



# Market Assessment in Refugee Areas 2016-2017



**vam**AME  
food security analysis

**Analysis Monitoring & Evaluation (AME) Unit**  
**Uganda Country Office**



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## RAPID MARKET ASSESSMENT BIDI-BIDI SETTLEMENT YUMBE

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*Swinga 2 Market*



*Miller at Kigo Market*

## Introduction:

WFP Analysis, Monitoring and Evaluation (AME) Unit together with the Supply Chain Unit conducted a two days (22<sup>nd</sup>-23<sup>rd</sup> November 2016) rapid market assessment in Bidi-Bidi refugee settlement to get a general understanding of two key issues.

One, to ascertain the nature and capacity of markets within the settlement to support cash transfers and two, to determine the current availability and use of milling machines within/close to the settlement so as to better advise management on the feasibility of introducing milling vouchers.

Bidi-Bidi currently has five zones and the first four zones were visited as Zone five is relatively new with minimal market activity.

The data was collected through structured interviews with key informants including traders, market chairpersons, local leaders and OPM staff (RDO). In addition a Market Observation Checklist was also used during the rapid market assessment to collect price data on available food commodities.

## Summary of Findings:

### ***Market capacity to respond to any potential increased demand as a result of WFP Cash Transfers***

- The markets are nascent and less than 3 months old. There are no permanent market structures in the settlement, only makeshift (temporary) stalls without roofs and a few roofed with tarpaulins.

Majority of the traders (about 80%) are from the local population (nationals) with refugees accounting for 20%.

- There are close to 500 business/traders across Bidi-Bidi Settlement dealing in different food and nonfood commodities in the four zones (1-4).

However the majority of these traders (90%) operate on small scale with limited operational capital ranging between UGX 100, 000 to UGX 500,000 per month and have no storage facilities.

A few medium scale traders from neighboring districts have operational capital ranging between UGX 1,000,000 and UGX 5,000,000 per month but reported having their main shops in Yumbe and Koboko towns (approximately 20 Kilometers from the settlement)

One crucial point to note is that security was not cited as a major constraint.

- Nationals mainly sell fresh food commodities like cassava tubers, sweet potatoes, fruits, green vegetables, tomatoes and dried fish.

The local traders dealing in fresh foods are mainly women who sell produce grown in local gardens and / or sourced from local farmers. During Focus Groups, local traders indicated that last season's harvest was not good and this resulted in lowered supply of cereals and beans in region.

- By contrast, majority of the refugee traders are men mainly dealing in general merchandise, such as, purchased from Yumbe, Koboko and Arua. Therefore the nearest source of supplies is Yumbe about 20 km from Bidi-Bidi settlement.
- There is a relatively good turn up of buyers on a daily basis. The largest market in Bidi-Bidi sees close to 1000 customers per day. However, the quantities bought are small due to low purchasing power. This is the reason why traders can function on very little operating capital (see above)
- Beans and Maize were not widely seen in the markets; and where sold was sourced predominantly from WFP food assistance with small proportion purchased from Yumbe, Koboko and Arua.

The stocks for these commodities were low among the traders as they indicated that they could not purchase bigger quantities since they are the same commodities distributed for free by WFP on a monthly basis.

- There were no weighing scales except in butchers. Traders use containers which they can easily equate to standard metric systems like Kilograms and liters.
- The prices for processed goods are in most cases set collectively among the traders e.g. all traders had agreed to sell a 300ml bottle (fanta) of vegetable oil at UGX 1500; a kilogram of sugar at UGX 4000.

Traders expected prices of food commodities to increase in the next three months due to increased demand as a result of the refugee influx yet the last season's harvest was not good.

- Most of the local traders indicated that they had limited capacity to expand their supply if their current buyers doubled.

They highlighted limited capital as a barrier since they would need more money to travel to other districts to purchase the required food commodities.

A few traders who come from Yumbe, Koboko and Arua towns indicated that they could increase supply with the increased demand as long as it's gradual and they would replenish stocks in two weeks' time.

- Challenges mentioned by the traders include, low purchasing power by the refugees; limited capital; high transportation costs from Yumbe, Koboko and Arua; lack of storage facilities/permanent structures; scarcity of commodities and; inadequate sanitary facilities in some markets (specifically Kigo-Yoyo1 Zone three).

### ***Milling Facilities***

- There were milling machines in all zones of the settlement and some of the millers interviewed owned more than one milling machine. Currently we have about 16 registered millers and 40 milling machines.
- The cost of milling 1kg of maize is UGX 200 (USD 60 cents) and UGX 150 (USD 50 cents) for sorghum.
- The loss factor through milling is almost negligible as the husk is not removed during the milling process.
- Millers are willing to expand on existing capacity if demand is guaranteed

Given the above, there is certainly the potential for WFP to conduct a more thorough assessment of the feasibility and way forward to introducing milling vouchers in the settlement.

### **Recommendations**

1. Markets exist but at initial stages of development predominantly occupied by small scale traders with limited capital and capacity to match sudden increase in demand for food commodities. Therefore, general cash transfers should be considered at a later stage (for example mid 2017) and should be gradual. This was a view also shared in the Bidi-Bidi Interagency RAM Highlights Nov 7<sup>th</sup> – 9<sup>th</sup> 2016.

Another factor highlighted by local leaders, farmers and traders was the fact that the recent harvest in the region has been below average resulting in lowered food availability.

2. On a positive note, there is potential for market development across the settlement. Therefore, partners should put emphasis on how the existing markets can be developed to support cash transfer interventions. This is crucial

as there is a risk that markets in Bidi-Bidi might remain stagnant or evolve very slowly due to the existing low purchasing power among the refugees.

- There is need to sensitize traders from other districts about the potential market in the settlement as a result of cash transfers and this can be done through radio programs.
- Similarly, other options to increase awareness and kick-start rudimentary market development ought to be explored.

3. Keeping in mind the above factors, at this point a implementation of 100% cash transfers in Bidi-Bidi settlement ought not to be considered as the population is relatively large; as things stand there is not enough land for refugees to cultivate their own food, the nearest mature markets are at least 20 kilometers away and the current harvests have been low.

- Therefore, mix of in-kind food and gradual scale-up of cash transfer would be ideal.
- And the situation re-assessed in 4 months' time.

## Annex: Key Findings by Zone

### Zone 1 (Bidi-Bidi)

There were three markets identified in zone 1 but at different levels of growth. There was a market at the reception center but this had more of services including restaurants, saloons and other nonfood items. The second market in zone 1 is Arijua as you keep left off the road heading to Yumbe when leaving the reception center. The third upcoming market (just starting) is at the Base camp).

Market	Number of stalls, /shops	Type of structures	Activity level	Trading in staple foods (Beans & maize)/other food commodities
Reception Centre	Over 100 stalls dealing in a variety of business including services.	Make shift structured roofed with tarpaulins.	Business activity was very high with over 1000 customers daily more especially in restaurants, general mechanizes and transport.	Trading in raw food was very limited at the reception center. The common food commodities available in this market were sugar, salt and drinks. The maize grain, four and beans on market was mainly from food assistance as main source.
Arijua	About 50 stalls / shops.	Make shift structured roofed with tarpaulins.	Traders reported that the market is visited by about 200 customers on a daily basis.	About 20 traders had maize grain and beans with stock ranging from 20Kg to 150Kg for maize grain and 10kg – 30kg for beans. The source was still food assistance given to refugees. Other commodities on market included,

				rice, cassava flour, wheat, fresh cassava and potatoes, beef, fish, green vegetables, sugar, vegetable oil and salt. The fresh foods were mainly from locals/ nationals within Yumbe District and mostly traded by women.
Base Camp	Just beginning with 3 stalls open as of 23 <sup>rd</sup> November, 2016.			

### ***Zone 2 (Swinga)***

Also three markets were identified in Zone 2 (Swinga) but interviews were only conducted in the main market (Agua Market). The second market was between block 1 and 2 within zone 2 and no name was provided for this specific market.

<b>Market</b>	<b>Number of stalls, /shops</b>	<b>Type of structures</b>	<b>Activity level</b>	<b>Trading in staple foods (Beans &amp; maize)/other food commodities</b>
Swinga 2 (Agua Market)	Over 200 business in the market of which about 40% of the owners are female.  All business are less than 3 months old.  20% of the traders were refugees (men) and these were	Make shift structured roofed with tarpaulins.	The market is open every day with over 1000 customers. Most demanded commodities on the market include sugar, green vegetables, cassava and potatoes.  The main source for	About 10 traders had maize grain and beans with average stock of 30kg and 10Kg respectively. The main food commodities on market were, sugar, greens, cassava (flour & tubers), sweet potatoes and fish. Similar to other zones, food aid was the



	mainly involved in general mechanize e.g soap, sugar, coffee, tea and other processed items.		mechanize was Yumbe, Koboko and Arua Towns.	main source of beans and maize while tubers were from the locals/ nationals and mostly women involved in the trade.
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### **Zone 3 (Yoyo)**

Three upcoming markets were identified in Zone 3 (Yoyo) but the prominent one being Kigo where trader interviews were conducted.

<b>Market</b>	<b>Number of stalls, /shops</b>	<b>Type of structures</b>	<b>Activity level</b>	<b>Trading in staple foods (Beans &amp; maize)/other food commodities</b>
Yoyo 1 (Kigo Market)	The market has about 80 traders with small businesses.	Make shift structures majority without roofs (open stands)	Close to 200 people come to the market every day. The market is about 3 months old of which 70% of the traders are female mainly involved in selling food commodities at a small scale e.g sweet potatoes, cassava flour/tubers, fish and greens.	On the day of the assessment 8 traders had maize flour, grain and beans. Average stock for beans was 10kg and maize grain 30kg. Other food commodities on market were similar to other markets and these included, sugar, greens, cassava (flour & tubers), sweet potatoes and fish. The fresh foods were brought to the market by the locals/nationals from their farms around Yumbe.

#### **Zone 4 (Odravo/Abirimajo)**

One upcoming market was identified at Abirimajo in Zone 4.

