

Market Monitor – Refugee Hosting Areas



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

UGANDA

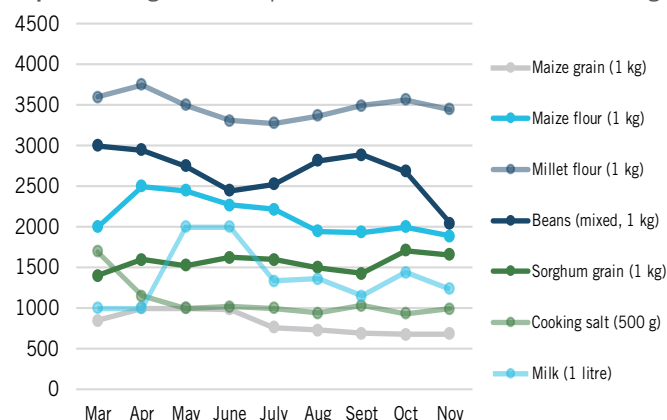
OVERVIEW AND METHODOLOGY

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 1,442,138¹ refugees as of 30 November 2020, with nearly 95% of refugees living in settlements primarily in the West Nile and Southwest regions of Uganda.

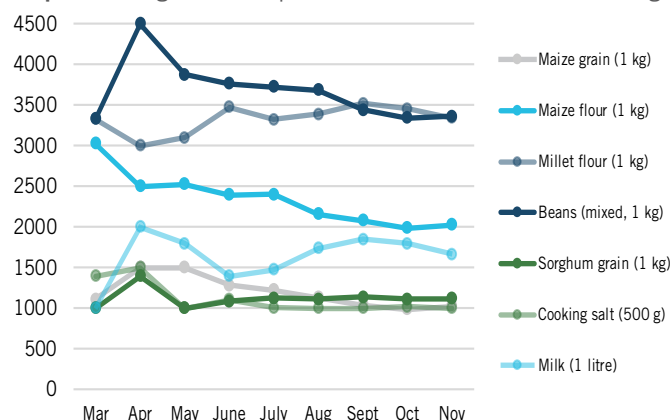
In view of this situation, the World Food Programme (WFP) has established a regular market price monitoring system across refugee settlements to inform cash-based response approaches. These monitoring efforts predate the COVID-19 crisis. However, due to the changing situation since the Ugandan government 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 November 2020. Data was collected remotely, using the mobile Vulnerability Analysis and Mapping (mVAM) phone-based survey system. Data for sold loose items was collected in person with items purchased and weighted where possible. 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, **258 traders** were interviewed nationwide in this round, of these **83 in the Southwest Region (SWR)** and **175 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 November 2020: **432,604 UGX**
▼ **-14%** compared to the full MEB in March 2020.³

Average cost of the **food MEB** in November 2020: **271,831 UGX**
▼ **-19%** compared to the food MEB in March 2020.

- At the national level, the large majority (94%) of the interviewed traders reported that the **number of vendors** has not changed compared to the week before. A larger proportion of traders in SWR (15%) reported an increase in the number of vendors compared with WNR (1%).
- Nearly half (46%) of vendors reported accepting **mobile money**. Across regions, this proportion was slightly higher in SWR (49%) as compared to WNR (44%).
- While 84% of traders nationwide reported no difficulties in **meeting demand**, 28% expressed concerns about running out of stock within one week. This percentage was higher in the WNR (39%) compared to SWR where only 6% of traders expressed this concern.
- There was no major change in the perceptions of **security** among vendors. Nationwide, 95% reported no change in their feelings of security compared to the week prior. This figure was slightly lower in the SWR (90%).
- The cost of the **general food assistance (GFA)** basket decreased marginally by 1% from October to November 2020. The WFP cash transfer value covered 112% in WNR and 158% in SWR, covering average GFA costs in all settlements except Rhino camp where it only covered 91%.
- The cost of the **MEB** remained relatively stable from the past round. The WFP cash transfer value could cover, on average, only 40% of the food MEB cost.

