Market Monitor – Refugee Hosting Areas

Refugee Settlement Price and Market Functionality Snapshot, 1-31 August 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 1,425,040 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 1-31 August 2020. 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 levels, unless stated otherwise. In total, 336 traders were interviewed nationwide in this round, of these 94 in the Southwest Region (SWR) and 242 in the West Nile Region (WNR).

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.
A full data set with commodity prices can be provided upon request.

KEY FINDINGS

Average cost of the full MEB in August 2020:
457,656 UGX

Average cost of the food MEB in August 2020:
293,821 UGX

▼ -9% compared to the full MEB in March 2020.
▼ -12% compared to the food MEB in March 2020.

MARKET FUNCTIONALITY

- At the national level half of the traders (50%) reported that the number of vendors has not changed compared to the week before the COVID-19 outbreak (18th of March). Further, this indicator showed no significant difference between the regions.
- At the national level, the reported average number of customers received per day by interviewed vendors during the last week was 21, representing a 11% increase from July. However, the regional breakdown shows that traders from SWR reported a higher number of customers (34 representing a 36% increase) than those of WNR (18 representing no change from July).
- More than half (57%) of vendors were reported to accept mobile money. This proportion was slightly higher in SWR (67%) as compared to WNR (52%).
- Thirty percent of interviewed traders reported difficulties in meeting demand. However, in the SWR only 12% of the traders reported difficulties, while in the WNR the proportion is higher (35%).
- Nationwide 24% of traders reported being concerned about their stocks running out. In SWR this proportion rose from 4% to 17% and decreased slightly in WNR from 31% in the second half of July to 26% in August.
- The proportion of traders reporting feeling less secure in relation to operating in the market increased from 3% to 11% nationwide this reporting round. This figure is mainly driven by an increase in this proportion from 3% to 22% in SWR.

KEY CHALLENGES

Top 3 challenges reported by traders:
1. Increased price of transportation 20%
2. Limited supply of some commodities 19%
3. Price fluctuation of commodities 19%

2. For analysis purposes, the 13 refugee settlement locations have been aggregated to two regions: West Nile (Palorinya, Pababek, Bidi Bidi, Imvepi, Rhino Camp, Lolebu, Adjumani, Kiyandongo settlements) and Southwest (Kyangwali, Rwamwanja, Kyaka, Oruchinga, Nakivale).
3. The March full MEB cost constitutes the reference MEB cost 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.
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Uganda Minimum Expenditure Basket (MEB)

Food Items (monthly)
- Maize flour: 44 kg
- Beans: 27 kg
- Sorghum grain: 8 kg
- Oil: 4 L
- Milk: 2 L

Non-Food Items (monthly)
- Laundry soap: 2.25 kg
- Firewood: 165 kg

Other Components (monthly)
- Water*: 3,750 UGX
- Education**: 22,667 UGX
- Health*: 2,669 UGX
- Lighting*: 5,000 UGX

Other Items (once per year)
- Reusable sanitary pads: 8 pc
- Jerry can (20 L): 2 pc
- Jerry can (5 L): 1 pc
- Bucket with lid: 1 pc
- Blanket: 5 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.

Settlements with the least expensive average full MEB costs:
1. Bidibidi
2. Oruchinga
3. Palorinya

Settlements with the most expensive average full MEB costs:
1. Rhino Camp
2. Kiryandongo
3. Lobule

Full MEB cost percentage change since March (left) and July (right):
- Adjumani: -27% -2%
- Bidibidi: -25% -10%
- Imvepi: -8% +16%
- Kiryandongo: -7% -2%
- Lobule: -3% -3%
- Kyaka II: +1% -15%
- Kyangwali: -7% +2%
- Nakivale: +2% -9%
- Oruchinga: +25% -8%
- Palabek: -11% -6%
- Palorinya: -22% +12%
- Rhino Camp: -3% +23%
- Rwamwanja: -17% -10%

5. The percentage change since July is calculated considering the whole month of July (aggregation of round 6 and round 7).
6. The large percentage change in the MEB cost compared to July increase for this location was mainly driven by the increase in the price and changes in the conversion rates of leafy greens, cassava and charcoal.
### COMMODITY PRICES