<b>Market</b>	<b>Number of stalls, /shops</b>	<b>Type of structures</b>	<b>Activity level</b>	<b>Trading in staple foods (Beans &amp; maize)/other food commodities</b>
Abirimajo Market	At the time of the visit on 23 <sup>rd</sup> November, the market had about 40 traders operating small stalls.	Make shift structures majority without roofs (open stands)	The market is just developing with close to 100 participants (including traders and potential customers) during the time of the visit.  90 o% of traders in this market were females selling fresh foods and fruits.	3 traders had beans, maize flour /grain and 4 women selling fresh potatoes, cassava, fish and vegetables. Other traders were selling general mechanize including nonfood items. Traders indicated that the fresh food are from the nationals while majority of the cereals and beans were from WFP food aid. A few cereals and beans were bought by traders from Yumbe, Koboko and Arua together will all other nonfood items.

***Price of food commodities available in different zones of Bidi-Bidi settlement***

<b>N</b>	<b>Commodity</b>	<b>Zone 1 Arijua Market</b>	<b>Zone 2 Swinga 2 Market</b>	<b>Zone 3 Yoyo 1 Kigo Market</b>	<b>Zone 4 Abirimajo Market</b>	<b>Bidi-Bidi average Price</b>
1	Maize grain (kg)	1,000	1,000	600	1,000	<b>900</b>
2	Maize flour (kg)	1,500	2,000	1,000	1,000	<b>1,375</b>
3	Rice (Super) (kg)	3,500				<b>3,500</b>
4	Rice (Pakistan) (kg)	3,600	4,000			<b>3,800</b>
5	Rice (Kaiso) (kg)	3,000		3,200	3,200	<b>3,133</b>
6	Wheat flour (kg)	3,000	3,000	2,500		<b>2,833</b>
7	Cassava flour (kg)	1,300	1,300	1,400		<b>1,333</b>
8	Cassava-fresh (hip 6 small pieces)	1,000	1,000	1,000	1,000	<b>1,000</b>
9	Bananas					
10	Sweet potatoes (hip small 8 pieces)	1,000	1,000	1,000	1,000	<b>1,000</b>
11	Beans (Nambale – red with spots)-(kg)	2,800	3,000			<b>2,900</b>
12	Beans (Agwede)-(kg)			2,000	2,000	<b>2,000</b>
13	Beans (Yellow)- (kg)					
14	Peas - (kg)			3,000		<b>3,000</b>
15	Vegetables (green leaves)-(hip)	100	100			<b>100</b>
16	Vegetables (Sukuma wiki)-(hip)			200		<b>200</b>
17	Vegetables (small cabagge)			800		<b>800</b>
18	Irish Potatoes - (hip 6 pieces)	2,000				<b>2,000</b>
19	Beef -(kg)	9,000	9,000	8,000		<b>8,667</b>
20	Fish -5 medium pieces/ 1 big	6,000	8,000	6,000		<b>6,667</b>
21	Chicken - big	25,000	25,000	25,000		<b>25,000</b>
22	Cooking Oil -llitre	6,000	6,000	6,000	6,000	<b>6,000</b>
23	Sugar -(kg)	4,000	4,000	4,200	4,000	<b>4,050</b>
24	Millet Flour - (kg)					
25	CSB (kg)				1,000	<b>1,000</b>
26	Salt )kg)	1,200	1,200	1,400		<b>1,267</b>
27	Sorghum		1,000	1,200	1,200	<b>1,133</b>



**JULY 2017**

## **MARKET ASSESSMENT REPORT KIRYANDONGO, RHINO CAMP AND ADJUMANI SETTLEMENTS**

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*Administering a trader survey Adjumani main Market*



*Food stocks in one of the shops at Nyumanzi Market*

**ANALYSIS  
CONDUCTED BY:**

**AME**

**(Analysis Monitoring  
& Evaluation)**

**WFP Uganda**

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## Introduction:

WFP provides food assistance to vulnerable refugees in Uganda through a combination of in-kind food and cash based transfers. Beneficiaries not only enjoy the flexibility of buying food of their preference as a result of the cash based transfers but also the timeliness, dignity and efficiency associated with cash based transfers (as noted in a number of studies).

WFP ensures that feasibility studies are conducted to ascertain if markets are functional and can support cash based transfers with no impact on local food prices, intra-household dynamics, host-refugee relations and other socio-economic factors. In addition WFP collects monthly price data across key markets in settlements where cash based transfers are implemented to monitor the WFP cash transfer value in relation to the market value of an in-kind food basket.

In addition to the price and refugee market monitoring system, it is clear that detailed information on other key components like market systems and structure, demand and supply, market conduct and response capacity is also necessary. This information is critical to support decision making related to the implementation of cash based transfers. Therefore, the AME Unit supported by Programme and Supply Chain began to conduct detailed market assessments across all settlements since June 2017.

Three settlements were visited during the first round of the planned market assessments and these include, Kiryandongo, Rhino camp and Adjumani/Pakelle.

### *Methodology and data collection:*

A one day training was conducted in Gulu on 5th June 2017 attended by WFP staff from Kampala, Arua and Gulu Offices. In total 16 staff were trained including Programme and Logistics and Supply chain staff. Tools were reviewed and adjusted with input from field staff.

The data was collected through structured interviews with key informants including traders, market chairpersons, local leaders and OPM staff (RDO). In addition a Market Observation Checklist was also used to collect price data on available food commodities.

The trader survey was programmed using ODK and data collected using tablets while the key informant and market observation checklists were printed on paper.

## KIRYANDONGO SETTLEMENT

Data collection in Kiryandongo was conducted on 6th June 2017 around Bweyale and Mulokoni markets. A total of 13 traders were interviewed across the two markets.

### *Summary of Findings, Conclusion and Recommendations:*

#### **Market structure and conduct**

- Two markets were visited in Kiryandongo settlement i.e. Bweyale and Mulokoni markets. Both markets are easily accessed by refugees with Bweyale being the main market with 66 stalls and over 600 traders operating including refugees. The markets are open throughout with each trader attending to an average of over 100 customers a week. Therefore, on average Bweyale services approximately 60,000 customers a week; underlining the access to market by both the refugees and host populations. The refugee influx has increased demand for food and nonfood items attracting more traders in the area.
- A variety of food commodities are sold in the markets including fresh and dried foods. Some food commodities such as maize, potatoes, cassava and vegetables are obtained from within the refugees and host community while others for example, rice and vegetable oil are brought by traders from other districts.
- There are laws and regulations implemented by the committee that govern the market and apply to each trader that intends to operate his/her business in the market. Traders who are not registered under Bweyale vendors association are not allowed to directly sell to final consumers in the market, but can sell to retailers.
- Micro-finance institutions are available and accessible by the traders and also final consumers can access goods on credit depending on the interaction and trust they have with the traders.
- Food assistance is a major source of livelihood for the refugees. Some refugee sell in-kind food in order to get money to buy either their preferred food or to meet other household needs such as health expenses.



### ***Market prices, purchasing power and response capacity***

- Majority of the traders interviewed expect prices of key food commodities to increase in the next 3-6 months because the cropping season did not perform as anticipated due to the armyworm and dry spell.
- Some of the constraints to response capacity include, supply problems, high transport costs, petty theft, outbreak of army worm and taxes. However, almost all traders around Bweyale market have storage facilities and 54% reported having capacity to respond within a month in case demand doubled. Only 31% of the traders reported not having the capacity to respond to increased demand due to lack of enough capital and hardship in finding food commodities at times. Therefore, storage capacity and ability to respond are not limiting factors for markets in Kiryandongo.
- Sixty-two percent (62%) of the traders interviewed did not report any safety or security related incidences. A few cases reported were related to robbery at the shop/stall but enhanced deployment of security personnel/police can stop the vice.

### ***Conclusion***

In summary, the following are the key findings for markets in Kiryandongo settlement.

- Markets are relatively mature and well established. For example the primary market, Bweyale, sees approximately 60,000 customers per week.
- Nearly 90% of the traders began their businesses more than a year ago.
- Almost all traders reported that their businesses are open between 5-7 days a week.
- There is ongoing and continuous increase of traders.
- Markets are governed by several laws and regulations but not limiting entry and exit.
- Micro finance institutions have been established (accessible to both traders, refugee and host populations).

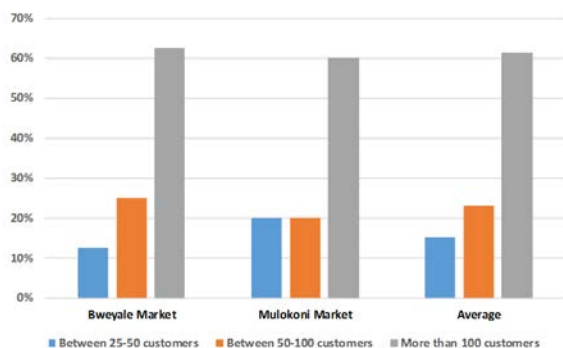
Therefore, cash expansion can be done gradually with constant monitoring of the markets and the harvest season. However, also security measures need to be taken into account.

## Market Structure

### Market Characteristics

#### Bweyale Market

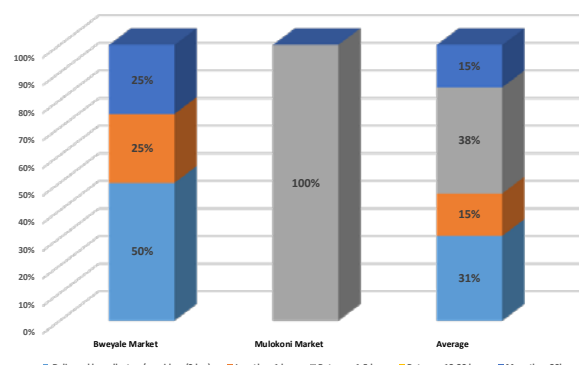
- Located along Gulu High Way with both permanent structures and makeshifts.
- It is the main market accessed by refugees, with 66 stalls and over 600 traders operating including refugees.
- There are about 50 retailers and 40 wholesalers for both maize grain and beans. Retailers are within the market, but wholesalers operate in shops along the main road.
- Majority (88%) of the traders started their businesses more than a year ago.
- All traders indicated that their businesses are open 5-7 days a week.
- Bweyale and Mulokoni markets are busy with majority of the traders able to attend to an average of more than 100 customers a week.