KEY CHALLENGES

Top 3 challenges reported by traders⁴:

1	Lack of cash to purchase more stock	67%
2	Increased price of transportation	63%
3	Price fluctuation of commodities	52%

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

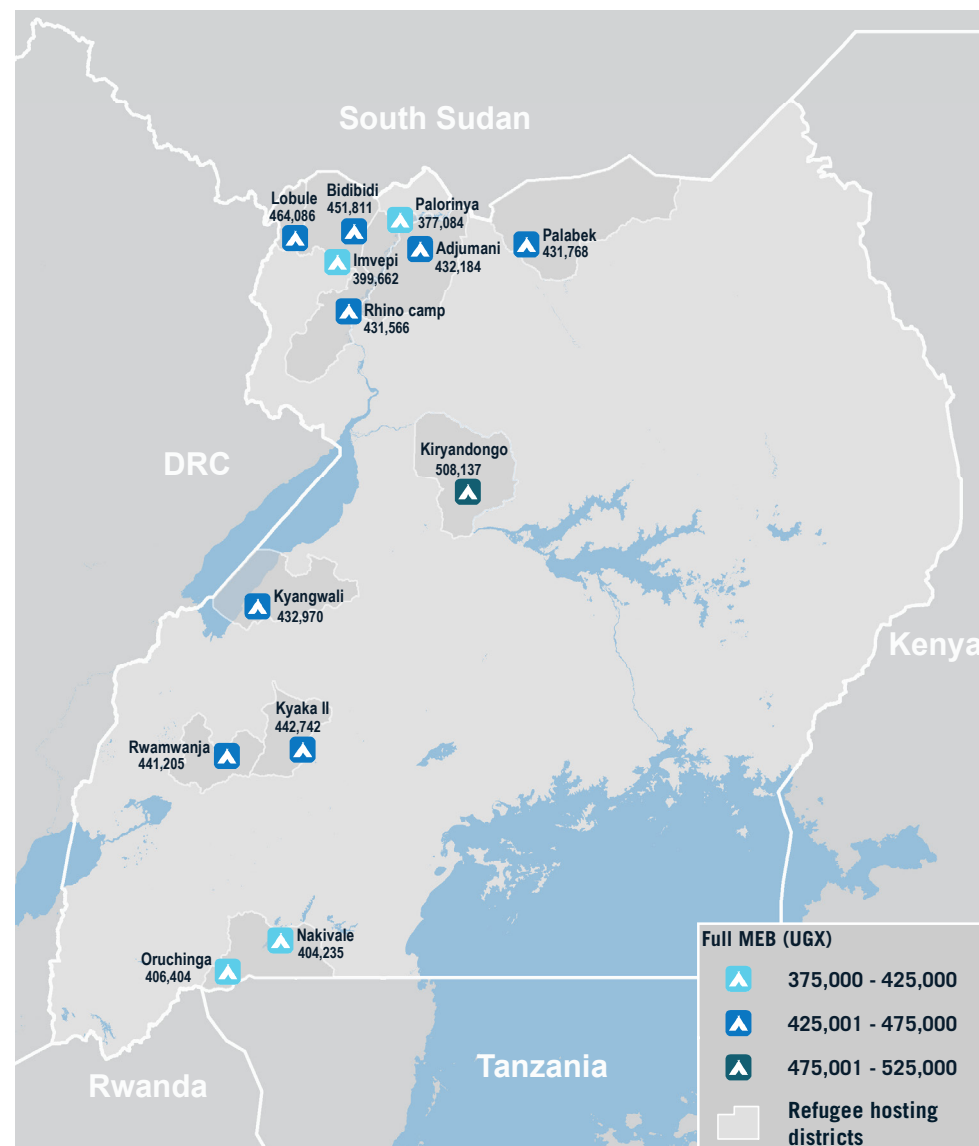
The MEB represents the minimum culturally adjusted group of items required to support a five-person refugee household in Uganda for one month. It is used as an operational tool to identify and quantify the average minimum cost of the regular or seasonal basic needs of a median household that can be covered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

Settlements with the most expensive average full MEB costs:

1. Kiryandongo
2. Lobule
3. Bidibidi

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

Adjumani	-31%	+2%
Bidibidi	-21%	0%
Imvepi	-12%	+1%
Kiryandongo	-5%	+8%
Lobule	-6%	-3%
Kyaka II	-6%	+3%
Kyangwali	-10%	-2%
Nakivale	-8%	-3%
Oruchinga	-8%	-2%
Palabek	-16%	-1%
Palorinya	-30%	-5%
Rhino Camp	-7%	+2%
Rwamwanja	-11%	-2%

