

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 1,423,740¹ refugees as of 30 April 2020, with nearly 94% 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 June 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 regional² levels, unless stated otherwise. In total, 150 traders were interviewed nationwide in this round, of these 45 in the Southwest Region and 105 in the West Nile Region.

KEY FINDINGS

Average cost of the **full MEB** in June 2020:
494'139 UGX

Average cost of the **food MEB** in June 2020:
303'141 UGX

MARKET FUNCTIONALITY

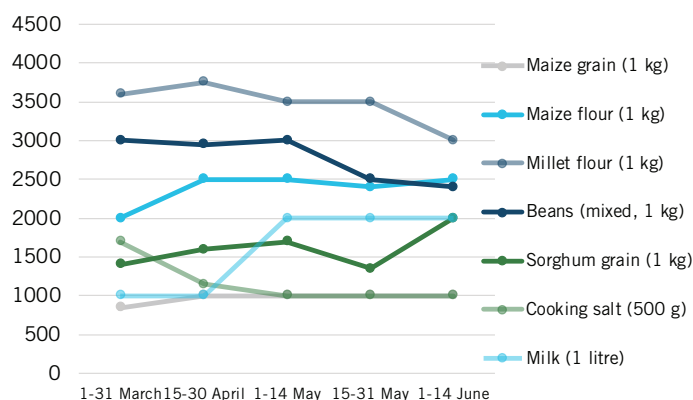
- For the first time since lockdown measures were implemented in March 2020, there seems to be no further decrease in **cross-border trade**.
- Since last round, there has not been a further notable drop in the **numbers of vendors present** on assessed marketplaces. A recovery in the numbers of vendors seems to take hold in the South West Region (SWR, 22% reporting an increase).
- Nearly one third of interviewed traders reporting a further **drop in the number of consumers**. Only in the SWR an equal share of traders (27%) reported a parallel increase in the number of consumers.
- In the West Nile Region (WNR), still around one fifth of all interviewed traders face **difficulties in meeting demand**. This compares to only 8% in the SWR - improving starkly since last round (71%).
- More than twice as many interviewed traders (proportionally) fear their **stocks running out in the WNR** (16%) than in the SWR (7%). These proportions have dropped substantially since April (49% and 69% respectively).

KEY CHALLENGES

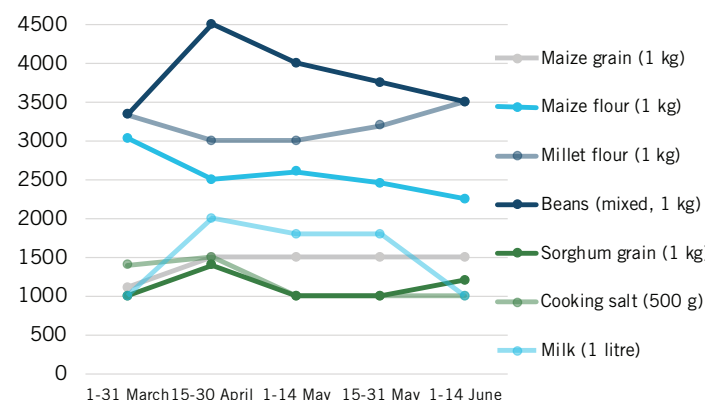
Top 3 challenges reported by traders³:

| | | |
|---|-----------------------------------|-----|
| 1 | Price fluctuation of commodities | 18% |
| 2 | Lack of customers | 16% |
| 3 | Increased price of transportation | 15% |

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



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. These challenges are presented at the national level, as there were minimal regional variations.

