

Market Monitor – Refugee Hosting Areas

Refugee Settlement Price and Market Functionality Snapshot, 1-30 September 2020

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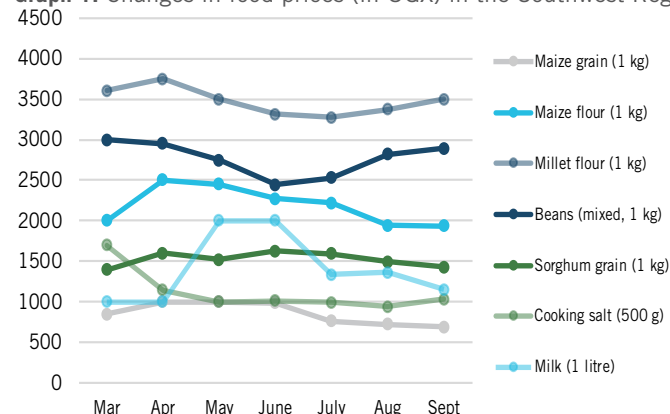
OVERVIEW AND METHODOLOGY

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 1,431,477¹ refugees as of 30 September 2020, with nearly 95% of refugees living in settlements primarily in the West Nile and Southwest regions of Uganda.

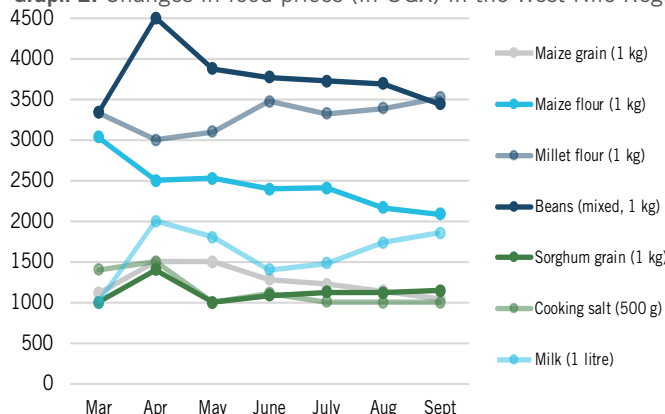
In view of this situation, the World Food Programme (WFP) has established a regular market price monitoring system across refugee settlements to inform cash-based response approaches. These monitoring efforts predate the COVID-19 crisis. However, due to the changing situation since the Ugandan government 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 1-30 September 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, **387 traders** were interviewed nationwide in this round, of these **119 in the Southwest Region (SWR)** and **268 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 September 2020: **433,038 UGX**
▼ **-14%** compared to the full MEB in March 2020.³

Average cost of the **food MEB** in September 2020: **270,630 UGX**
▼ **-19%** compared to the food MEB in March 2020.

MARKET FUNCTIONALITY

- At the national level, 75% of the interviewed traders reported that the **number of vendors** has not changed compared to the week before the COVID-19 outbreak (18th of March). A larger proportion of traders in SWR (18%) reported an increase in the number of vendors compared with WNR (6%).
- At the national level, the reported average **number of customers received per day by interviewed vendors** during the last week was 20, lower than in the last reporting period. The drop in the average daily number of customer in SWR (from 40 to 21) is driving the national figure.
- More than half (56%) of vendors reported accepting **mobile money**. This proportion was higher in SWR (70%) as compared to WNR (50%).
- At the national level, 23% of the interviewed traders reported **difficulties in meeting demand**. In SWR the proportion of traders reporting difficulties has increased (from 12% to 23%) while it has decreased in the WNR (from 35% to 23%).
- Nationwide 20% of traders reported being concerned about their **stocks running out**. In SWR this proportion decrease from 17% to 8% while remained stable in WNR.
- The proportion of traders reporting **feeling more secure** in SWR has increased (from 16% to 23%) and it is higher than in WNR (2%). In WNR the majority of traders reported no change (97%).