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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 Oct 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	
			1966	1887	2026	2158	1991	1567	2000	2000	2000	2000	2000	2250	1609	1622	2000	1711	2667	1927												
MEB food items	Maize flour (1 kg)	-20% -1%	-11% -6%	-25% +2%	+14% +7%	-38% +5%	+4% -3%	+1% -5%	-14% -2%	-13% -6%	-36% 0%	-17% +6%	-16% -5%	-47% 0%	+17% -7%	+7% 0%	-4% -2%															
	Fish* (smoked, 1kg)	n/a -7%	n/a +15%	n/a -9%	n/a n/a	n/a n/a	n/a -48%	n/a -19%	n/a n/a	n/a n/a	n/a +6%	n/a n/a	n/a n/a	n/a n/a	n/a -16%	n/a -38%	n/a +59%	n/a n/a														
	Beans (mixed, 1 kg)	-12% -9%	-37% -24%	+6% +1%	-1% -1%	+4% 0%	-16% -2%	-22% -2%	-48% -28%	-52% -43%	-18% 0%	-37% -14%	-27% -21%	+32% +9%	+63% +6%	-6% 0%	-43% -33%															
	Sorghum grain (1 kg)	+12% +1%	-18% -3%	+9% 0%	-19% +9%	+7% +4%	+58% -2%	+19% +3%	0% +6%	+57% -25%	+6% +3%	-3% -6%	+16% +11%	-38% -1%	+19% +1%	+42% +5%	n/a n/a															
	Cooking oil (1 litre)	0% +1%	+2% +2%	0% 0%	0% +1%	-11% -6%	-47% +3%	-5% +4%	+9% +2%	0% 0%	+7% +6%	0% 0%	0% 0%	+20% -2%	+14% +5%	+2% 0%	+7% 0%															
	Fresh cassava* (1 kg)	n/a +6%	n/a +45%	n/a -4%	n/a n/a	n/a +29%	n/a -7%	n/a +187%	n/a n/a	n/a n/a	n/a n/a	n/a -10%	n/a +55%	n/a -14%	n/a +3%	n/a -24%	n/a -25%	n/a n/a														
	Cooking salt (500 g)	-58% +1%	-53% +6%	-60% -2%	+30% 0%	-59% 0%	-23% -4%	-51% +1%	-66% +9%	-38% +11%	-35% 0%	-47% 0%	-80% 0%	-58% 0%	-79% 0%	-64% +5%																
	Leafy greens* (1 kg)	n/a +53%	n/a +115%	n/a +39%	n/a n/a	n/a +4%	n/a +87%	n/a n/a	n/a n/a	n/a n/a	n/a -2%	n/a 0%	n/a +60%	n/a -5%	n/a +16%	n/a +48%	n/a n/a															
MEB NFI items	Milk (1 litre)	+3% -15%	-10% -14%	+15% -7%	n/a n/a	n/a n/a	+25% 0%	n/a n/a	+12% +19%	0% n/a	n/a n/a	+7% 0%	+60% n/a	n/a n/a	-25% +13%	-20% 0%	0% n/a															
	Firewood* (1 kg)	-20% -7%	+228% n/a	-47% -33%	n/a n/a	n/a n/a	-66% +5%	-30% +32%	0% n/a	n/a n/a	n/a -13%	n/a n/a	n/a n/a	-29% -18%	-64% -81%	-15% +26%	n/a n/a															
	Laundry soap (1 kg)	-3% -19%	-11% -11%	+4% -24%	n/a n/a	n/a n/a	+69% +4%	-33% -39%	-18% -9%	-6% 0%	n/a n/a	-43% -39%	+32% -6%	-50% -39%	0% -39%	+75% +6%	+8% -7%															
	Underwear (1 piece)	n/a -11%	n/a -2%	n/a -13%	n/a n/a	n/a n/a	n/a +9%	n/a 0%	n/a +6%	n/a n/a	n/a -17%	n/a 0%	n/a -33%	0% -25%	+29% n/a	n/a n/a	n/a n/a															
	Big jerry can (20L, 1 piece)	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 n/a	n/a n/a	n/a n/a	n/a n/a	n/a n/a	n/a n/a															
	Dry cells (1 packet)	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 n/a	n/a n/a	n/a n/a	n/a n/a	n/a n/a	n/a n/a															
	Disposable torch (1 packet)	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 n/a	n/a n/a	n/a n/a	n/a n/a	n/a n/a	n/a n/a															
	non-MEB items	Millet flour (1 kg)	-9% -3%	-2% -3%	-14% -3%	-21% -28%	-4% 0%	-14% 0%	-15% -19%	+11% 0%	-15% -3%	-2% 0%	+12% +4%	-19% +1%	-11% +2%	-40% -8%	-34% +5%															
Maize grain (1 kg)		-13% +2%	-21% +2%	-10% +4%	-29% +3%	+2% +2%	+7% +1%	-36% +12%	-22% -2%	-12% +4%	-19% +7%	-11% +1%	-8% +1%	-17% 0%	-37% -4%	+8% +24%	-10% -10%															
Charcoal* (1 kg)		n/a +4%	n/a -22%	n/a -1%	n/a n/a	n/a n/a	-58% 0%	n/a 0%	n/a n/a	n/a n/a	n/a n/a	-65% -36%	-94% +6%	-21% +18%	n/a n/a	n/a 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 3,690 UGX as of 9th of January 2021, according to [Danda 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).