Average number of customers served in a week

### Commodity flow

- A variety of food commodities are sold around the market including fresh and dried foods (see price list attached).
- **Due to the Refugee influx, the number of traders has increased significantly, resulting from increasing demand for food and other NFIs**
- The 2016 dry spell resulted to below normal harvest, attracting more traders from other regions and districts, including Kampala. External traders transport commodities from other areas and sell them to retailers in the market.
- Importation of food from other areas/regions has contributed to the continuing price increase for every commodity in the market.
- Major food commodities (maize grain, flour, beans and vegetable oil) sold in Bweyale market are purchased from farmers and traders outside the settlement.



Distance covered by traders from source of supplies

- 50% of the traders in Bweyale market reported that they purchase most of their stocks from traders who bring goods to the market while 25% travel less than a kilometer. 25% of the traders travel more than 30Km to replenish their stocks.
- All commodities sold in Mulokoni market purchased from Bweyale market and other sources within a short distance of 1-5km.
- However, 20% of the traders in Mulokoni market confirmed purchasing their maize grain and beans they had in stock from the food aid provided to households in the settlement.

## Market Conduct

### Market Regulations and Policies

- Several laws and regulations in existence, “these applies to each trader that intends to operate his/her business in the market, laws and regulations are read by the committee before anyone sets up his business to ensure that people understand them very well”
- Refugee traders present attestation cards to the market chairperson and committee before a stall is assigned;
- Traders are subjected to health checkups, a blood screening, aimed at mitigating disease outbreak and infections;
- Traders from neighboring regions/districts are not allowed to directly sell to consumers in the market, but sell to retailers.

### Credit availability and access

- Micro-finance institutions are available and accessible by the traders. For example Post-Bank and SACCOs (Nyakadot Market Vender SACCO). Preferably land titles are presented as collateral to access loans. Banks also assess traders’ stocks in shops before they give them loans and are advised to make deposits every month to enable the bank recover their money.
- 38% of the traders interviewed in Bweyale and 80% in Mulokini markets indicated that they offer commodities to consumers on credit. The payback period ranges from one week to four weeks in Bweyale and to a maximum of two months in Mulokoni. *“We as traders agree with a consumer on when he/she intends to pay, usually it is for one week but for exceptional cases, we accept a two week period or beyond. Sometimes, we set conditions for consumers especially if payment is not made within the agreed timeline, we charge interest”*

### Perceived Impact of Food Assistance on Markets

- Refugees selling food (maize flour and Vegetable oil) to traders *“Initially, mostly when refugees were receiving food, they could sell to traders in the market and also Nationals, and earnings could be spent to buy commodities of their interest, refugees love meat a lot.” “since these commodities (vegetable oil) was very cheap, we earned a lot of profits after selling”*
- Increased sales due to the cash transfer, *“a good number of refugees come to purchase commodities once they receive their cash, they buy in bulk and this is good for us traders”*

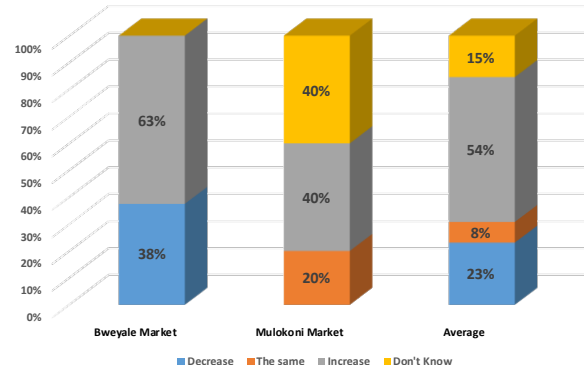
## Market Prices and Purchasing Power

### Transaction Costs

- There are 5 key transaction costs involved in operating business in Bweyale market. These include;
  - Daily receipt fees;
  - Annual payments for stalls;
  - Transport costs;
  - Medical fees for new traders;
  - Trading license

### Prices Prospects

- There has been a continuous increase in the prices for commodities since the start of 2017;
- Majority (54%) of the traders interviewed around Kiryandongo settlement expect prices for key food commodities to increase in the next 3-6 months as indicated below.



#### Trader Perception on future price changes

- This year's harvest is expected to be lower than anticipated due to the dry spell and outbreak of Army Worms, therefore, a price decrease might not be realized or it could be minor.
- Normally a price decrease for maize grain is expected in July, during and after the harvest. *"It all depends on crop performance, beans might do well and its price decreases and maize might be lower, and its prices either remains stable or increases significantly, let's wait and see!"* respondent.

Commodity	Price	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Maize	High												
	Low												
Beans	High												
	Low												
Sorghum	High												
	Low												

**Period when prices are expected to be high normally**

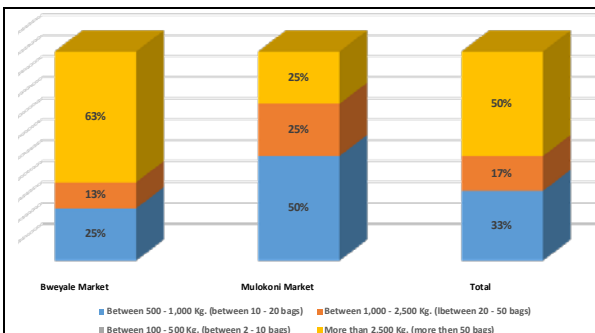
## Market Response capacity

### Capacity to supply food timely

- All traders in Bweyale market reported to have storage facilities while 80% of the traders around Mulokoni market had. Those with storage facilities the capacity varied as indicated below.
- Majority of the storage facilities have the capacity to store between 1MT to more than 2.5MT.

### Major Constraints

- The major challenge reported by traders in Bweyale market are; too many sellers in the market (50%); supply problems (25%) and few customers (13%). In Mulokoni market the major problems reported by traders include, few customers (20%) and many customers buying on credit (20%).
- Other constraint reported by key informants include;
- High transportation costs, *"some of the traders in the market are farmers, they transport produce from their farms for sale in the market, and they incur high transport costs. We don't know what's happening these days, transporting are charging us highly?"* a key informant narrated.



#### ***Proportion of traders with different storage capacity***

- 31% of the traders in Bweyale and Mulokoni indicated that they did not have capacity to increase supply in case their customers doubled mainly due to lack of capital/credit (38%) and commodities hard to find (23%) and others.
- 31% of the traders have the capacity to respond to a double increase in demand within a week, 8% within 2 weeks, 15% within a month and 15% after one month.

- Outbreak of Army worm, “it is now more than one year, since January 2016. These worms are destroying our gardens, especially maize and all farmers have been affected.” “we will wait and see, but we hope we harvest enough, we are worried”
- Petty theft, one security guard manages the whole market;
- Inadequate stalls, majority of the traders operating in the open, under the sun;
- High taxes for everyone including Refugees

#### **Safety and Security**

- 75% of the traders interviewed in Bweyale market did not face any safety or security related incidences compared to 40% in Mulokoni market.
- The other traders who faced safety or security related incidences were more related to robbery with violence at the shop/stall and while going to or coming from shop/stall.
- Possible solutions proposed by traders include deployment of additional security personnel especially at night, provision of light and alarms.

*Kiryandongo Settlement Price Data 6th June 2017*

Commodity		units	Bweyale1 price	Bweyale2 price	Mulokoni price	Average price
1	Maize grain	kg	2,000	2,000	2,000	2,000
2	Maize flour	kg	2,867	2,867	3,000	2,911
3	Rice (Super)	kg	4,333	4,000	4,533	4,289
4	Rice (Pakistan)	kg	4,333	4,267		4,300
5	Wheat flour	kg	2,750	2,750	2,917	2,806
6	Cassava flour	kg	2,600	2,000	2,000	2,200
7	Cassava-fresh	heap	1,333	1,000	1,000	1,111
8	Bananas	bunch		25,667		25,667
9	Sweet potatoes	heap	2,000	2,000		2,000
10	Beans (Nambale – red with spots)	kg	3,000	3,000	3,000	3,000
11	Beans (Agwede)	kg	3,000	3,000		3,000
12	Beans (Yellow)	kg	3,000	3,000		3,000
13	Peas	kg	3,000	3,000		3,000
14	Vegetables (green leaves)	bundle	100	100	200	133
15	Irish Potatoes	kg	2,000	2,000	10,000	4,667
16	Beef	kg	10,000	10,000	8,000	9,333
17	Fish	kg	10,000	8,000		9,000
18	Chicken	hen/cock	21,000	20,000	6,667	15,889
19	Cooking Oil	litre	6,000	6,000	6,000	6,000
20	Sugar	kg	5,500	5,500	4,000	5,000
21	Millet Flour	kg	5,000		4,500	4,750

## RHINOCAMP SETTLEMENT

Data collection in Rhino Camp was conducted on 7th June 2017 around Ofua3, Matangatia and Ocea markets. A total of 9 traders were interviewed in Ofua3 and Ocea markets.

### *Summary of Findings, Conclusion and Recommendations:*

#### **Market structure and conduct**

- Ofua3 and Ocea markets operate daily while Matangatia market is functional only one day a week (Tuesday). Most of the traders are retailers with only two wholesalers in Ofua3 market. Approximately 80 traders operate in Ocea market and about 25 retailers in Ofua3 with several vendors. On average each trader in Ocea market serves about 100 customers in a week while a trader in Ofua3 serves about 50 customers.
- Common commodities sold included beans, cassava flour, fresh cassava tubers, Silver fish (Mukene), vegetable oil, maize flour, tomatoes, egg plants and other green vegetables.
- One of the key sources for the traders selling maize grain, beans and vegetable oil was food aid and any pipeline breaks lead to shortage on the market. This is in contrast to what was observed in markets in other settlements where the main source of traders' products come from production or stock up goods which they bring into the settlement. For other sources, traders have to travel over 30km to get supplies incurring transport of UGX 20,000 which is transferred to the final consumer.
- There are no major restriction that hinder business start-up. However, traders pay market dues/fee to operate which are affordable depending on the size of your business.
- Customers around Ofua3 and Ocea markets have access to acquiring goods on credit but have to pay back within 2 weeks. Customers around Matangatia market have no access to credit since the market is functional once a week.
- Traders in Ocea Market have a saving scheme from which they can access small scale credit services which is not the case for Ofua3 traders with no access at all.