KEY CHALLENGES

Top 3 challenges reported by traders⁴:

1	Lack of cash to purchase more stock	57%
2	Price fluctuation of commodities	52%
3	Increased price of transportation	51%

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 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	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

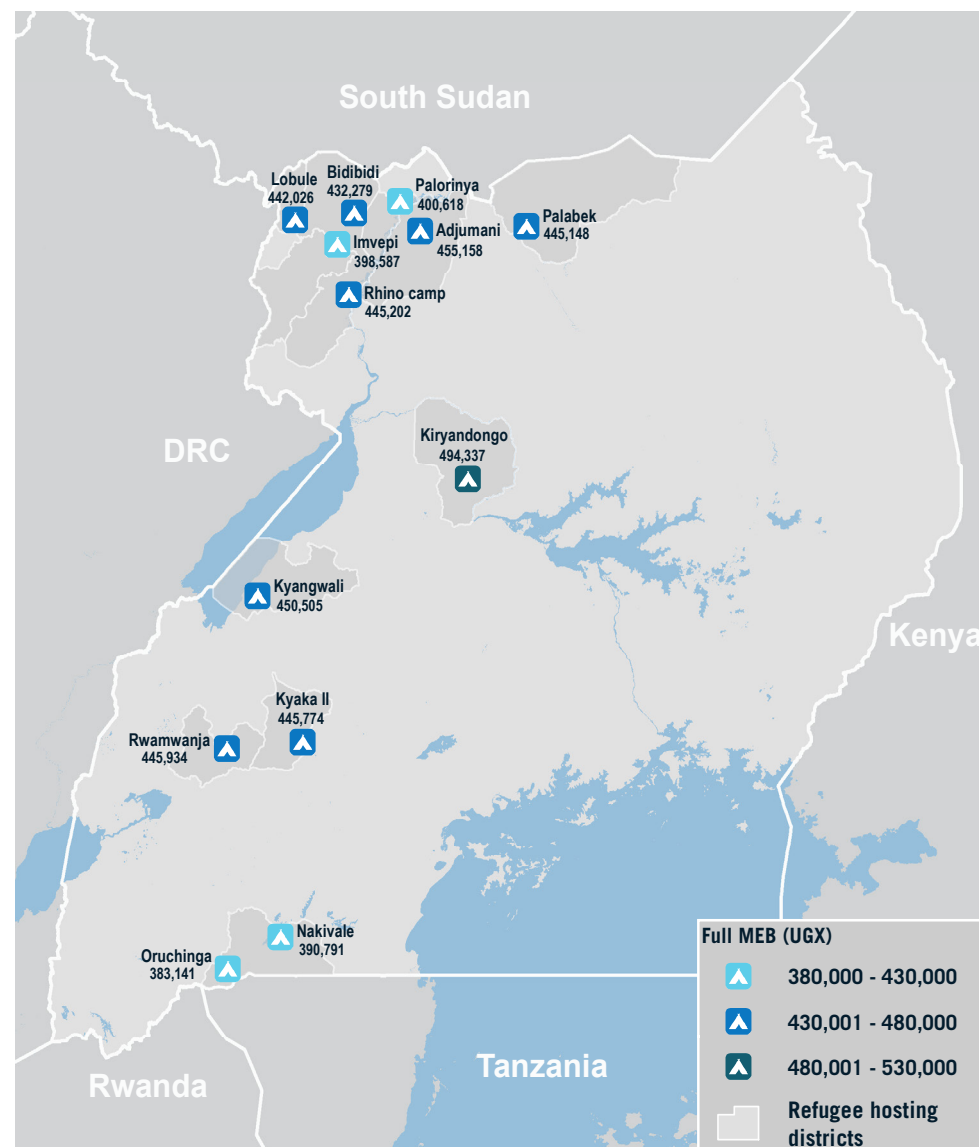
The MEB represents the minimum culturally adjusted group of items required to support a five-person refugee household in Uganda for one month. It is used as an operational tool to identify and quantify the average minimum cost of the regular or seasonal basic needs of a median household that can be covered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

Settlements with the most expensive average full MEB costs:

1. Kiryandongo
2. Adjumani
3. Kyangwali

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

Adjumani	-29%	-4%
Bidibidi	-32%	+5%
Imvepi	-16%	-11%
Kiryandongo	-7%	+3%
Lobule	-10%	-8%
Kyaka II	-3%	+1%
Kyangwali	-17%	+3%
Nakivale	+1%	-5%
Oruchinga	+1%	-5%
Palabek	-14%	-2%
Palorinya	-25%	-4%
Rhino Camp ⁵	-4%	-20%
Rwamwanja	-13%	+3%

5. The decrease of the MEB cost for Rhino Camp is driven by the decrease in the average price of the following items: leafy greens, charcoal and firewood.