Market Monitor – Refugee Hosting Areas

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

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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 |

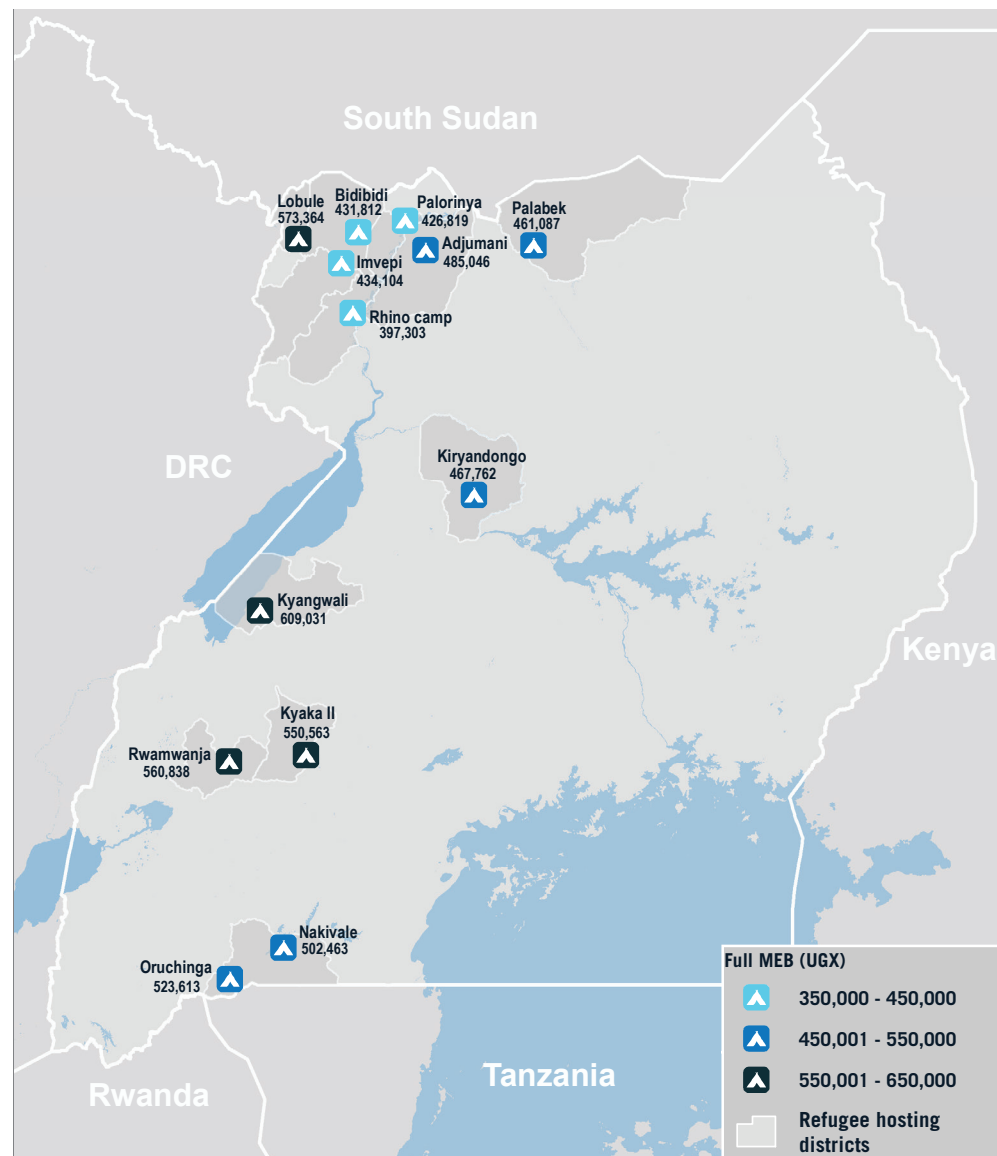
The MEB represents the minimum culturally adjusted group of items required to support a five-person refugee household in Uganda for one month. It is used as an operational tool to identify and quantify the average minimum cost of the regular or seasonal basic needs of a median household that can be covered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

Map 1: Average cost of full MEB by settlement



Settlements with the least expensive average full MEB costs:

1. Rhino camp
2. Palorinya
3. Bidibidi

Settlements with the most expensive average full MEB costs:

1. Kyangwali
2. Lobule
3. Rwamwanja

ABOUT THE MARKET ANALYSIS TASK FORCE

The recently established Market Analysis Task Force is directly reporting to the Uganda Cash Working Group. Its core objective is to foster coordination around relevant market analysis, to harmonize approaches, and to inform the feasibility of cash-based programming from the key perspective of market functionality.