### ***Market prices, purchasing power and response capacity***

- Majority of the traders interviewed expected prices for beans and maize grain to continue increasing due to drought and limited supplies.
- Traders in Ofua3 market did not have storage facilities and majority (80%) did not have capacity to respond in case of increased demand. 75% of the traders in Ocea market had storage facilities limited to 1MT maximum and indicated that they are able to respond in case of increased demand. However, limited capital, low purchasing power and transport challenges are considered as common barriers among traders.
- No major safety or security related incidences were reported by traders around Rhino camp other than the sanitation induced incidences around Ocea market. Therefore, if all markets had toilet facilities, then no single safety or security related incidence would be recorded.

### ***Conclusion and Recommendation***

- Rhino camp is located in an isolated area with poor soils and weather affecting agricultural livelihood activities and food supply. The markets that exist are functional but to a small scale and are composed of few traders with limited capital, poor road network and high transport costs to food surplus areas.
- Therefore, cash transfers should be limited in Rhino Camp settlement as in-kind food assistance is a major source of livelihood for refugees and supply of food to the markets.
- There is need to advocate for construction of sanitary facilities in all market places around the settlement.



## Market Structure

### Market Characteristics

#### Ocea Market

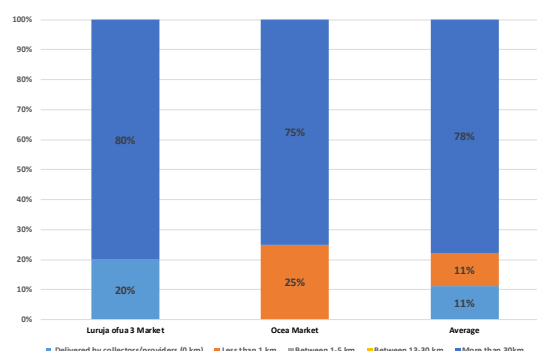
- Ocea market is located within the Rhino camp refugee settlement. The market comprises of only retailers and several vendors (women) selling vegetables, fish and other food items. There are no wholesale traders in this market.
- Total number traders approximately 80 from which at least 30 sell vegetables and food stuffs.
- It was established that supplies to this market are got from Arua by the traders, a distance where the cost of transport (to & fro) is UGX 20,000 and 10,000 per person using taxis and open trucks respectively as modes of transport.
- The cost of transport is transferred to the commodity prices paid by the final consumer.
- For leverage, traders purchase merchandise from Arua through consortia, where one or two traders purchase a bulky of goods from Arua on behalf of others.
- With exception of the vegetable stalls which are temporary make shifts, most of the retail shops are both semi and fully permanent.
- Activity levels- During the visit, Ocea market was very busy with people buying groceries, clothes and food from restaurants.
- **There were no wholesalers traders for beans and Maize grain. These food commodities were entirely sold on retail basis.**

#### Matangatia Market

- The market is located within the Rhino camp refugee settlement area.
- Activity level; the market is held once a week on Tuesdays only.
- However a few (less than 10) sellers dealing in silverfish, onions and tomatoes display limited stocks throughout the week.
- Retailer shops mainly open on Tuesdays only. No wholesaler traders.
- On atypical market day, it was indicated that 50-

### Commodity flow

- Common commodities sold included beans, cassava flour, fresh cassava tubers, Silver fish (Mukene), vegetable oil, maize flour, tomatoes, egg plants and other green vegetables.
- To note, maize flour is mainly consumed/ purchased by the host community.
- 25% of the maize, beans and vegetable oil retail traders in Ocea market indicated that they purchased these items from local traders while 50% said that they purchased them from food aid offered to households within the settlement.
- Similarly 20% of the traders in Ofua market said they bought their maize grain and beans stocks from food aid beneficiaries while 60% got vegetable oil from the same source.
- 40% of the traders purchase their maize flour stocks from traders outside the settlement.



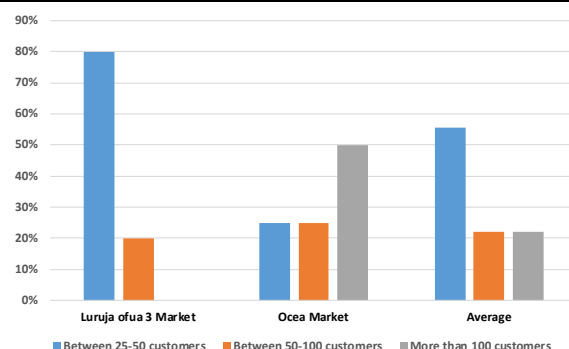
- Majority of the traders in Ofua3 and Ocea markets travel over 30Km to get stocks. Only 20% of the retail traders in Ofua3 market reported purchasing some of the goods delivered by other traders to the market.
- The two markets are not too vibrant. It was in Ocea where about 50% of the traders reported selling to over 100 customers in a week. In Ofua3 markets 80% of the traders reported to attending to customers ranging 20 to 50 in a week.

70 traders dealing in different merchandise show up.

- Traders from Arua, Adjumani, Gulu and Kampala are said to come for business on Tuesdays.
- Customers have adapted to purchasing of household consumables including foodstuff on this day.
- Retail shops of permanent built and the observation is that traders coming from Arua, Adjumani, Gulu or Kampala hire these facilities a day before so that they can position their goods on the market day.
- There were no wholesalers traders for beans and Maize. These food commodities were entirely sold on retail basis.

### **Ofua 3 Market**

- The market is located within the refugee settlement. The market comprises of two wholesalers and more than 25 retailers and several vendors (women) selling vegetables, fish and other food items.
- It was established that supplies to this market are got from Arua by the traders, a distance where the cost of transport (to & fro) is UGX 20,000 per person.
- The cost of transport is transferred to the commodity prices paid by the final consumer.
- With exception of the vegetable stalls which are temporary make shifts, most of the retail and wholesale shops are of semi-permanently built.
- Activity levels- During the visit, Ofia3 market was fairly busy with people buying groceries.
- There were no wholesalers traders for beans and Maize. These food commodities were entirely sold on retail basis.



## ***Market Conduct***

### **Market Regulations and Policies**

#### **General**

- No restrictions for business startup in all markets though traders have to pay market dues/fees to

### **Credit availability and access**

- Traders have formed a savings scheme in Ocea market from which credit can be accessed by the members.
- However, in Ofua3 there was no credit services

<p>operate.</p> <p><u><b>Ocea market</b></u></p> <ul style="list-style-type: none"><li>Fees of UGX 200-500 per day collected from traders basing on the size of their businesses.</li><li>Stalls are acquired at a fee of UGX 15,000 and 5,000 for the semi-permanent and makeshift stalls respectively. It was reported that these fees are not a hindrance for business startup.</li></ul> <p><u><b>Ofua 3 market</b></u></p> <ul style="list-style-type: none"><li>Fees of UGX 3,000-5,000 per month collected from established traders (retailers/wholesalers). However this is not enforceable. This collection aims at raising 300,000 payable as market dues to the local sub-county authority.</li></ul>	<p>accessible to the traders. It was highlighted that traders are also in process of forming a savings scheme from which credit will be potentially accessed.</p> <ul style="list-style-type: none"><li>60% of the traders in Ofua3 and 50% in Ocea confirmed offering credit to customers but having to pay back within one to two weeks.</li><li>The beneficiaries (customers) around Matangatia market have challenge of acquiring goods on credit from the traders- since there is no close interface of traders and customers given the fact that market operates only once a week.</li><li>Barter trade is widely practiced, where a customer obtains goods from a retailer in exchange of maize grain or beans, CSB or Vegetable oil.</li></ul>												
<p><b>Perceived Impact of Food Assistance on Markets</b></p> <ul style="list-style-type: none"><li>In Ofua 3 market, beneficiaries demonstrated preference of yellow beans (cook faster) to the mixed beans given by WFP. In this regard, beneficiaries sell the mixed beans for less, top up and buy the yellow beans or trade 1.5kg of mixed beans for 1 Kg of yellow beans.</li></ul>													
<p><b>Market Prices and Purchasing Power</b></p>													
<p><b>Transaction Costs</b></p> <ul style="list-style-type: none"><li>Market dues</li><li>Rent</li><li>Transport costs</li></ul>	<p><b>Prices Prospects</b></p> <ul style="list-style-type: none"><li>67% of the traders interviewed expected prices for beans and maize grain to continue increasing due to drought and reduced food assistance while 33% didn't know what prices will be in 3-6 months.</li></ul> <div><table><tr><th>Category</th><th>Increase (%)</th><th>Don't Know (%)</th></tr><tr><td>Lurija ofua 3 Market</td><td>60%</td><td>40%</td></tr><tr><td>Ocea Market</td><td>75%</td><td>25%</td></tr><tr><td>Average</td><td>67%</td><td>33%</td></tr></table></div> <p><b>Trader Perception on future price changes</b></p>	Category	Increase (%)	Don't Know (%)	Lurija ofua 3 Market	60%	40%	Ocea Market	75%	25%	Average	67%	33%
Category	Increase (%)	Don't Know (%)											
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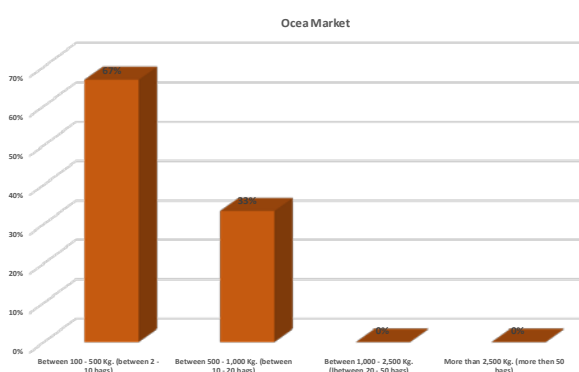
Commodity	Price	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Maize	High												
	Low												
Beans	High												
	Low												
Sorghum	High												
	Low												

*Period when prices are expected to be high normally*

## Market Response capacity

### Capacity to supply food timely

- In Ofua3 market traders did not have any storage facility except the stalls they were operating. In Ocea 75% of the traders had storage facilities but still limited up to a maximum of 1MT as shown below.



