CONCEPT 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. 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. 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.

MARKET AND TRADER CHARACTERISTICS

Key informants (KIs) reported refugees in Imvepi access markets both within and outside of the settlement, which are also accessed by the local host communities, as well as traders from outside the sub-county. The assessed markets hosted up to 100 traders and were comprised of both temporary and semi-permanent structures. Point J Market reportedly operated every day, while the larger one, Okpotani Market operated on 3 days in the week. Even though Okpotani Market only operated at full capacity 3 days a week, some permanent structures were present, resulting in small-scale trade during the other days of the week.

4 Total number of markets assessed near this settlement (via 185 trader interviews and 2 key informant interviews)

Gender of interviewed traders:

<table>
<thead>
<tr>
<th>Female</th>
<th>Male</th>
</tr>
</thead>
<tbody>
<tr>
<td>48.6%</td>
<td>51.4%</td>
</tr>
</tbody>
</table>

Population group of interviewed traders:

<table>
<thead>
<tr>
<th>Host community</th>
<th>Refugee</th>
</tr>
</thead>
<tbody>
<tr>
<td>63.8%</td>
<td>36.2%</td>
</tr>
</tbody>
</table>

2.7% of traders interviewed reported employing at least one other person.

Top 3 nationalities of interviewed traders:

- Uganda: 63.2%
- South Sudan: 35.7%
- Sudan: 1.1%

Classification of traders interviewed:

- Retailers: 75.1%
- Producers: 75.1%
- Wholesalers: 25.4%

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

- Refugees living in the settlement: 94.1%
- Host community near settlement: 91.4%
- Refugees living in another settlement: 23.2%
SUPPLY, DEMAND, AND PRICES

KIs reported facing changes in supply and demand for several commodities due to seasonality. This concerned food items in particular such as maize flour, beans, and vegetables, where the demand reportedly increased during the dry season, as less consumers were able to produce for themselves. School materials also reportedly experienced a decrease in supply and demand during the school term breaks, when children were not in school and did not need the supplies. Other items reportedly experienced no changes in supply and demand as they were reported to remain a necessity throughout the year, such as salt, vegetable oil, sanitary pads, charcoal, and firewood, amongst others.

### Sources, prices, and restocking data for selected items sold in or near this settlement, as reported by interviewed traders:

<table>
<thead>
<tr>
<th>Commodity</th>
<th>Most common source of item</th>
<th>Item price in markets in or near this settlement (October 2019)</th>
<th>Median # of days that remaining stock is estimated to last</th>
<th>Estimated median amount of time item remains in stock before sale</th>
</tr>
</thead>
<tbody>
<tr>
<td>Maize flour</td>
<td>Retailer in the subcounty</td>
<td>2,755 UGX/Kg</td>
<td>14 days</td>
<td>One to four weeks</td>
</tr>
<tr>
<td>Beans (dried, nambale)</td>
<td>No consensus</td>
<td>3,307 UGX/Kg</td>
<td>37 days</td>
<td>No consensus</td>
</tr>
<tr>
<td>Sorghum grain</td>
<td>Own production</td>
<td>885 UGX/Kg</td>
<td>20 days</td>
<td>Less than one week</td>
</tr>
<tr>
<td>Cassava (whole, fresh)</td>
<td>Own production</td>
<td>622 UGX/kg</td>
<td>1 days</td>
<td>Less than one week</td>
</tr>
<tr>
<td>Leafy vegetables</td>
<td>Farmers within the subcounty</td>
<td>861 UGX/kg</td>
<td>1 day</td>
<td>One to four weeks</td>
</tr>
<tr>
<td>Laundry soap</td>
<td>No consensus</td>
<td>3,500 UGX/Kg</td>
<td>14 days</td>
<td>Less than one week</td>
</tr>
<tr>
<td>Sanitary pad (disposable)</td>
<td>Retailer outside the subcounty</td>
<td>3,000 UGX/packet</td>
<td>29 days</td>
<td>More than one month</td>
</tr>
<tr>
<td>Exercise books</td>
<td>Retailer outside the subcounty</td>
<td>400 UGX/piece</td>
<td>14 days</td>
<td>One to four weeks</td>
</tr>
<tr>
<td>Jerry can (plastic, 20 L)</td>
<td>Retailer outside the subcounty</td>
<td>7,000 UGX/piece</td>
<td>6.5 days</td>
<td>One to four weeks</td>
</tr>
<tr>
<td>Blanket (cotton)</td>
<td>No data</td>
<td></td>
<td>No data</td>
<td>No data</td>
</tr>
<tr>
<td>Mud bricks (unfired)</td>
<td>No data</td>
<td></td>
<td>No data</td>
<td>No data</td>
</tr>
<tr>
<td>Grass thatch</td>
<td>Retailer in the subcounty</td>
<td>395 UGX/Kg</td>
<td>3 days</td>
<td>Less than one week</td>
</tr>
<tr>
<td>Charcoal</td>
<td>Retailer in the subcounty</td>
<td>150 UGX/Kg</td>
<td>3 days</td>
<td>Less than one week</td>
</tr>
<tr>
<td>Firewood</td>
<td>Retailer in the subcounty</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