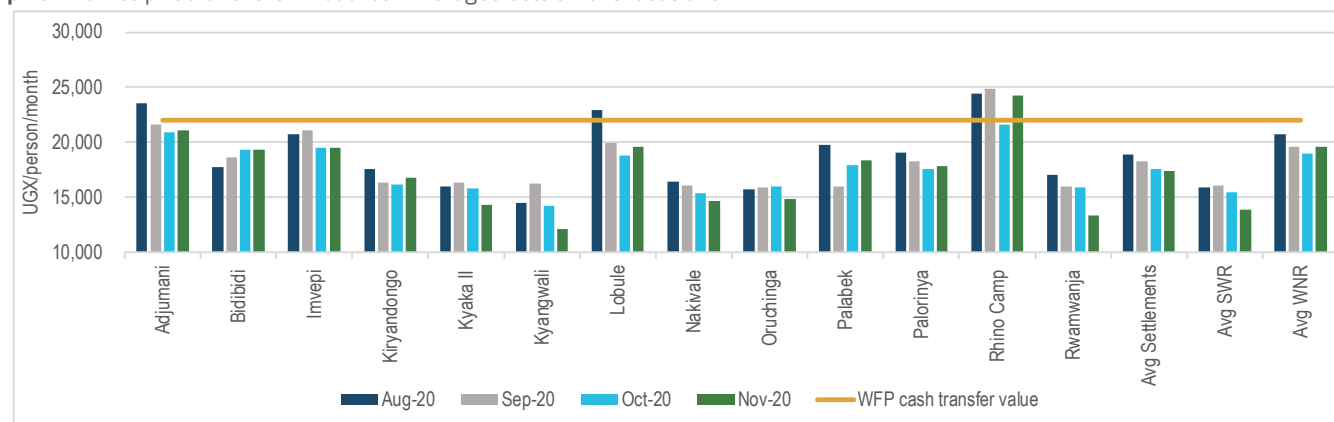
9. Regional and national price aggregations are only reported, if enough price data exists across various settlements. Price changes are only reported where price data for a given item exists for both this reporting round and the reference periods, i.e. March 2020 and the last reporting round.