*Proportion of traders with different storage capacity*

- 80% of the traders in Ofua3 and 25% in Ocea markets said that they did not have the capacity to respond in case demand doubled. However, the few that said to have the capacity to respond indicated that they could do so within one to two weeks maximum.
- Local traders around Matangatia market lack capital to supply food daily on the market. However, the traders from Arua and other districts have the capacity to supply food in case of an increase in demand and purchasing power.

### Major constraints

- The major constraints to respond in case of increased demand was lack of capital/credit in Ofua3 (80%) and Ocea (100%) markets; lack of storage facilities mentioned by 20% of the traders in Ofua3 market; lack of customers and supply problems.
- High transport cost from Arua to Ocea and Matangatia market is a challenge to fast replenishment of stocks. Commodity prices are fairly higher due to transport costs.
- It was reported that all fresh vegetables and supplies are from Arua. These supplies are not readily available from the host community. This is attributed to the poor soils and harsh weather conditions that do not favor crop production in the area.

### Safety and Security

- No safety or security related incidences were reported by traders in Ofua3 market. However, 25% of the traders in Ocea market reported safety or security incidences related to physical beating as a result of going to the bush to ease themselves due to lack of toilet facilities at the market place.
- Traders proposed that sanitary facilities be constructed at all market places.

*Rhino Camp Settlement Price Data 6th June 2017*

Commodity		units	Ocea price	Matangatia price	Ofua3 price	Average price
1	Maize grain	kg	2,000		1,800	1,900
2	Maize flour	kg	2,000	2,100	2,000	2,033
3	Rice (Pakistan)	kg	4,250	4,000	4,000	4,083
4	Rice (Kaiso)	kg	4,000			4,000
5	Wheat flour	kg	2,750	3,000	2,750	2,833
6	Cassava flour	kg	1,500	1,600	2,000	1,700
7	Cassava-fresh	heap	2,000		2,000	2,000
8	Sweet potatoes	heap		2,000		2,000
9	Beans (Nambale – red with spots)	kg	2,800			2,800
10	Beans (Agwede)	kg	2,750		2,700	2,725
11	Beans (Yellow)	kg		4,500		4,500
12	Peas	kg			2,000	2,000
13	Vegetables (green leaves)	bundle	3,000		1,000	2,000
14	Vegetables (Onions)	heap	3,500			3,500
15	Irish Potatoes	kg			1,000	1,000
16	Beef	kg	10,000	10,000	9,000	9,667
17	Fish	kg	10,000	7,000	20,000	12,333
18	Chicken	hen/cock	20,000		5,000	12,500
19	Cooking Oil	litre	6,000	6,000	4,167	5,389
20	Sugar	kg	5,000	5,000	1,500	3,833
21	Millet Flour	kg	2,000		4,500	3,250

## ADJUMANI/PAKELLE SETTLEMENT

Data collection in Adjumani/Pakelle was conducted on 8th June 2017 around Nyumanzi, Awindiri and Adjumani main markets. A total of 12 traders were interviewed in the three markets.

### *Summary of Findings, Conclusion and Recommendations:*

#### **Market structure and conduct**

- The three markets (Awindiri, Nyumanzi and Adjumani main market) are fully functional with more than 100 traders in each market. In Nyumanzi, more than 2,000 customers access the market daily.
- Common food commodities sold included maize, beans, cassava flour, sorghum, fresh cassava tubers, Silver fish (Mukene), vegetable oil, tomatoes, rice, Irish potatoes and other green vegetables.
- The volumes of food stuffs have reportedly increased across the settlement markets as traders from other districts like Gulu, Kiryandongo and Arua have embraced the region. There was good rice on the market in Adjumani from Sudan that was cheaper than similar rice in Kampala and other areas.
- There are no major restrictions that hinder business start-up in all markets except a few by-laws traders have to follow and market dues/fee that have to be paid in order to operate your business.
- Majority of the traders in all markets offer good on credit to some of their customers and the payback period ranges from one to four weeks maximum. Also traders have access to financial services through saving and credit companies i.e. SACCOs, Centenary bank and Lutheran Worldwide Federation (LWF) in Nyumanzi.
- Traders reported that food assistance plays an important role in boosting household purchasing power. When refugees receive food assistance, they use extra income to buy other goods and services such as sugar, shoes, medical treatment etc.

#### **Market prices, purchasing power and response capacity**

- In all markets traders mentioned about transaction costs like transport costs, loading/offloading, licenses, market dues/fees and for some traders rent which

they incorporate in setting prices. Traders expected prices for sorghum and maize to go down in the next three months due to the expected harvest. Some traders indicated that the decrease is likely to be temporary as the harvest won't be good due to drought and the armyworm.

- Majority of the traders in all markets around Adjumani/Pakelle settlement have storage facilities that can handle over 2.5MT and capacity to respond in case demand doubled. Trader in Adjumani main market and Nyumanzi said that they would be able to respond to the increase in demand within one week. 75% of the Traders in Awindiri market would be able to respond within one week.
- No major safety or security related incidences were reported by traders in Adjuman market. However, cases of robbery without violence were reported in Awindiri and Nyumanzi markets especially at night due to makeshift structures.

### ***Conclusion and Recommendation***

- In summary, the markets around Adjumani/Pakelle settlement are functional with over 100 established traders/businesses in each market and operational daily.
- Food was available by the time of the assessment and some commodities like rice and beans were cheaper than in other areas of the country.
- Traders have storage facilities and capacity to respond in time in case of increased demand.
- Traders have access to credit that can boost their working capital in case of increased demand.
- Most of the refugee who receive in-kind food sell part to get money to diversify their food preferences.
- Therefore, cash based transfer expansion is feasible in Adjumani/Pakelle settlement more especially for beneficiaries close to Awindiri, Nyumanzi and Adjumani main market. However, there is need to improve on the security in Awindiri and Nyumanzi markets.

## Market Structure

### Market Characteristics

#### Adjumani Main Market

- The market is accessed by some few refugees from the settlements. Some traders from the market take food commodities nearer to the refugees in the settlements. However, majority of the refugees prefer to buy from Awindiri market which is cheaper.
- There are approximately more than 50 stalls/shops and 4 main stores in the market.
- The type of market infrastructure: There are about 20 temporary make shift structures; and 170 permanent structures in the market.
- The market was very busy during the visit. The market is very busy in the very early mornings and evening hours. During the day there are very few traders and customers in the market. Awindiri market always pulls away most of the customers.
- There are no food commodity whole sellers in the market. The whole sellers come with their trucks; and sell food commodities directly from their trucks to retailers and leave the market.
- There were 15 traders selling beans and maize grain.

#### Awindiri Market

- The market is accessed majorly by nationals from the host communities/Adjumani Town Council and refugees from the settlements.
- There are approximately 50 main stalls in the market. Majority of traders use tables and / or sell their commodities in an open/ on the ground (in the market).
- The type of market infrastructure: Majority of the stalls are temporary make shift structures.
- Activity levels on the market during the visit: The market was very busy during the visit. Some traders are retailers who buy in bulk and go to their respective areas and resale the commodities in small quantities. Generally, prices of food commodities are lower compared

### Commodity flow

#### Adjumani Main Market

- Five major food commodities sold around the market were beans, rice, green vegetables, Irish potatoes and fish.
- The volume of sales are reported to have reduced in the main market.
- Food commodities prices reduced in June.
- High food prices were experienced during the month of May (and the period before May).
- Most refugees now prefer to buy food commodities in the markets near or within the refugees' settlements. Some traders have reported taking food commodities for sale in the refugees' settlements.
- Maize flour, beans and vegetable oil are purchased from traders outside the settlement.

#### Awindiri Market

- Major food commodities in Awindiri market include; maize grain and flour, beans, rice, sorghum, green vegetables, potatoes, cassava and fish.
- The volume of sales has increased including traders bringing food commodities from as far as Gulu, Bweyale in Kiryandongo, and rice from South Sudan etc.
- Also market traders buy food commodities from local food basket villages/parishes/ sub counties within the district e.g. Apa and this has resulted into increased food supply in Awindiri market.
- However, most of the maize grain, maize flour, beans and vegetables are bought from traders outside the settlement.

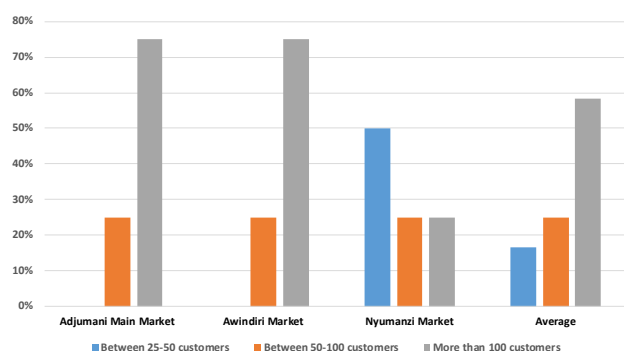


to other markets in Adjumani according to the respondents.

- The market has about 100 maize grain and beans retailers. Also there were 3 maize grain and 4 beans whole sellers in the market. Some whole sellers do not own stores; but sell directly from their trucks/vehicles to customers.