#### Seasonal fluctuations in supply for selected items sold in or near settlements in Northwest, Uganda, as reported by key informants (KIs):

**Maize flour**
- Jan: Available
- Feb: Available
- Mar: Available
- Apr: Available
- May: Available
- Jun: Available
- Jul: Available
- Aug: Available
- Sept: Available
- Oct: Available
- Nov: Available
- Dec: Available

**Beans (dried, nambale)**
- Jan: Available
- Feb: Available
- Mar: Available
- Apr: Available
- May: Available
- Jun: Available
- Jul: Available
- Aug: Available
- Sept: Available
- Oct: Available
- Nov: Available
- Dec: Available

**Sorghum grain**
- Jan: Available
- Feb: Available
- Mar: Available
- Apr: Available
- May: Available
- Jun: Available
- Jul: Available
- Aug: Available
- Sept: Available
- Oct: Available
- Nov: Available
- Dec: Available

**Cassava (whole, fresh)**
- Jan: Available
- Feb: Available
- Mar: Available
- Apr: Available
- May: Available
- Jun: Available
- Jul: Available
- Aug: Available
- Sept: Available
- Oct: Available
- Nov: Available
- Dec: Available

**Leafy vegetables**
- Jan: Available
- Feb: Available
- Mar: Available
- Apr: Available
- May: Available
- Jun: Available
- Jul: Available
- Aug: Available
- Sept: Available
- Oct: Available
- Nov: Available
- Dec: Available

**Vegetable oil**
- Jan: Available
- Feb: Available
- Mar: Available
- Apr: Available
- May: Available
- Jun: Available
- Jul: Available
- Aug: Available
- Sept: Available
- Oct: Available
- Nov: Available
- Dec: Available

**Cooking salt**
- Jan: Available
- Feb: Available
- Mar: Available
- Apr: Available
- May: Available
- Jun: Available
- Jul: Available
- Aug: Available
- Sept: Available
- Oct: Available
- Nov: Available
- Dec: Available

**Tilapia (smoked)**
- Jan: Available
- Feb: Available
- Mar: Available
- Apr: Available
- May: Available
- Jun: Available
- Jul: Available
- Aug: Available
- Sept: Available
- Oct: Available
- Nov: Available
- Dec: Available

**Milk (fresh)**
- Jan: Available
- Feb: Available
- Mar: Available
- Apr: Available
- May: Available
- Jun: Available
- Jul: Available
- Aug: Available
- Sept: Available
- Oct: Available
- Nov: Available
- Dec: Available

**Laundry soap**
- Jan: Available
- Feb: Available
- Mar: Available
- Apr: Available
- May: Available
- Jun: Available
- Jul: Available
- Aug: Available
- Sept: Available
- Oct: Available
- Nov: Available
- Dec: Available

**Sanitary pad (disposable)**
- Jan: Available
- Feb: Available
- Mar: Available
- Apr: Available
- May: Available
- Jun: Available
- Jul: Available
- Aug: Available
- Sept: Available
- Oct: Available
- Nov: Available
- Dec: Available

**Dry cells**
- Jan: Available
- Feb: Available
- Mar: Available
- Apr: Available
- May: Available
- Jun: Available
- Jul: Available
- Aug: Available
- Sept: Available
- Oct: Available
- Nov: Available
- Dec: Available

**Torch**
- Jan: Available
- Feb: Available
- Mar: Available
- Apr: Available
- May: Available
- Jun: Available
- Jul: Available
- Aug: Available
- Sept: Available
- Oct: Available
- Nov: Available
- Dec: Available