FURTHER RESOURCES:

To see the past products as part of this series, [click here](#).

Market Monitor – Refugee Hosting Areas

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

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COMMODITY PRICES

Table 1: Average commodity prices in Uganda Shillings (UGX)⁴, by refugee settlement location, and percentage price change since March (upper)⁵ and last round (15-31 May 2020, lower), respectively.

| Item (unit) | Regions | | | | | | | | | | Settlements | | | | | | | | | | | | | | | | | | | | | |
|-----------------------|------------|------------------|------|------------------|------|----------|----------|--------|-------------|----------|-------------|--------|----------|-----------|---------|-----------|------------|-----------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|
| | Nationwide | Southwest Region | | West Nile Region | | Adjumani | Bidibidi | Imvepi | Kiryandongo | Kyaka II | Kyangwali | Lobule | Nakivale | Oruchinga | Palabek | Palorinya | Rhino Camp | Rwamwanja | | | | | | | | | | | | | | |
| Maize grain (1 kg) | 1207 | +17% | 998 | +15% | 1353 | +19% | 1465 | -2% | 1025 | +2% | 1250 | +25% | -6% | 1078 | +13% | 867 | +33% | 1500 | +22% | 0% | 800 | -2% | 950 | +19% | 233 | +23% | 1500 | +17% | 1457 | +5% | 945 | +2% |
| | | +1% | | -1% | | +1% | | -2% | | -1% | | -17% | -12% | | +1% | | +2% | | 0% | | -16% | | -5% | | +3% | | +10% | | -4% | | -4% | |
| Maize flour (1 kg) | 2352 | -4% | 2345 | +11% | 2358 | -13% | 2253 | +19% | 1900 | -41% | 1800 | +20% | +3% | 2389 | +3% | 2500 | +8% | 3167 | -11% | -12% | 1700 | -12% | 1800 | -7% | 2692 | -28% | 2000 | +36% | 2329 | -7% | 2455 | +23% |
| | | -1% | | -2% | | +1% | | -7% | | -12% | | -10% | -13% | | +2% | | -3% | | -35% | | -12% | | -6% | | +2% | | +2% | | +6% | | -2% | |
| Millet flour (1 kg) | 3331 | -11% | 3189 | -9% | 3523 | -10% | 3929 | +21% | 3425 | -18% | 3380 | -3% | -3% | 2973 | -1% | 3333 | -9% | 3500 | -2% | -2% | 3000 | -17% | 4000 | 0% | 3000 | -14% | 4000 | -14% | 3250 | -35% | 3250 | +44% |
| | | -1% | | -7% | | +8% | | -2% | | +3% | | +5% | -11% | | +1% | | -5% | | 0% | | -7% | | 0% | | 0% | | +67% | | -3% | | -4% | |
| Beans (mixed, 1 kg) | 3281 | +2% | 2382 | -27% | 3870 | +22% | 4309 | +18% | 3088 | -4% | 4200 | +5% | -4% | 2262 | -33% | 2183 | -26% | 4833 | +22% | -3% | 2000 | -37% | 2500 | -10% | 3500 | +40% | 3500 | +77% | 3600 | 0% | 2273 | -30% |
| | | -3% | | -11% | | -1% | | -16% | | 0% | | -7% | 0% | | -2% | | -30% | | -3% | | -12% | | +4% | | 0% | | -17% | | -15% | | -6% | |