#### Table 1: Average commodity prices in Uganda Shillings (UGX)\(^7\), by refugee settlement location, and percentage price change since March (upper)\(^8\) and last round (July 2020, lower), respectively.\(^9\)

<table>
<thead>
<tr>
<th>Item (unit)</th>
<th>Nationwide</th>
<th>Southwest Region</th>
<th>Adjumani</th>
<th>Kiyangalagi</th>
<th>Lobaale</th>
<th>Kakabi</th>
<th>Oruchinga</th>
<th>Palabek</th>
<th>Palinya</th>
<th>Rhino Camp</th>
<th>Rwamjanga</th>
</tr>
</thead>
<tbody>
<tr>
<td>Maize flour (1 kg)</td>
<td>2063</td>
<td>-15%</td>
<td>1945</td>
<td>-8%</td>
<td>2161</td>
<td>20%</td>
<td>1963</td>
<td>-17%</td>
<td>1650</td>
<td>-18%</td>
<td>3449</td>
</tr>
<tr>
<td>Fish (mixed, 1 kg)</td>
<td>3404</td>
<td>+4%</td>
<td>2819</td>
<td>+6%</td>
<td>3667</td>
<td>+16%</td>
<td>4547</td>
<td>+11%</td>
<td>2860</td>
<td>-11%</td>
<td>3627</td>
</tr>
<tr>
<td>Sorghum grain (1 kg)</td>
<td>1239</td>
<td>-10%</td>
<td>1498</td>
<td>-6%</td>
<td>1116</td>
<td>-8%</td>
<td>1100</td>
<td>-27%</td>
<td>1167</td>
<td>+26%</td>
<td>1100</td>
</tr>
<tr>
<td>Cooking oil (1 litre)</td>
<td>5836</td>
<td>+7%</td>
<td>5896</td>
<td>+2%</td>
<td>5769</td>
<td>+4%</td>
<td>6000</td>
<td>0%</td>
<td>5192</td>
<td>-2%</td>
<td>4722</td>
</tr>
<tr>
<td>Fresh cassava* (1 kg)</td>
<td>719</td>
<td>+30%</td>
<td>400</td>
<td>-2%</td>
<td>730</td>
<td>-9%</td>
<td>561</td>
<td>0%</td>
<td>459</td>
<td>+11%</td>
<td>1457</td>
</tr>
<tr>
<td>Cooking salt (500 g)</td>
<td>981</td>
<td>-8%</td>
<td>941</td>
<td>-5%</td>
<td>1000</td>
<td>-6%</td>
<td>1000</td>
<td>0%</td>
<td>1000</td>
<td>-5%</td>
<td>944</td>
</tr>
<tr>
<td>Leafy greens* (1 kg)</td>
<td>2025</td>
<td>+27%</td>
<td>2167</td>
<td>+6%</td>
<td>2016</td>
<td>+22%</td>
<td>1373</td>
<td>2%</td>
<td>2519</td>
<td>-12%</td>
<td>2971</td>
</tr>
<tr>
<td>Milk (1 litre)</td>
<td>1632</td>
<td>+15%</td>
<td>1364</td>
<td>+9%</td>
<td>1789</td>
<td>+23%</td>
<td>2000</td>
<td>0%</td>
<td>1333</td>
<td>+33%</td>
<td>1490</td>
</tr>
<tr>
<td>Firewood (1 kg)</td>
<td>247</td>
<td>-9%</td>
<td>333</td>
<td>+3%</td>
<td>243</td>
<td>-7%</td>
<td>231</td>
<td>-22%</td>
<td>205</td>
<td>-16%</td>
<td>189</td>
</tr>
<tr>
<td>Laundry soap (1 kg)</td>
<td>3276</td>
<td>+2%</td>
<td>3418</td>
<td>-4%</td>
<td>2192</td>
<td>+35%</td>
<td>3000</td>
<td>-14%</td>
<td>3125</td>
<td>+56%</td>
<td>3300</td>
</tr>
<tr>
<td>Underwear (1 piece)</td>
<td>2813</td>
<td>-4%</td>
<td>2722</td>
<td>-6%</td>
<td>2835</td>
<td>-13%</td>
<td>2545</td>
<td>-11%</td>
<td>1475</td>
<td>-4%</td>
<td>2800</td>
</tr>
<tr>
<td>Big jerry can (20L, 1 piece)</td>
<td>6439</td>
<td>+5%</td>
<td>5789</td>
<td>-8%</td>
<td>6805</td>
<td>+11%</td>
<td>6227</td>
<td>+4%</td>
<td>7500</td>
<td>+50%</td>
<td>7000</td>
</tr>
<tr>
<td>Dry cells (1 packet)</td>
<td>n/a</td>
<td>0%</td>
<td>n/a</td>
<td>0%</td>
<td>n/a</td>
<td>0%</td>
<td>n/a</td>
<td>0%</td>
<td>n/a</td>
<td>0%</td>
<td>n/a</td>
</tr>
<tr>
<td>Disposable torch (1 packet)</td>
<td>940</td>
<td>-11%</td>
<td>950</td>
<td>-10%</td>
<td>932</td>
<td>-7%</td>
<td>864</td>
<td>-14%</td>
<td>1000</td>
<td>0%</td>
<td>1000</td>
</tr>
<tr>
<td>Millet flour (1 kg)</td>
<td>3379</td>
<td>-2%</td>
<td>3369</td>
<td>+3%</td>
<td>3388</td>
<td>-13%</td>
<td>3301</td>
<td>+21%</td>
<td>3833</td>
<td>-1%</td>
<td>3000</td>
</tr>
<tr>
<td>Maize grain (1 kg)</td>
<td>996</td>
<td>-4%</td>
<td>728</td>
<td>-4%</td>
<td>1135</td>
<td>-7%</td>
<td>1245</td>
<td>-11%</td>
<td>920</td>
<td>-1%</td>
<td>1033</td>
</tr>
<tr>
<td>Charcoal* (1 kg)</td>
<td>1063</td>
<td>+30%</td>
<td>1063</td>
<td>+2%</td>
<td>1063</td>
<td>-8%</td>
<td>824</td>
<td>+6%</td>
<td>668</td>
<td>-33%</td>
<td>2000</td>
</tr>
</tbody>
</table>