#### **Nyumanzi Market**

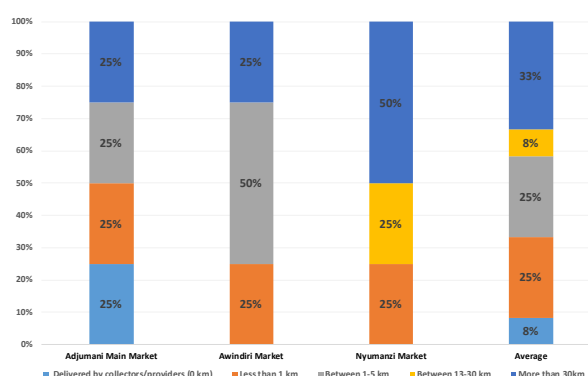
- One side of the market is located in the settlement and the other in host communities. The market is accessed by refugees from the settlement; and some nationals from the host communities.
  - There are approximately 500 private stalls in the market. Majority of the stalls are temporary with only about 5 permanent structures and 50 semi – permanent joint shops.
  - The market was very busy during the visit. On average approximately 2000 persons access the market daily.
- Adjumani main market and Awindiri being main markets in the district, traders attend to over 100 customers on average weekly. Traders in Nyumanzi indicated that they get high numbers of customers during the cash distribution week and then the number gradually goes down. Traders usually know about the cash distribution dates in advance and restock to full capacity.



**Average number of customers served in a week**

#### **Nyumanzi Market**

- The major food commodities sold around the market were maize, beans, rice, sorghum, cooking oil and green vegetables.
- There were about 11 maize grains and 10 beans retailers.
- The volume of sales are reducing mainly due to low purchasing powers. It was reported that when the refugees had just arrived in the settlement from South Sudan in 2014, they had money and sales were high.
- Markets around Adjumani settlement have access to goods and food commodities from numerous sources as indicated in the figure above. However, Nyumanzi being a vibrant market attracts traders to move over 30km to get supplies.



**Distance covered by traders from source of supplies**

## **Market Conduct**

### **Market Regulations and Policies**

#### **Adjumani Main market**

- There are no restrictions on any person planning to enter the market as a trader so long as you have a place for selling your food commodities.

### **Credit availability and access**

#### **Adjumani Main market**

- 50% of the traders said they offer credit to some customers. The credit transactions are well recorded in books and the maximum payback

<ul style="list-style-type: none"> <li>• In addition to having space in the market, the potential trader is expected to ask for permission or inform the market management/committee.</li> <li>• No trader is allowed to sell outside the market in the trucks parking yard before 5.00 pm.</li> <li>• Quarrelling, fighting and theft are not allowed in the market. The culprits are fined at UGX 50,000 each when caught. If one is a culprit three times s/he is dismissed from the market with immediate effect.</li> <li>• Fees are levied according to the type of food commodity and quantity. For example green vegetable traders pay market dues of UGX 1,500 per container/basin while produce traders pay market dues/fees of UGX 4,000 per bag of food commodity to be sold in the market.</li> </ul> <p><b><u>Awindiri market</u></b></p> <ul style="list-style-type: none"> <li>• There is no restrictions on any person planning to start trading in the market.</li> <li>• Any person planning to join the traders in the market is required to report to the Landlord who charges the person accordingly.</li> <li>• The charge for those on the ground is UGX 500/= per day (UGX 300 for Landlord and UGX 200/= for Town Council); and a Stall is charged at UGX 10,000/= per month.</li> <li>• Quarrelling, fighting and theft are not accepted and those involved are heavily levied fines at UGX 50,000.</li> </ul> <p><b><u>Nyumanzi market</u></b></p> <ul style="list-style-type: none"> <li>• There is no restrictions on any person planning to start trading in the market.</li> <li>• The general by-laws of the market include, keeping the market clean and not over changing customers.</li> </ul>	<p>period is two weeks.</p> <ul style="list-style-type: none"> <li>• Traders also have access to financial services especial through SACCO (Adjumani TC SACCO) and few through Centenary bank. The Adjumani TC SACCO loan terms are fairer / cheaper than the Centenary bank credit facilities' terms.</li> </ul> <p><b><u>Awindiri market</u></b></p> <ul style="list-style-type: none"> <li>• 75% of the traders offer credit to customers but only those well known to them. Preferably the payback period is two weeks but on exceptional cases up to four weeks.</li> <li>• Majority of traders' access credit facilities mostly from SACCO (Town Council SACCO).</li> <li>• Very few traders' access credit facilities from commercial banks mainly CENTINERY Bank.</li> </ul> <p><b><u>Nyumanzi market</u></b></p> <ul style="list-style-type: none"> <li>• All traders interviewed said that they offer credit to customers but only those well known to them. Also the payback period is preferably two weeks but on exceptional cases up to four weeks.</li> <li>• Some trader groups that accessed credit loans from international NGO such as LWF. LWF provides loans to refugees and host communities trader groups (12 members in a group) for group trading.</li> </ul>
<p><b>Perceived Impact of Food Assistance on Markets</b></p>	

- There is no effects/impact of food aids on the market as the refugees settlements are far and outside the Adjumani Town Council.
- When refugees receive food aid, they bring some of the food to the market. They sell at a lesser price by UGX 500 - 1000. For example, refugees sell their beans at UGX 2000/= per kg (UGX 33,000/basin) to the traders who later re-sell at UGX 3000/= per kg (UGX 35,000/basin).
- When refugees receive food assistance, they use extra income to buy other goods and services such as sugar, shoes, medical treatment etc.
- In Nyumanzi, traders reported that after WFP in –kind food assistance (GFD), some traders are unable to sell their commodities mainly maize grains, beans and vegetable oils in the market. Sales of these commodities pick up when WFP food aid is consumed and completed.

## Market Prices and Purchasing Power

### Transaction Costs

#### Adjumani Main market

- Market dues UGX 4,000 per bag of food commodity.
- Off-loading is UGX 4,000 per bag.
- No transport costs incurred by traders as Wholesalers as far as Hoima bring their food commodities on trucks up to the market.

#### Awindiri market

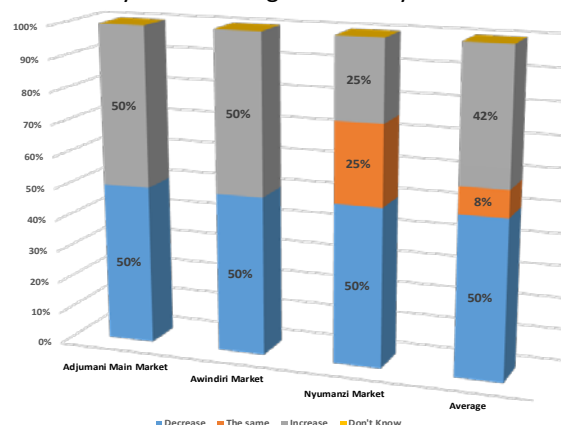
- Loading and off-loading labour for carrying 100 kg bag is UGX 1,000.
- Tax levied in the market UGX 500/day.

#### Awindiri market

- Loading and off-loading costs are included in the sale price of the commodity but at times traders offload by themselves.
- Taxes and transport costs
- Annual license of UGX 25,000 for established traders and daily market dues of UGX 1,000 for vendors.

### Prices Prospects

- Maize price is increasing and is currently being sold at UGX 1,800 per kg.
- Maize, sorghum and groundnuts prices will reduce starting from end of July to September during the harvest period.
- The figure below also highlights the traders' perception over prices for key food commodities in the next 3-6 months of which half say that prices will go down because of the expected harvest season. The rest of the traders who believe that prices will increase it's because of the poor crop performance expected in different parts of the country due to drought and army worm.



#### Trader Perception on future price changes

- Meanwhile price for beans has dropped down to only UGX 2,500 / kg as a result of increased supply which is available in the market.
- Prices of vegetables such as onions also decreased due to increased supply.
- Then prices will begin to increase in January up to June next year 2018.

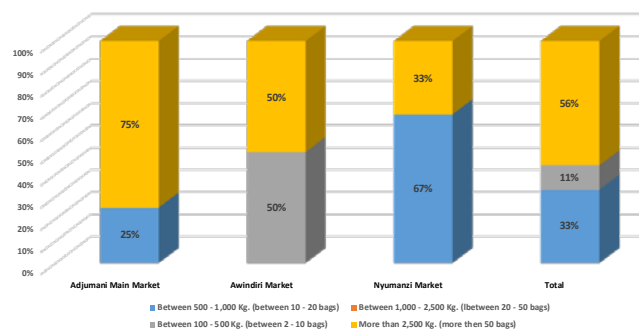
Commodity	Price	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Maize	High												
	Low												
Beans	High												
	Low												
Sorghum	High												
	Low												

*Period when prices are expected to be high normally*

## Market Response capacity

### Capacity to supply food timely

- All traders in Adjumani main market have storage facilities of which 75% can store more than 2.5MT.
- Only 50% of the traders in Awindiri market have storage facilities since majority operate in open spaces. Of those that have storage facilities 50% have small capacity of 100-500kg and the remaining half have bigger capacity that can store more than 2.5MT.
- 75% of the traders in Nyumanzi have storage facilities disaggregated as small (11%), medium (33%) and bigger capacity (56%).



### Proportion of traders with different storage capacity

- All traders in all markets around Adjumani/Pakelle settlement indicated that they have capacity to respond in case demand doubled. Trader in Adjumani main market and Nyumanzi said that they would be able to respond to the increase in demand within one week. 75% of the Traders in Awindiri market would be able to respond within one week and 25% in two weeks.
- One of the challenges that would affect response capacity is difficulty in finding commodities during times of scarcity.

### Major constraints

- Some wholesalers are both whole selling and retailing food commodities to bigger and smaller customers thereby out competing retailers.
- At times there is not adequate supplies of food commodities in the market.
- The major sources of food commodities for sales are very far (Gulu, Kiryandongo etc) and traders have inadequate capital to these places.
- There is poor management of garbage in Awindiri market. The market is filthy, smelly and the environment is bad/not good.
- There is inadequate shelter for people during rainy periods.
- Other challenges mentioned include stiff competition as there are many traders in Adjumani main market and Awindiri market; and theft.
- Few customers in Awindiri and Nyumanzi markets was also highlighted as a problem by traders.

### Safety and Security

- No safety or security related incidences were reported by traders in Adjumani main market.
- 50% of the traders in Awindiri and Nyumanzi markets reported safety or security incidences related to robbery without violence.
- Most of the incidences take place at the shop/stall and traders proposed the deployment of more security personnel/police around the market places especially at night and security lights.