**Exercise books**
- Jan: Available
- Feb: Available
- Mar: Available
- Apr: Available
- May: Available
- Jun: Available
- Jul: Available
- Aug: Available
- Sept: Available
- Oct: Available
- Nov: Available
- Dec: Available

**Jerry can (plastic, 20 L)**
- Jan: Available
- Feb: Available
- Mar: Available
- Apr: Available
- May: Available
- Jun: Available
- Jul: Available
- Aug: Available
- Sept: Available
- Oct: Available
- Nov: Available
- Dec: Available

**Plastic basin**
- Jan: Available
- Feb: Available
- Mar: Available
- Apr: Available
- May: Available
- Jun: Available
- Jul: Available
- Aug: Available
- Sept: Available
- Oct: Available
- Nov: Available
- Dec: Available

**Blanket (cotton)**
- Jan: Available
- Feb: Available
- Mar: Available
- Apr: Available
- May: Available
- Jun: Available
- Jul: Available
- Aug: Available
- Sept: Available
- Oct: Available
- Nov: Available
- Dec: Available

**Mingle (wooden stirrer)**
- Jan: Available
- Feb: Available
- Mar: Available
- Apr: Available
- May: Available
- Jun: Available
- Jul: Available
- Aug: Available
- Sept: Available
- Oct: Available
- Nov: Available
- Dec: Available

**Panga (knife)**
- Jan: Available
- Feb: Available
- Mar: Available
- Apr: Available
- May: Available
- Jun: Available
- Jul: Available
- Aug: Available
- Sept: Available
- Oct: Available
- Nov: Available
- Dec: Available

**Hoe**
- Jan: Available
- Feb: Available
- Mar: Available
- Apr: Available
- May: Available
- Jun: Available
- Jul: Available
- Aug: Available
- Sept: Available
- Oct: Available
- Nov: Available
- Dec: Available

**Steel roofing nails**
- Jan: Available
- Feb: Available
- Mar: Available
- Apr: Available
- May: Available
- Jun: Available
- Jul: Available
- Aug: Available
- Sept: Available
- Oct: Available
- Nov: Available
- Dec: Available

**Nylon rope**
- Jan: Available
- Feb: Available
- Mar: Available
- Apr: Available
- May: Available
- Jun: Available
- Jul: Available
- Aug: Available
- Sept: Available
- Oct: Available
- Nov: Available
- Dec: Available

**Eucalyptus poles**
- Jan: Available
- Feb: Available
- Mar: Available
- Apr: Available
- May: Available
- Jun: Available
- Jul: Available
- Aug: Available
- Sept: Available
- Oct: Available
- Nov: Available
- Dec: Available

**Mud bricks (fired)**
- Jan: Available
- Feb: Available
- Mar: Available
- Apr: Available
- May: Available
- Jun: Available
- Jul: Available
- Aug: Available
- Sept: Available
- Oct: Available
- Nov: Available
- Dec: Available

**Mud bricks (unfired)**
- Jan: Available
- Feb: Available
- Mar: Available
- Apr: Available
- May: Available
- Jun: Available
- Jul: Available
- Aug: Available
- Sept: Available
- Oct: Available
- Nov: Available
- Dec: Available

**Grass thatch**
- Jan: Available
- Feb: Available
- Mar: Available
- Apr: Available
- May: Available
- Jun: Available
- Jul: Available
- Aug: Available
- Sept: Available
- Oct: Available
- Nov: Available
- Dec: Available

**Charcoal**
- Jan: Available
- Feb: Available
- Mar: Available
- Apr: Available
- May: Available
- Jun: Available
- Jul: Available
- Aug: Available
- Sept: Available
- Oct: Available
- Nov: Available
- Dec: Available

**Firewood**
- Jan: Available
- Feb: Available
- Mar: Available
- Apr: Available
- May: Available
- Jun: Available
- Jul: Available
- Aug: Available
- Sept: Available
- Oct: Available
- Nov: Available
- Dec: Available

**Legend:**
- Supply
- High season (increased)
- Low season (decreased)
- Baseline levels / No high or low season
KIs reported varying concerns related to safety and security in markets. In one area, the KI reported the security of the markets to be good, particularly due to fencing. However, another KI noted that the lack of fencing and fear of theft led some traders to sleep at the market in order to protect their commodities.

17.4% of households (HHs) reported facing barriers when trying to access marketplaces.