ANALYSIS OF WFP GENERAL FOOD ASSISTANCE (GFA) BASKET

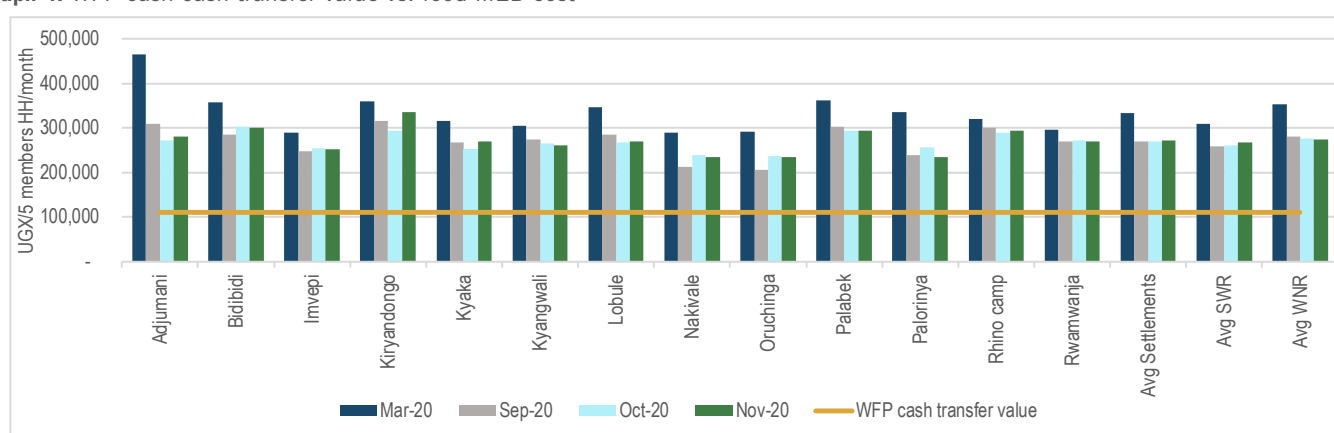
The analysis focuses on the market prices of commodities that make up the in-kind food basket that WFP provides to refugees for GFA and compares the price of the GFA basket with the GFA cash transfer value (22,000 UGX per person per month). The food basket consists of the following items and quantities: 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 basket has consistently decreased since August 2020. Overall, the cost of the WFP GFA food basket decreased marginally by 1% from October to November 2020 (Graph 3). Although the overall cost decreased by 1%, most settlements saw a slight increase in average market price for the GFA from October to November.
- The WFP cash transfer value on average covered 126% of the cost of the food basket. In November, the cash transfer value covered the cost of the food basket in all settlements except Rhino camp. Regionally, the transfer value covered 112% of the average cost of the WFP GFA basket in WNR and 158% in SWR.
- The average price of the food basket in the SWR was lower than in the WNR. In the SWR, the average price decreased by 10% from 15,431 UGX to 13,891 UGX while in the WNR, the average price increased by 3% from 18,971 UGX to 19,598 UGX.
- In November, the food basket was most expensive in Rhino Camp (24,277 UGX) and Adjumani (21,098 UGX) settlements, where the WFP cash transfer value covered only 91% and 104% of the cost of the food basket respectively.
- In October, the food basket was least expensive in Kyangwali (12,158 UGX) and Rwamwanja (13,363 UGX) settlements, where the WFP cash transfer value covered 181% and 165% of the cost of the food basket respectively.

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



Graph 4: WFP cash 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 November was lower than the reference value (March 2020) in all settlements (Graph 4). Overall, similar to October, the cost of the food MEB was 19% lower than the reference food MEB cost, remaining stable from 268,739 UGX in October to 271,831 UGX in November.
- Regional differences exist in terms of the cost of the food MEB. In South West and West Nile settlements, the food MEB was 20 percent and 18 percent respectively lower than the national reference food MEB of March 2020.
- In November, the WFP cash transfer value only covered 40% of the food MEB cost (41% in the SWR and 40% in WNR).
- The food MEB cost was most expensive in Kiryandongo (336,300 UGX), where the WFP cash transfer value only covered 33% of the food MEB cost. It was least expensive in Palorinya (233,645 UGX) where the WFP transfer value covered 47% of the food MEB cost.