*Adjumani/Pakelle Settlement Price Data 8th June 2017*

Commodity		units	Main Market price	Awindri price	Nyumanzi price	Average price
1	Maize grain	kg	2,000	2,000	2,000	2,000
2	Maize flour	kg	3,000	3,000	3,100	3,033
3	Rice (Pakistan)	kg	3,600	3,500	4,000	3,700
4	Rice (Kaiso)	kg	3,633	3,333	3,733	3,567
5	Wheat flour	kg	2,750	2,750	3,000	2,833
6	Cassava flour	kg	2,000	1,500	2,000	1,833
7	Cassava-fresh	hip	2,200	2,000	2,000	2,067
8	Sweet potatoes	hip	1,500	2,000	2,000	1,833
9	Beans (Nambale – red with spots)	kg	3,000	2,800	3,000	2,933
10	Beans (Agwede)	kg	2,900	2,800	2,800	2,833
11	Beans (Yellow)	kg	4,000	3,600	3,500	3,700
12	Vegetables (Tomatoes)	kg	3,000	3,000	3,000	3,000
13	Vegetables (Onions)	kg	4,000	3,500	3,500	3,667
14	Irish Potatoes	kg	3,500			3,500
15	Beef	kg	10,000	9,000	10,000	9,667
16	Fish	kg	9,000	9,000	9,500	9,167
17	Chicken	hen/cock	26,000	24,000	27,333	25,778
18	Cooking Oil	litre	6,000	6,000	6,000	6,000
19	Sugar	kg	4,800	5,000	5,500	5,100
20	Millet Flour	kg	4,500	4,200	4,500	4,400



# MARKET ASSESSMENT REPORT


KOBOKO, PALORINYA & IMVEPI  
SETTLEMENTS

ANALYSIS CONDUCTED BY:

ANALYSIS, MONITORING  
& EVALUATION (AME)

WFP-UGANDA

Nathan Lowanyang; Jeff Mungu; and  
Jeniffer Nalugonda



WFP provides food assistance to vulnerable refugees in Uganda through a combination of in-kind food and cash based transfers. Beneficiaries not only enjoy the flexibility of buying food of their preference as a result of cash based transfer but also the timeliness, dignity and efficiency associated with cash based transfers (as noted in a number of studies).

WFP ensure that feasibility studies are conducted to ascertain if markets are functional and can support cash based transfers with no impact on local food prices, intra-household dynamics, host-refugee relations and other socio-economic factors. In addition WFP collects monthly price data across key markets in settlements where cash base transfers are implemented to monitor the WFP cash transfer value in relation to the market value of an in-kind food baskets.

In addition to the price and refugee market monitoring system, it is clear that detailed information on other key components like market systems and structure, demand and supply, market conduct and response capacity is also necessary. This information is critical to support decision making related to the implementation of cash based transfers. Therefore, the AME Unit support by programmes and supply Chain began to conduct detailed market assessments across all settlements since June 2017.

Three settlements were visited during the second round of the market assessments and these include, Koboko, Imvepi and Palorinya.

### **Methodology and data collection**


A team from AME and Supply Chain was formed, with support from SO. These are part of the 16 staffs that were previously trained.

The data was collected through structured interviews, with key informants including traders, market chairpersons and/or market masters, local leaders and OPM (Commandants). A market observation checklist was also used to collect price data on available food commodities. The traders' survey tools were programmed using ODK, and data collected using tablets, while the key informants and market observation checklists were printed on paper.

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Data collection in Koboko was carried out on the 15<sup>th</sup> August, 2017. Markets visited included; Lodonga Market and Koboko main Market. Seven (7) traders were interviewed during the assessment.

## **Summary of the findings, conclusions and recommendations**

### ***Market structure***

- Lodonga and Koboko main market are well established, with about 700-1,000 traders. In Lodonga market, 67% of the traders set up business 1-3 years ago, a similar proportion of traders in Koboko market started operating more 5 years ago;
- While Lodonga Market (mainly accessed by refugees) is about 8 KMs from the settlement, Koboko main Market is 12 KMs far, implying beneficiaries walk long distances to access markets;
- Koboko main market operates daily, but Lodonga market is more vibrant only on Tuesday and Thursday, attracting external traders, particularly on these days;
- Arua, Masindi, Hoima, Kampala, Yumbe and Gulu are the main sources of supplies on the market. Maize grain is mainly from Kiryandongo, Masindi and Hoima. Supplies from the local farmers are low, and this has a significant impact on the market prices;
- Traders offer commodities to customers on credit, but expect to receive payments within 1-2 weeks (68%);

### ***Market prices and trader response capacity***

- Generally, the average retail prices for major commodities are slightly higher in Koboko main market compared to Lodonga market, due to high demand both in Town and other neighboring communities; Koboko main market is also a main source of supplies for small scale traders;
- 68% of the traders in Lodonga market reported that commodity prices are collectively set by traders;
- 43% of the overall traders anticipate a slight decrease in the average retail prices in the next 3-6 months due to improved supplies on the market, Lodonga market (68%) had the highest proportion,;
- Generally, 43% of the overall traders have capacity to respond to increased demand within 1 week, the highest proportion was in Koboko main market (67%);
- 71% of the overall traders had storage facilities. No trader in Lodonga market had storage facilities with capacity of more than 5,000 Kgs.

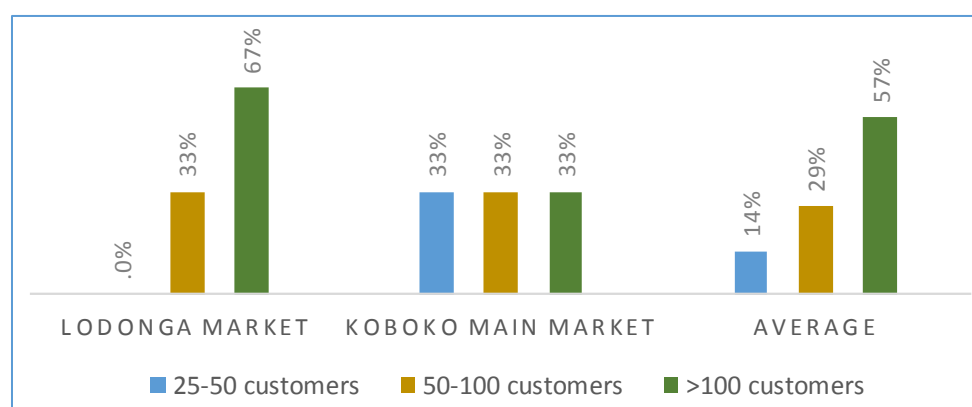
## **Conclusions and recommendations**

Markets around the settlement are well established and can support the cash transfer, due to the following;

- High number of traders (700-1,000) in both markets, improving supplies on the markets;
- Availability of storage facilities, indicating that traders have the capacity to respond to increased demand;
- Majority of the traders have the capacity to respond to increased demand within 1 week, with the majority (67%) in Koboko main market.

## Detailed analysis of the markets (Koboko Main market and Lodonga Market)

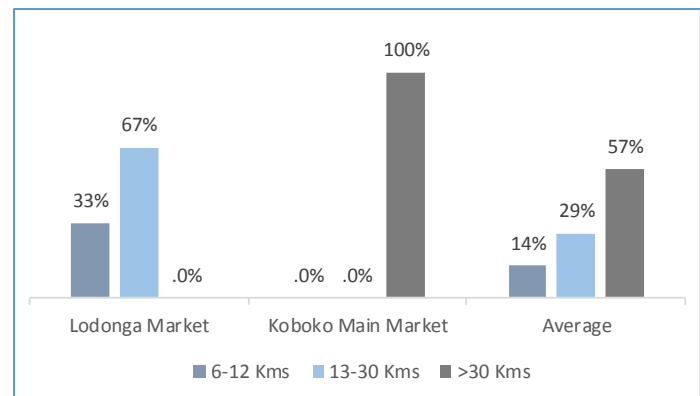
MARKET STRUCTURE	
MARKET CHARACTERISTICS	
Lodonga Market	Koboko Main market
<ul style="list-style-type: none"> <li>It is a government market, but managed by market chairperson. Market has both permanent structures and makeshifts; with more than 50 stalls/lock-ups, and about 200 shades;</li> <li>About 8 KMs from the settlement, and it is the main market accessed by refugees;</li> <li>Open daily, but more active two days a week (Tuesday and Thursday), these are main market days and external traders also come to trade in the market, <i>"On the main market days, Tuesday and Thursday, traders from Koboko and other neighboring districts come to sell produce here, and these are days when customers come to buy produce in bulk. Big suppliers also come to supply their agents with commodities to sell during the market day."</i></li> <li>About 700-1,000 traders in the market; 30-20 traders sell maize grain beans respectively; majority of the traders are small scale traders;</li> <li>While 67% opened business between 1-3 years ago, 33% established businesses more than 5 years ago;</li> </ul>	<ul style="list-style-type: none"> <li>Managed by the government, and individuals given tenders; market operation is overseen by a market master; more than 150 lock-ups and 500 shades (permanent and makeshifts) in the market;</li> <li>About 10 KMs from the settlement; accessed by the whole population in the district, including Yumbe and Moyo districts; some refugees who live in town purchase mainly leafy vegetables from the market;</li> <li>Some refugees are vending in the market; there is free entry to the market;</li> <li>About 8-20 traders are dealing in maize grain and beans respectively; big stores for maize flour and beans were observed in the market; women mainly vend leafy vegetables;</li> <li>More than half (67%) of the traders set up businesses more than five (5) years ago, while 33% did so less than 1 year ago; market operates daily, with 33% of the traders reportedly running business 2-4 days a week;</li> <li>Generally, 57% of the traders serve more than 100 traders in a week;</li> </ul>



*Estimates of customers served*

## Commodity flow

- Cereals, pulses, veg. oil, leafy vegetables and flour are available in the markets; commodities supplied from outside the settlement (other districts and regions) due to low productivity; *“Our men are very lazy, and families produce for home consumption, not for the market, reducing local supplies. This is risky for us as traders, including refugees and other consumers.”*
- Main source of supplies are; Yumbe, Koboko, Arua, Northern Uganda (Gulu), Kampala and Masindi for traders in **Lodonga Market**; while traders in **Koboko main Market** obtained supplies from Arua, Masindi, Hoima, Democratic Republic of Congo (DRC), and Kampala;
- Kiryandongo, Masindi and Hoima are the main sources of maize grain. However, with a good harvest, traders buy from local farmers and bulk,
- Big companies such as Nature’s harvest, a local factory supplies Vegetable oil;
- While all traders in Koboko main Market travel more than 30 KMs to purchase produce, 67% in Lodonga market travel between 13-30 KMs;
- Initially, beneficiaries (Refugees) could sell to local traders, increasing supplies on the markets, *“I used to buy grains (maize and pulses) from refugees, bulk and sell in the market. I made profits since refugees were selling cheaply. It didn’t require travelling to outside the district. These days, they don’t sell, I hear they no-longer receive food, but cash.”*



*Distance traveled to buy produce*



*One of the stores in Koboko main Market*

*“Majority of the traders in this market are farmers, these are small scale farmers, they only come to sell commodities in small quantities, maybe when they are faced with some problems such as health related and school fees. They are always many in the market around July-October. Of course, some farmers supply small scale traders in the market, some traders buy in bulk during harvest season.”*

## MARKET CONDUCT

### Market regulations

- By-laws in existence in all markets, these are enforced by market masters. Stealing, fighting, quarrelling, and operating outside recommended hours are prohibited;
- No restrictions for new traders to operate in the markets, but procedures have to be followed such as notifying the market chairperson and payment of market dues.