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COMMODITY PRICES

Table 1: Average⁶ commodity prices in Uganda Shillings (UGX)⁷, by refugee settlement location, and percentage price change since March (upper)⁸ and last round 1-31 Aug 2020 (lower) respectively.⁹

		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			
		2027	%	1938	%	2082	%	1860	%	1891	%	1713	%	1860	%	2110	%	2000	%	2250	%	1800	%	1638	%	2457	%	1770	%	2441	%	1962	%
MEB food items	Maize flour (1 kg)	2027	-17% -3%	1938	-8% 0%	2082	-23% -4%	1860	-2% -5%	1891	-41% -2%	1713	+14% +4%	1860	-7% -1%	2110	-9% +3%	2000	-13% 0%	2250	-36% -4%	1800	-7% +4%	1638	-15% -5%	2457	-34% -10%	1770	+21% -6%	2441	-2% +5%	1962	-2% -2%
	Fish* (smoked, 1kg)	16923	n/a -6%	17595	n/a 12%	16851	n/a -6%	22560	n/a +1%	16532	n/a +2%	10000	n/a -25%	20417	n/a n/a	20000	n/a n/a	n/a	n/a n/a	11364	n/a +7%	n/a	n/a	7143	n/a n/a	21212	n/a -4%	7292	n/a -34%	9444	n/a -42%	n/a	n/a
	Beans (mixed, 1 kg)	3233	0% -5%	2890	-12% +3%	3439	+8% -7%	3905	+7% -3%	3047	-5% +7%	3870	-3% -3%	3521	-10% -5%	2517	-25% 0%	3200	+8% +22%	3900	-1% -16%	2433	-23% 0%	2356	-15% +5%	2708	+8% -12%	3050	+54% -7%	3310	-8% -16%	2937	-10% +5%
	Sorghum grain (1 kg)	1231	+5% -1%	1427	-1% -5%	1141	+11% +2%	1112	-26% +1%	1017	+10% -13%	1522	+60% +38%	1100	+2% -8%	1938	-3% +11%	2075	+60% +17%	1440	+7% +9%	1330	-13% -14%	1412	-5% +5%	638	-36% -29%	1030	+10% -10%	1467	+39% +10%	n/a	n/a
	Cooking oil (1 litre)	5741	+1% -2%	5872	0% -2%	5676	+2% -2%	6000	0% 0%	4875	-8% -6%	4239	-47% -10%	5609	-10% -1%	6000	+7% +1%	6000	0% -7%	5890	+10% +1%	5846	+4% -4%	6000	0% 0%	6000	+20% 0%	5450	+5% -4%	6161	-1% +6%	5933	+5% -1%
	Fresh cassava* (1 kg)	608	n/a -16%	445	n/a -36%	637	n/a -12%	599	n/a +7%	508	n/a +11%	1000	n/a -31%	400	n/a 0%	394	n/a n/a	n/a	n/a n/a	730	n/a +6%	n/a	n/a	800	n/a n/a	301	n/a -1%	225	n/a -69%	972	n/a +63%	n/a	n/a
	Cooking salt (500 g)	1011	-57% +3%	1032	-51% +10%	1000	-60% 0%	1000	+30% 0%	1000	-59% 0%	1000	-23% 0%	1000	-48% +19%	978	-64% +9%	1500	-17% +50%	1000	-35% 0%	1000	-47% 0%	1000	-46% 0%	1000	-80% 0%	1000	-58% 0%	1000	-79% 0%	981	-65% -2%
	Leafy greens* (1 kg)	1490	n/a -26%	1275	n/a -41%	1523	n/a -24%	1927	n/a +40%	2605	n/a +3%	833	n/a -72%	3333	n/a 0%	885	n/a n/a	n/a	n/a n/a	820	n/a -13%	n/a	n/a	625	n/a n/a	1652	n/a +17%	1083	n/a -35%	944	n/a -77%	1429	n/a n/a