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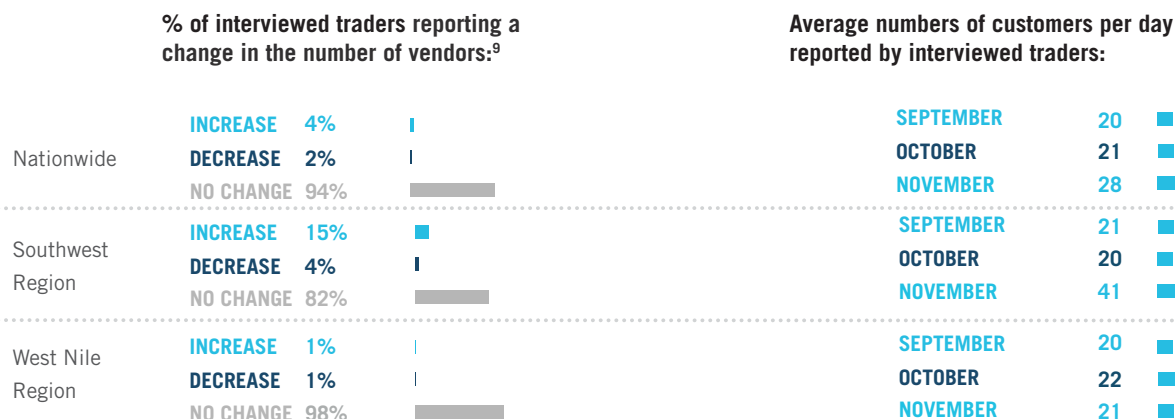
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MARKET FUNCTIONALITY

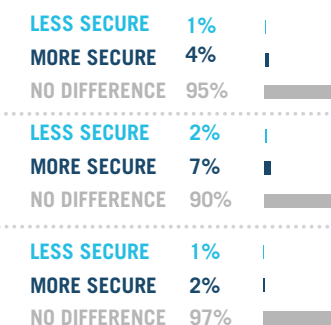
Unless specified otherwise, the following results refer to a recall period of one week prior to data collection.

TRADER AND CUSTOMER BEHAVIOR

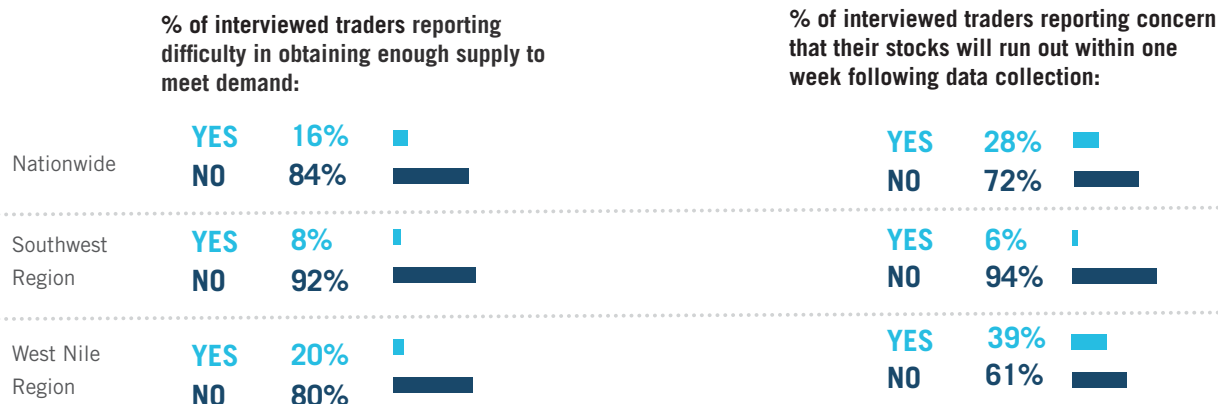


SAFETY

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

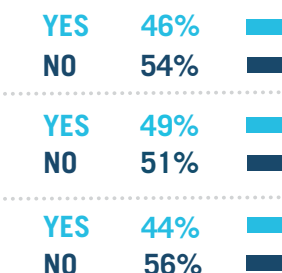


STOCK AND SUPPLY



PAYMENT AND LIQUIDITY

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



Nationwide
Top 3 reasons why traders reported difficulty in obtaining enough supply to meet demand:¹⁰

- 1 Supplier unable to provide enough 9%
- 2 Not enough money to source items 2%
- 3 Can no longer obtain items due to restrictions 2%

PREPARED BY:



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ON BEHALF OF:

Market Analysis Task Force



9. Due to a technical issue with the data collection tool some responses in the SWR had to be excluded; remaining n = 55 in SWR.

10. This indicator refers to all the interviewed vendors. Respondents could select multiple response options.