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, may 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 data above shows the last price data available.

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\(^7\) In April and May 2020, this market monitor snapshot reported median commodity prices, rather than average prices. Because surveys were conducted remotely, without weighing 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.

\(^8\) The United States Dollar (USD) was equivalent to USD 1,058.52 to USD 1,085.51 (April 2020). April 2020.

\(^9\) The FY2019 price data for Adjumani settlement corresponds to prices collected in December 2018. For all other refugee settlements, March 2020 data was used. Price data for items listed under "other MEB items" and underwear are only collected once every 6 months and cannot therefore be compared against prices from January 2020 (upper). Regional and national price aggregations are only reported if enough price data exists across various settlements. Price changes are only reported when price data for a given item exists for both the reporting round and the reference period, i.e. March 2020 and the last reporting round.

### Settlements

<table>
<thead>
<tr>
<th>Region</th>
<th>Oruchinga</th>
<th>Palabek</th>
<th>Palinya</th>
<th>Rhino Camp</th>
<th>Rwamjanga</th>
</tr>
</thead>
<tbody>
<tr>
<td>Grown</td>
<td>1725</td>
<td>-11%</td>
<td>2718</td>
<td>-20%</td>
<td>1092</td>
</tr>
<tr>
<td>Grown</td>
<td>2260</td>
<td>-6%</td>
<td>3677</td>
<td>+19%</td>
<td>3292</td>
</tr>
<tr>
<td>Grown</td>
<td>2280</td>
<td>+3%</td>
<td>3682</td>
<td>+9%</td>
<td>3600</td>
</tr>
<tr>
<td>Grown</td>
<td>2530</td>
<td>+2%</td>
<td>5100</td>
<td>+5%</td>
<td>5000</td>
</tr>
<tr>
<td>Grown</td>
<td>2540</td>
<td>-1%</td>
<td>5150</td>
<td>+1%</td>
<td>5000</td>
</tr>
<tr>
<td>Grown</td>
<td>2550</td>
<td>-2%</td>
<td>5160</td>
<td>+0%</td>
<td>5000</td>
</tr>
<tr>
<td>Grown</td>
<td>2560</td>
<td>-3%</td>
<td>5170</td>
<td>+1%</td>
<td>5000</td>
</tr>
</tbody>
</table>
# Market Monitor – Refugee Hosting Areas

Refugee Settlement Price and Market Functionality Snapshot, 1-31 August 2020

## Market Functionality

Unless specified otherwise, the following results refer to a recall period of one week prior to data collection.

