Pre-COVID-19 price data for Adjumani settlement corresponds to prices collected in December 2019. For all other settlements, March 2020 data is used. Price data for items listed under “other MEB items” and underwear are only collected once every 6 months and can therefore only be compared against prices from January 2020 (upper).
8. Regional and national price aggregations are only reported, if enough price data exists across various settlements. Price changes are only reported where price data for a given item exists for both this reporting round and the reference periods, i.e. March 2020 and the last reporting round.

Market Monitor – Refugee Hosting Areas

Refugee Settlement Price and Market Functionality Snapshot, 1-14 July 2020

UGANDA

MARKET FUNCTIONALITY

The following results refer to a recall period of one week prior to data collection.

TRADER AND CUSTOMER BEHAVIOR

% of interviewed traders reporting a change in the number of vendors in their marketplace:

		Nationwide	Southwest Region	West Nile Region
INCREASE		24%	24%	23%
DECREASE		7%	2%	9%
NO CHANGE		69%	73%	68%

% of interviewed traders reporting a change in the number of customers in their marketplace:[9]

	Nationwide	Southwest Region	West Nile Region
INCREASE	29%	16%	35%
DECREASE	30%	63%	15%
NO CHANGE	41%	20%	50%

SAFETY

% of interviewed traders reporting changes in perceptions of security relating to operating in their marketplace:

	Nationwide	Southwest Region	West Nile Region
LESS SECURE	8%	4%	10%
MORE SECURE	21%	45%	10%
NO DIFFERENCE	71%	51%	80%

Top reported reasons by traders for feeling more or less secure:[10]

Nationwide	1	Non compliance with official rules and regulations	64%
Nationwide	2	Increased awareness about health risks and appropriate behaviour	29%
Southwest Region	1	Increased awareness about health risks and appropriate behaviour	29%
Southwest Region	2	Increased presence of security personnel	29%
West Nile Region	1	Non compliance with official rules and regulations	75%
West Nile Region	2	Implementation of rules and regulations	30%

STOCK AND SUPPLY

% of interviewed traders reporting difficulty in obtaining enough supply to meet demand:[11]

	Nationwide	Southwest Region	West Nile Region
YES	62%	0%	62%
NO	38%	100%	38%

% of interviewed traders reporting concern that their stocks will run out within one week following data collection:

	Nationwide	Southwest Region	West Nile Region
YES	21%	0%	30%
NO	79%	100%	70%

Nationwide

Top 3 reasons why traders reported difficulty in obtaining enough supply to meet demand:[12]

1	Supplier unable to provide enough	62%
2	Difficulty transporting items to marketplace	38%
3	Not enough money to source items	24%

PAYMENT AND LIQUIDITY

% of interviewed traders accepting mobile money payments when data was collected:

	Nationwide	Southwest Region	West Nile Region
YES	56%	76%	47%
NO	44%	24%	53%

% of interviewed traders reporting mobile money or bank agents closing:

	Nationwide	Southwest Region	West Nile Region
YES	8%	0%	11%
NO	61%	84%	50%
DON'T KNOW	32%	16%	39%

PREPARED BY: World Food Programme, U-LEARN

ON BEHALF OF: Uganda Cash Working Group, Market Analysis Task Force

9. This indicator is driven by traders' report from Kyaka II.
10. This indicator refers to the subset of traders who reported feeling more or less secure respectively.
11. This indicator is driven by traders of Palabek settlement, reporting stock issue mostly with beans and dried fish.
12. Respondents could select multiple response options.

For more information on this factsheet please contact:
Anders Petersson, WFP, anders.petersson@wfp.org
or REACH Uganda, uganda@reach-initiative.org