	Milk (1 litre)	1625	+14% 0%	1154	-16% -15%	1852	+27% +3%	2000	-20% 0%	1250	+25% -6%	n/a	n/a n/a	n/a	n/a n/a	1000	0% 0%	2000	0% 0%	2000	+7% +33%	1000	0% -32%	n/a	n/a n/a	2000	+67% +9%	1500	-25% +7%	2000	-20% 0%	1000	0% 0%
	MEB NFI items	Firewood* (1 kg)	219	-42% -15%	364	+19% +9%	214	-48% -16%	187	-37% -19%	181	-69% -11%	231	-23% +22%	364	+9% +9%	n/a	n/a n/a	n/a	n/a n/a	243	+82% -3%	n/a	n/a n/a	n/a	n/a n/a	152	-23% -2%	276	-45% -3%	222	+41% -49%	n/a
Laundry soap (1 kg)		3312	+20% +1%	3638	+2% +6%	3183	+35% 0%	2964	-15% -1%	3000	+50% -4%	3300	+10% 0%	3967	-1% +20%	3500	-10% -2%	n/a	n/a n/a	3300	+65% 0%	3500	0% +8%	3300	+32% 0%	3300	-18% 0%	3300	+65% 0%	3250	+62% -2%	3625	+21% -1%
Underwear (1 piece)		2402	n/a -15%	2562	n/a -6%	2346	n/a -17%	2385	n/a -6%	1100	n/a -25%	2417	n/a -14%	1857	n/a n/a	4000	+33% n/a	3500	+11% +11%	1000	n/a -20%	3000	n/a +20%	2000	n/a 0%	3500	n/a -28%	2000	n/a -14%	1917	n/a +64%	3000	n/a 0%
Big jerry can (20L, 1 piece)		6805	+11% +6%	6538	+7% +13%	6880	+11% 0%	6571	+10% +6%	6667	+33% -11%	7500	+7% -4%	7000	+17% +40%	6300	+5% +8%	6500	+8% +8%	7250	-9% -3%	6500	+8% +18%	7500	+7% +25%	6958	-13% -1%	6500	+8% +5%	6800	-15% -3%	6000	0% 0%
non-MEB items	Dry cells (1 packet)	1969	+18% n/a	1750	-4% n/a	2042	+30% n/a	2000	+33% n/a	1500	0% n/a	2417	+21% n/a	1526	+2% n/a	2250	+12% n/a	2000	0% n/a	1583	+6% n/a	n/a	n/a n/a	n/a	n/a n/a	1826	+22% n/a	4000	+167% n/a	1500	-25% n/a	2333	+17% n/a
	Disposable torch (1 packet)	973	-8% +3%	1000	-7% +5%	963	-8% +3%	929	-7% +8%	n/a	n/a n/a	n/a	n/a n/a	n/a	n/a n/a	1000	0% 0%	1000	0% 0%	1000	0% 0%	1000	0% 0%	1000	0% +100%	1000	0% 0%	1000	0% n/a	917	-8% n/a	1000	0% 0%
	Millet flour (1 kg)	3509	-6% +4%	3498	-1% +4%	3518	-10% +4%	4000	+23% +2%	3778	-9% -1%	3000	-14% 0%	3904	-2% +12%	3273	+9% -4%	3250	-11% +4%	3500	-2% 0%	3385	-6% +2%	3643	-9% -3%	3150	-10% +5%	4250	+21% +3%	3787	-24% +26%	3357	+49% +2%
	Maize grain (1 kg)	911	-12% -9%	691	-21% -5%	1042	-8% -8%	1061	-29% -15%	1000	-8% +9%	1130	+13% +9%	576	-49% -18%	787	-17% +3%	600	-8% +17%	875	-29% -15%	792	-3% -1%	783	-2% -2%	708	-29% -31%	920	-28% -1%	1553	+12% +13%	657	-29% -15%
	Charcoal* (1 kg)	666	n/a -37%	855	n/a n/a	613	-48% -42%	725	-6% -12%	333	-57% -50%	694	+178% -65%	1429	n/a n/a	837	n/a n/a	n/a	n/a n/a	126	-76% -8%	n/a	n/a n/a	833	-17% n/a	614	-8% -37%	538	-89% +6%	806	+61% -63%	742	-26% n/a