| Sorghum grain (1 kg) | 1302 | +11% | 1713 | -22% | 1151 | +12% | 1257 | -16% | 1000 | +8% | 1700 | +79% | +44% | 2000 | 0% | 1967 | +51% | 1267 | -5% | -5% | 900 | -41% | 1400 | -6% | 600 | -40% | 1500 | +60% | 1567 | +49% | n/a | n/a |
| | | -4% | | -15% | | +9% | | -12% | | -3% | | -6% | -41% | | 0% | | -2% | | n/a | | -32% | | -5% | | -41% | | +12% | | -33% | | n/a | |
| Cooking oil (1 litre) | 5812 | +2% | 6015 | +2% | 5666 | +2% | 6000 | 0% | 5188 | -2% | 5000 | -37% | -3% | 6071 | +8% | 6083 | +1% | 6000 | +12% | 0% | 6000 | +7% | 6000 | 0% | 6000 | +20% | 5800 | +12% | 5743 | -8% | 5857 | +4% |
| | | -1% | | -1% | | -1% | | 0% | | -1% | | -12% | -8% | | -1% | | -1% | | 0% | | +1% | | 0% | | 0% | | 0% | -1% | | 0% | +1% | |
| Fresh cassava* (1 kg) | 462 | n/a | 387 | n/a | 543 | n/a | 715 | n/a | 497 | n/a | n/a | n/a | 120 | n/a | 298 | n/a | 417 | n/a | 725 | n/a | 714 | n/a | 714 | n/a | 294 | n/a | n/a | n/a | n/a | n/a | 714 | n/a |
| Cooking salt (500 g) | 1058 | -55% | 1021 | -51% | 1086 | -57% | 1000 | +30% | 1340 | -45% | 1000 | -23% | -3% | 994 | -64% | 1167 | -35% | 1000 | -35% | 0% | 1000 | -47% | 1000 | -46% | 1192 | -76% | 1000 | -58% | 920 | -80% | 1000 | -64% |
| | | -6% | | -4% | | -7% | | 0% | | +2% | | -11% | -10% | | -6% | | -7% | | 0% | | 0% | | 0% | | -2% | | 0% | | -18% | | 0% | |
| Leafy greens* (1 kg) | 1756 | n/a | 1779 | n/a | 1744 | n/a | 1909 | n/a | 2778 | n/a | 873 | n/a | 3333 | n/a | 1125 | n/a | 1015 | n/a | 1978 | n/a | 1250 | n/a | 1250 | n/a | 1323 | n/a | 2333 | n/a | 733 | n/a | n/a | n/a |
| Milk (1 litre) | 1640 | +30% | 2000 | +46% | 1400 | +19% | n/a | n/a | 1286 | +29% | n/a | n/a | n/a | n/a | n/a | 2000 | 0% | n/a | n/a | n/a | n/a | n/a | n/a | n/a | n/a | 1800 | +50% | n/a | n/a | n/a | n/a | |
| | | -4% | | +20% | | -9% | | n/a | | -10% | | n/a | n/a | | n/a | | +11% | | n/a | | n/a | n/a | n/a | n/a | n/a | 0% | | n/a | n/a | n/a | n/a | |
| Firewood* (1 kg) | 397 | n/a | 945 | n/a | 178 | n/a | n/a | n/a | 181 | n/a | 139 | n/a | 241 | n/a | n/a | n/a | 1648 | n/a | 305 | n/a | n/a | n/a | n/a | n/a | 160 | n/a | 67 | n/a | 122 | n/a | n/a | n/a |
| Charcoal* (1 kg) | 689 | n/a | 1065 | n/a | 472 | n/a | 504 | n/a | 323 | n/a | 304 | n/a | 1889 | n/a | 837 | n/a | n/a | n/a | 129 | n/a | 714 | n/a | 714 | n/a | 655 | n/a | 724 | n/a | 774 | n/a | 703 | n/a |
| Laundry soap (1 kg) | 3449 | +43% | 3608 | +9% | 3338 | +67% | 3167 | n/a | 3312 | +66% | 3300 | n/a | -18% | 3650 | -6% | n/a | n/a | 3300 | +65% | 0% | 3500 | 0% | 3300 | +32% | 3300 | n/a | 3300 | +65% | 3825 | +91% | 3667 | +22% |
| | | 0% | | +2% | | -1% | | +6% | | -7% | | 0% | 0% | | 0% | | n/a | | +25% | | +2% | | 0% | | 0% | | 0% | | +7% | | -1% | |