### Trader and Customer Behavior

<table>
<thead>
<tr>
<th>Nationality</th>
<th>Increase</th>
<th>Decrease</th>
<th>No Change</th>
<th>July</th>
<th>August</th>
</tr>
</thead>
<tbody>
<tr>
<td>Nationwide</td>
<td>7%</td>
<td>43%</td>
<td>50%</td>
<td>19</td>
<td>21</td>
</tr>
<tr>
<td>Southwest Region</td>
<td>9%</td>
<td>37%</td>
<td>53%</td>
<td>25</td>
<td>34</td>
</tr>
<tr>
<td>West Nile Region</td>
<td>6%</td>
<td>44%</td>
<td>49%</td>
<td>18</td>
<td>18</td>
</tr>
</tbody>
</table>

### Stock and Supply

<table>
<thead>
<tr>
<th>Nationality</th>
<th>Yes</th>
<th>No</th>
</tr>
</thead>
<tbody>
<tr>
<td>Nationwide</td>
<td>30%</td>
<td>70%</td>
</tr>
<tr>
<td>Southwest Region</td>
<td>12%</td>
<td>88%</td>
</tr>
<tr>
<td>West Nile Region</td>
<td>35%</td>
<td>65%</td>
</tr>
</tbody>
</table>

### Safety

<table>
<thead>
<tr>
<th>Nationality</th>
<th>Less Secure</th>
<th>More Secure</th>
<th>No Difference</th>
<th>July</th>
<th>August</th>
</tr>
</thead>
<tbody>
<tr>
<td>Nationwide</td>
<td>11%</td>
<td>9%</td>
<td>80%</td>
<td>17%</td>
<td>16%</td>
</tr>
<tr>
<td>Southwest Region</td>
<td>22%</td>
<td>16%</td>
<td>62%</td>
<td>31%</td>
<td>35%</td>
</tr>
<tr>
<td>West Nile Region</td>
<td>6%</td>
<td>6%</td>
<td>88%</td>
<td>18%</td>
<td>24%</td>
</tr>
</tbody>
</table>

### Payment and Liquidity

<table>
<thead>
<tr>
<th>Nationality</th>
<th>Yes</th>
<th>No</th>
</tr>
</thead>
<tbody>
<tr>
<td>Nationwide</td>
<td>57%</td>
<td>43%</td>
</tr>
<tr>
<td>Southwest Region</td>
<td>67%</td>
<td>33%</td>
</tr>
<tr>
<td>West Nile Region</td>
<td>52%</td>
<td>48%</td>
</tr>
</tbody>
</table>

### TRAVER AND CUSTOMER BEHAVIOR

**% of interviewed traders reporting a change in the number of vendors in their marketplace vs pre-COVID-19 week:**

- **Nationwide**:
  - Increase: 7%
  - Decrease: 43%
  - No Change: 50%
  - July: 19
  - August: 21

- **Southwest Region**:
  - Increase: 9%
  - Decrease: 37%
  - No Change: 53%
  - July: 25
  - August: 34

- **West Nile Region**:
  - Increase: 6%
  - Decrease: 44%
  - No Change: 49%
  - July: 18
  - August: 18

**Average numbers of customers per day reported by interviewed traders:**

- **Nationwide**:
  - July: 19
  - August: 21

**Top reported reasons by traders for feeling more or less secure:**

1. Non compliance with official rules and regulations: 41%
2. Implementation of rules and regulations: 24%

**STOCK AND SUPPLY**

**% of interviewed traders reporting difficulty in obtaining enough supply to meet demand:**

- **Nationwide**:
  - Yes: 30%
  - No: 70%

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

- **Nationwide**:
  - Yes: 24%
  - No: 76%

**PAYMENT AND LIQUIDITY**

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

- **Nationwide**:
  - Yes: 57%
  - No: 43%

**Top 3 reasons why traders reported difficulty in obtaining enough supply to meet demand:**

1. Supplier unable to provide enough: 59%
2. Can no longer obtain items due to restrictions: 24%
3. Producers not producing enough: 16%

For more information on this factsheet please contact:
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