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.

6. 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.

7. One United States Dollar (USD) was equivalent to 3,671 UGX as of 9th of September 2020, according to [Banda currency converter](#).

8. 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).

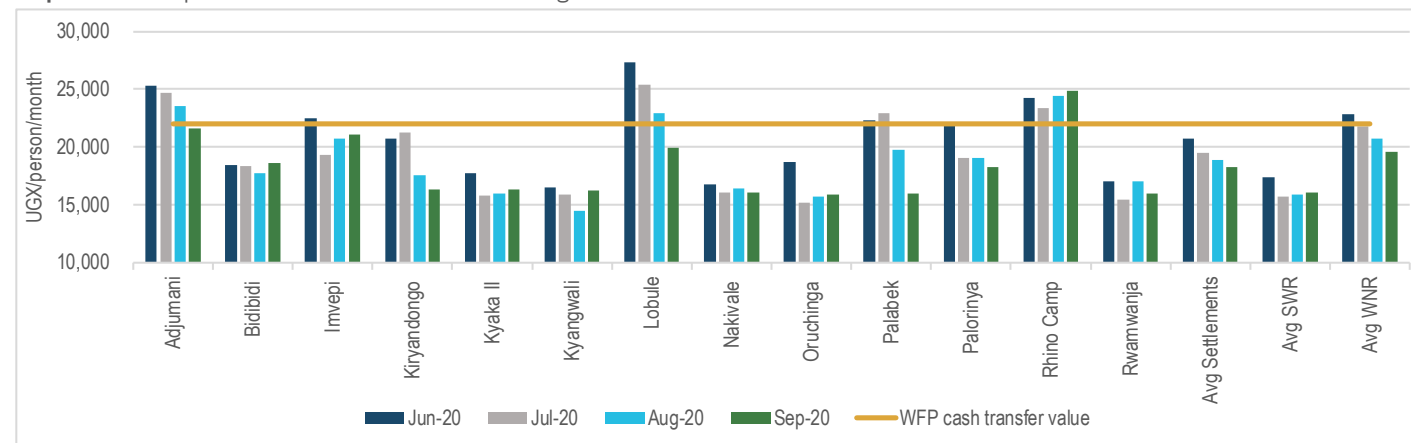
9. Regional and national price aggregations are only reported, if enough price data exists across various settlements. Price changes are only reported where price data for a given item exists for both this reporting round and the reference periods, i.e. March 2020 and the last reporting round.

ANALYSIS OF WFP GENERAL FOOD ASSISTANCE (GFA) FOOD BASKET

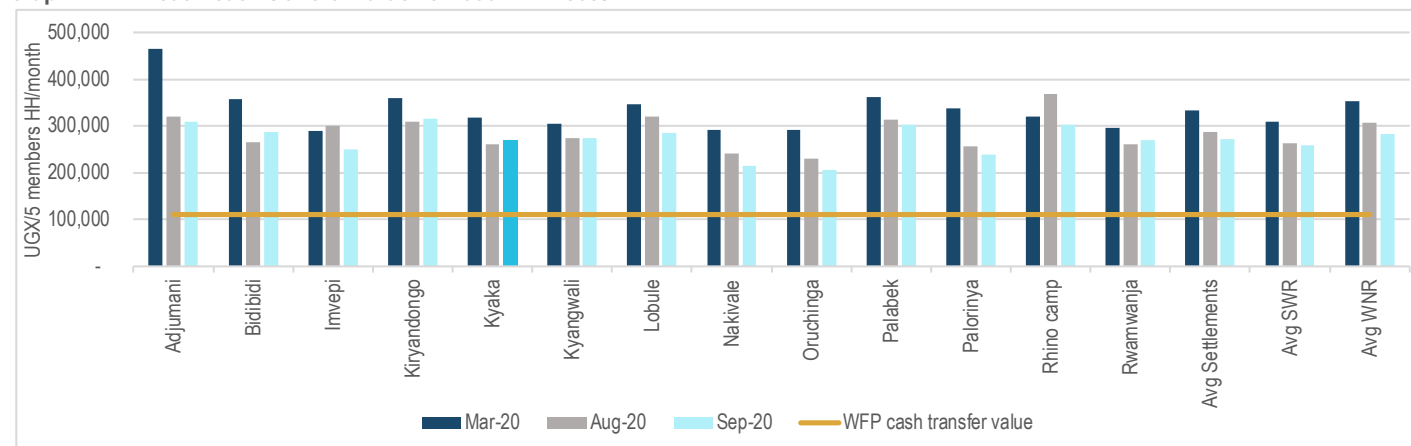
The analysis focuses on the market prices of commodities that make up the in-kind food basket that WFP provides to refugees for General Food Assistance (GFA) and compares the price of the GFA food basket with the GFA cash transfer value (22,000 UGX per person per month). The food basket consists of the following items and quantities: 8.84 kg of maize grain, 2.1 kg of beans, 0.63 kg of vegetable oil, and 0.15 kg of salt per person per month. The quantities represent 70% of the normal WFP GFA basket as a result of ration cuts that were implemented starting April 2020.