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.

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, the methodology during this round was changed to report average commodity prices. The methodology has also been aligned with the price monitoring system of the Uganda Bureau of National Statistics to the extent possible.

4. One United States Dollar (USD) was equivalent to 3,703 UGX as of 22 June 2020, according to [Oanda currency converter](#).

5. Pre-COVID-19 price data for Adjumani settlement corresponds to prices collected in December 2019. For all other settlements, March 2020 data is used.

Market Monitor – Refugee Hosting Areas

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

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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: | | | % of interviewed traders reporting a change in the number of customers in their marketplace: | | |
|------------------|--|-----|---|--|-----|---|
| Nationwide | INCREASE | 12% | ■ | INCREASE | 11% | ■ |
| | DECREASE | 9% | ■ | DECREASE | 32% | ■ |
| | NO CHANGE | 79% | ■ | NO CHANGE | 57% | ■ |
| Southwest Region | INCREASE | 22% | ■ | INCREASE | 27% | ■ |
| | DECREASE | 9% | ■ | DECREASE | 38% | ■ |
| | NO CHANGE | 69% | ■ | NO CHANGE | 36% | ■ |
| West Nile Region | INCREASE | 8% | ■ | INCREASE | 4% | ■ |
| | DECREASE | 9% | ■ | DECREASE | 30% | ■ |
| | NO CHANGE | 84% | ■ | NO CHANGE | 67% | ■ |

SAFETY AND REGULATIONS

| | % of interviewed traders reporting changes in perceptions of security relating to operating in their marketplace: | | | Top reported reasons by traders for feeling more or less secure: ⁶ | | |
|------------------|---|-----|---|---|--|-----|
| Nationwide | LESS SECURE | 14% | ■ | 1 | Non compliance with official rules and regulations | 50% |
| | MORE SECURE | 15% | ■ | 2 | Increased awareness about health risks and appropriate behaviour | 26% |
| | NO DIFFERENCE | 71% | ■ | 1 | Increased presence of security personnel | 31% |
| Southwest Region | LESS SECURE | 9% | ■ | 2 | Implementation of rules and regulations | 24% |
| | MORE SECURE | 36% | ■ | 1 | Corona infected individuals in the area | 30% |
| | NO DIFFERENCE | 56% | ■ | 2 | Fear of theft | 20% |
| West Nile Region | LESS SECURE | 16% | ■ | | | |
| | MORE SECURE | 7% | ■ | | | |
| | NO DIFFERENCE | 77% | ■ | | | |

STOCK AND SUPPLY

| | % of interviewed traders reporting difficulty in obtaining enough supply to meet demand: | | | % of interviewed traders reporting concern that their stocks will run out within one week following data collection: | | |
|------------------|--|-----|---|--|-----|---|
| Nationwide | YES | 17% | ■ | YES | 13% | ■ |
| | NO | 83% | ■ | NO | 87% | ■ |
| Southwest Region | YES | 8% | ■ | YES | 7% | ■ |
| | NO | 92% | ■ | NO | 93% | ■ |
| West Nile Region | YES | 21% | ■ | YES | 16% | ■ |
| | NO | 79% | ■ | NO | 84% | ■ |

PAYMENT AND LIQUIDITY

| | % of interviewed traders accepting mobile money payments when data was collected: | | | % of interviewed traders reporting mobile money or bank agents closing: | | |
|------------------|---|-----|---|---|-----|---|
| Nationwide | YES | 48% | ■ | YES | 4% | ■ |
| | NO | 52% | ■ | NO | 71% | ■ |
| | | | | DON'T KNOW | 25% | ■ |
| Southwest Region | YES | 67% | ■ | YES | 4% | ■ |
| | NO | 33% | ■ | NO | 80% | ■ |
| | | | | DON'T KNOW | 16% | ■ |
| West Nile Region | YES | 40% | ■ | YES | 4% | ■ |
| | NO | 60% | ■ | NO | 67% | ■ |
| | | | | DON'T KNOW | 30% | ■ |

| | Top 3 reasons why traders reported difficulty in obtaining enough supply to meet demand: ⁷ | | |
|------------|---|--|-----|
| Nationwide | 1 | Difficulty transporting items to marketplace | 62% |
| | 2 | Not enough money to source items | 36% |
| | 3 | Producers not producing enough | 24% |

PREPARED BY: World Food Programme

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

Informing more effective humanitarian action

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6. This indicator refers to the subset of traders who reported feeling more or less secure respectively.
7. Respondents could select multiple response options.