Of this 17.4%, top 3 most commonly reported barriers:
- Long distance to the market: 87.7%
- Disability: 6.8%
- Physical attacks by host community: 5.5%

% of households that reported mainly accessing marketplaces using the following modes of transport:
- Walking: 98.1%
- Boda boda (motorcycle taxi): 1.7%
- Bicycle: 0.2%

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

10.8% of interviewed traders reported having faced a security incident related to operating their business.

Of this 10.8%, top 3 most commonly reported types of incidents:
- Theft: 45%
- Verbal harassment by host community: 30%
- Verbal harassment by refugees: 20%

Top 3 most common triggers for security incidents reported by interviewed traders:
- Social discrimination: 40%
- Money/business disputes: 35%
- Tension between the host community: 10%

In assessed markets, KIs highlighted that traders set their own prices. Like the demand and supply, prices for some of the items sold were also affected by seasonality. Upon the start of school terms, prices for school materials were found to increase due to the increased demand. The same was applicable for commodities such as mud bricks, hoes, and maize flour where the prices reportedly increased once harvests were exhausted. Other commodities were reported to have stable prices throughout the year.

24.9% of interviewed traders reported having a license to operate in their market.

88.6% of interviewed traders reported paying market dues.

% of interviewed traders reporting using the following types of storage:
- Own storage: 48.1%
- Rented storage: 7.5%
- Other: 5.9%
- No storage: 38.4%

5.9% 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: 37,500 UGX

% of interviewed traders reporting that they currently use each of the following sources of capital:
- Own savings: 96.8%
- Credit or loans: 4.9%
- Other: 3.2%
- Support from NGOs: 2.2%

Estimated median monthly expenditures reported by interviewed traders in the following categories:
- Market dues (past month): 12,000 UGX
- Rental of storage space: 6,000 UGX
- Round-trip transport to restock retailed items: 10,000 UGX
- Transaction cost to obtain new stock (loading, unloading, storage, tax, etc.): 10,000 UGX
**ABILITY TO SCALE UP**

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

<table>
<thead>
<tr>
<th>Category of commodities</th>
<th>Would you be able to stock enough of your current items to meet the demand?</th>
<th>If yes, how long would it take you to obtain additional stock to meet the demand?</th>
<th>Would you be able to obtain this amount using only your current supplier?</th>
<th>If unable to stock enough, what would make it most difficult for you to increase your supply?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fresh food</td>
<td>Yes (97.1%)</td>
<td>One week (88.2%)</td>
<td>Yes (55.9%)</td>
<td>No consensus (50%)</td>
</tr>
<tr>
<td>Non-fresh food</td>
<td>Yes (63.8%)</td>
<td>One week (67.6%)</td>
<td>Yes (59.5%)</td>
<td>Low profit margin</td>
</tr>
<tr>
<td>Sanitary items</td>
<td>No (42.9%)</td>
<td>Two weeks (50%)</td>
<td>Yes (91.7%)</td>
<td>Too much humanitarian aid</td>
</tr>
<tr>
<td>Household items</td>
<td>Yes (57.7%)</td>
<td>Two weeks (86.7%)</td>
<td>Yes (83.3%)</td>
<td>Lack of quality supply</td>
</tr>
<tr>
<td>Shelter and livelihoods items</td>
<td>Yes (75%)</td>
<td>Month (44.4%)</td>
<td>Yes (83.3%)</td>
<td>Lack of capital</td>
</tr>
<tr>
<td>Lighting items</td>
<td>Yes (73.3%)</td>
<td>One week (59.1%)</td>
<td>Yes (59.1%)</td>
<td>Too much humanitarian aid</td>
</tr>
<tr>
<td>Educational items</td>
<td>No (45.2%)</td>
<td>Two weeks (50%)</td>
<td>Yes (85.7%)</td>
<td>Consensus</td>
</tr>
<tr>
<td>Cooking fuel</td>
<td>Yes (75.9%)</td>
<td>Two weeks (50%)</td>
<td>No consensus (50%)</td>
<td></td>
</tr>
</tbody>
</table>

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**Endnotes**


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 is 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.


6. The Ugandan shilling to United States dollar exchange rate was 3,668.05 on 24 December 2019. [https://www.xe.com/](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, Kireongoro) and Southwest (Kyaka II, Nakivale, Oruchinga, Rwanmanja, 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.