- The average market price of the GFA food basket has consistently decreased since June 2020. In most settlements, the average market price in September 2020 was lower than in August 2020. Overall, the cost of the GFA food basket reduced by 3% from August to September (Graph 3).
- As a result of the decrease in cost, the WFP cash transfer value on average covered 120% of the cost of the food basket. In the month of September, the cash transfer value covered the cost of the food basket in all settlements except Rhino Camp.
- The average price of the food basket in the SWR was lower than in the WNR. In the SWR, the average market price of the food basket decreased marginally (by 1%). The WFP cash transfer value could thus cover 136% of the cost of the food basket in September.
- In the WNR, the average market price of the food basket decreased by 5%, meaning the WFP cash transfer value could thus cover 112% of the cost of the food basket in September.
- In September, the food basket was most expensive in Rhino Camp (24,861 UGX) and Adjumani (21,660 UGX) settlements, where the WFP cash transfer value covered 88% and 102% of the cost of the food basket respectively.
- In September, the food basket was least expensive in Oruchinga (15,949 UGX) and Rwamwanja (16,008 UGX) settlements, where the WFP cash transfer value covered 138% and 137% of the cost of the food basket respectively.

Graph 3: Market price of the GFA food basket in refugee settlement locations



Graph 4: WFP cash transfer value vs. food MEB cost



The analysis further compares the WFP cash transfer value with the cost of the food MEB (detailed in page 2) across settlements.

- The cost of the food MEB in September was lower than the reference value (March 2020) in all settlements (Graph 4). Overall, the cost of the food MEB was 19% lower than the reference food MEB cost, decreasing 5% percent from 286,190 UGX in August to 270,630 UGX in September.
- Regional differences exist in terms of the cost of the food MEB. In the SWR and WNR, the food MEB cost was 23% and 18% lower than the national reference food MEB cost respectively.
- Overall, the WFP cash transfer value only covered 41% of the food MEB cost (43% in the SWR and 39% in WNR) in September.
- The food MEB cost was most expensive in Kiryandongo (315,925 UGX) and Adjumani (309,607 UGX) settlements, where the WFP cash transfer value only covered 35% and 36% of the food MEB cost respectively. It was least expensive in Oruchinga (206,304 UGX) and Nakivale (213,504 UGX) settlements where the WFP transfer value covered 53% and 52% of the food MEB cost respectively.

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MARKET FUNCTIONALITY

Unless specified otherwise, 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 vs pre-COVID-19 week: ¹⁰	Average numbers of customers per day reported by interviewed traders: ¹¹
Nationwide	INCREASE 10%	JULY 23
	DECREASE 15%	AUGUST 29
	NO CHANGE 75%	SEPTEMBER 20
Southwest Region	INCREASE 18%	JULY 33
	DECREASE 11%	AUGUST 40
	NO CHANGE 71%	SEPTEMBER 21
West Nile Region	INCREASE 6%	JULY 19
	DECREASE 16%	AUGUST 18
	NO CHANGE 77%	SEPTEMBER 20

SAFETY

	% 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: ¹²
Nationwide	LESS SECURE 7%	1 Market is less crowded 7%
	MORE SECURE 8%	2 Non-compliance with official rules and regulations of COVID-19 prevention 5%
	NO DIFFERENCE 84%	
Southwest Region	LESS SECURE 21%	1 Market is less crowded 20%
	MORE SECURE 23%	2 Non-compliance with official rules and regulations of COVID-19 prevention 16%
	NO DIFFERENCE 56%	
West Nile Region	LESS SECURE 1%	1 Non-compliance with official rules and regulations of COVID-19 prevention 1%
	MORE SECURE 2%	2 Implementation of rules and regulations 1%
	NO DIFFERENCE 97%	

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 23%	YES 20%
	NO 77%	NO 80%
Southwest Region	YES 23%	YES 8%
	NO 77%	NO 92%
West Nile Region	YES 23%	YES 25%
	NO 77%	NO 75%

PAYMENT AND LIQUIDITY

	% of interviewed traders accepting mobile money payments when data was collected:
Nationwide	YES 56%
	NO 44%
Southwest Region	YES 70%
	NO 30%
West Nile Region	YES 50%
	NO 50%



Nationwide	Top 3 reasons why traders reported difficulty in obtaining enough supply to meet demand: ¹³	1 Supplier unable to provide enough 11%
		2 Can no longer obtain items due to restrictions 5%
		3 Producers not producing enough 4%





PREPARED BY:



ON BEHALF OF:

Uganda Cash Working Group, Market Analysis Task Force

10. Pre-COVID-19 week is considered the week before declaration of restriction in Uganda (18th of March 2020).

11. The averages reported in this category reflect data collected in the last half of July while those reported for August concern the whole month.

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

13. This indicator refers to the subset of traders who reported difficulties in meeting demand. Respondents could select multiple response options.