## Credit availability and access

- Most traders reportedly don't get loans from banks, prefer credits from trader associations and Village Savings and Loans Associations (VSLAs), *"financial institutions charge high interests, and conditions are very tough for small scale traders like us"*
- Companies and other suppliers supply produce and commodities on credit to some traders, and later collect their money, during the next delivery. *"This is good, sometimes when you don't have money, you get produce from the supplier and sell, then later pay back. We are given a period of one 1-2 weeks to clear, but mostly they collect cash in the next delivery."*
- Traders offer commodities to customers on credit, but depends on the relationships, *"when a customer takes something on credit this market day, I expect him/her to pay the next market day, with business, you need money. Of course sometimes, some people are bad, they will not appear for a long time and we face challenges dealing with them"*
- 80% of the overall traders expect customers to pay within 1-2 weeks. While all traders in Lodonga market reportedly want customers to pay within 1-2 weeks, 68% expect payments within the same period in Koboko main market;

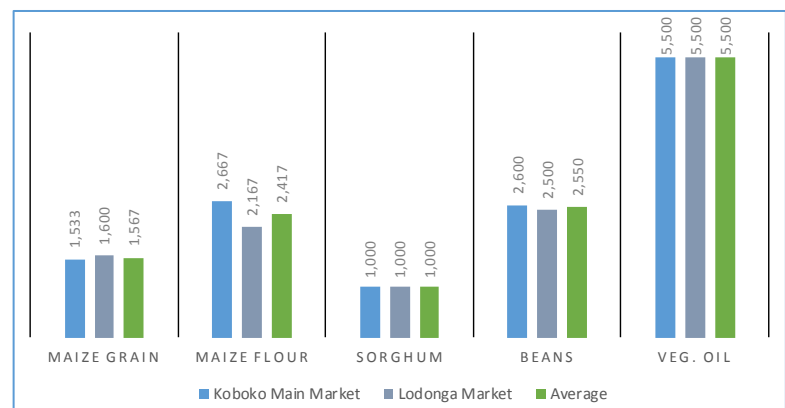
## MARKET PRICE CHANGES AND PURCHASING POWER

### Transaction costs

- **Lodong market:** Rent (30,000 monthly); ground rent (10,000 yearly); market dues (1,500 per sack); feeding; offloading (depends);
- **Koboko main Market:** Daily market dues (1,500 per sack); rent charges, those renting stalls (100,000 per month); trading license (12,000 quarterly); ground rent; store permits, traders with huge stocks, *"they form groups, rent stores to store their produce. 120,000 is charged yearly as store permit"*
- Daily markets dues across markets depend on the quantities (number of bags) a trader can sell, the more bags, the more charges;

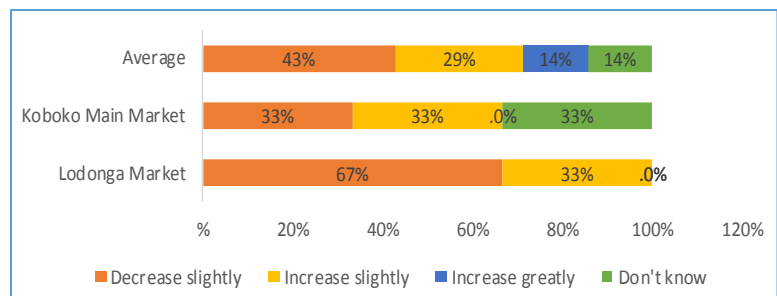
### Commodity price changes

- The average retail price for maize flour and beans were higher in Koboko main market, compared to Lodonga market, due to the high demands. Koboko main market is a central market, with majority of the population accessing the markets, including traders from neighboring districts;
- In Koboko main market, all traders reported that prices are set collectively by traders in the market, compared to 68% in Lodonga market;



Current average commodity prices

- 43% of the overall traders anticipate a slight decrease in commodity prices in the next 3-6 months, while 29% expect a slight increase;
- Prices changes are mainly driven by either high or low supplies on the market;
- Supplies from local farmers is inadequate due to low production, majority of the farmers are subsistence farmers, thus, influencing commodity prices;
- Average prices for commodities are expected to remain fairly stable, due to improved supplies from the recent harvest;
- Prices for key commodities are generally lower during the harvest season (August-December);



*Trader opinions on future price changes*

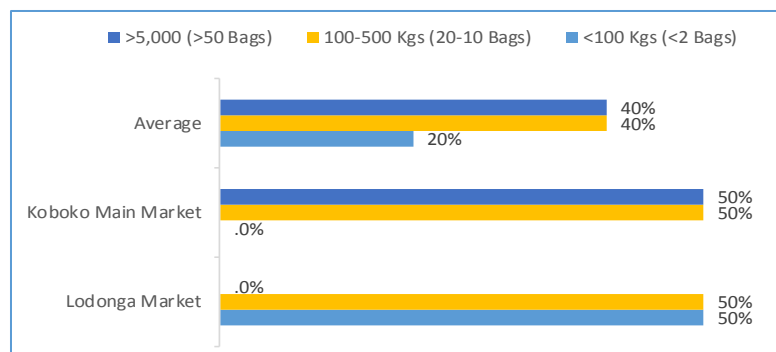
Commodity	Price change	Month											
		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Maize grain	High												
	Low												
Sorghum	High												
	Low												
Beans	High												
	Low												

*Periods/Months when price changes are observed*

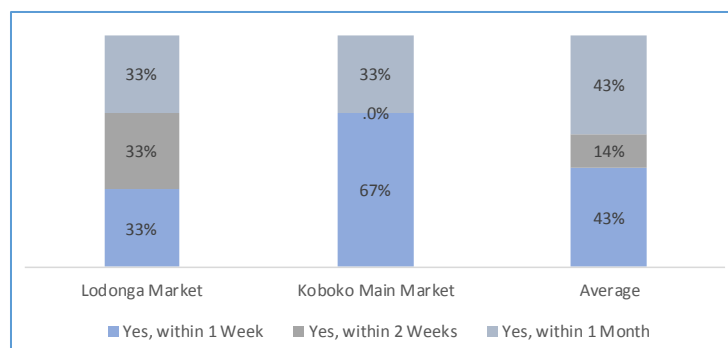
## MARKET RESPONSE CAPACITY

### Trader capacity to respond

- 71% of the overall traders had storage facilities, with 40% of the traders reportedly having storage with capacity of more than 5,000 KGs (>50 Bags). No trader in Lodonga Market had storage with capacity of more than 5,000 KGs;
- Overall, 43% of the traders have capacity to respond to increased demand within 1 week, with the highest proportion observed in Koboko main market (67%). 14% said they could respond within 2 weeks;
- The main challenges traders could face while responding to increased stock were: lack of capital (71%). In Lodonga market, all traders cited lack of capital as the main challenge they could face while responding to increased demand;



*Capacity of storage facilities owned by trader*



*Traders' capacity to respond to increased demand*

## SAFETY AND SECURITY INCIDENTS

- No reported security incident, both for traders and customers despite the long distances traveled to access markets

## IMPACT OF FOOD AID ON THE MARKETS

- It is positive, but very risky, especially for the host communities. *"Refugees after receiving cash, they come to the market, buy all the food in the market, and they buy in bulk. Due to this, food gets scarce, forcing us traders to charge high prices. This, affects other consumers. If we had local farmers supplying us with food, it would be easier, but now a lot of produce is from out, increasing the cost of business. For instance, rice is from DRC, farmers don't grow rice."* *"I suggest that you people (Government and WFP) have to balance the assistance, distribute both cash and food to refugees. Some refugees should receive food, while other receive cash, controls demand and supply, it is risky distributing only cash"*
- Sales are high, and farmers are growing more food, due to increasing demand from refugees. *"You know refugees have no farm land to grow food for home consumption, besides, they have a lot of money and also buy too much food. Our local farmers were initially subsistence farmers, but currently produce for markets."*
- Sales go up during and after distributions, *"we mostly supply traders who have small shops within the settlement, but for direct buyers (customers), we don't see any impact, it is minor. There are so many emerging markets, like Terego-Kubala, refugees can go buy from there due to distance and prices. So, we can't feel the impact so much."*
- Some traders contracted by DCA are benefiting, *"my mother has a business in Yumbe (Bidi-bidi) and she supplies refugees with food, they use vouchers, so she gives them food/commodities and she later takes vouchers to DCA to claim for her payments."*
- Diversification of livelihoods among refugees, *"some refugees are investing in petty trade, after receiving cash, they buy produce in bulk to re-sale in the local market within the settlement. The profit they earn sustains their families while waiting for the next distribution, these also enables other households to access food in the markets, other than travelling long distances."*
- Some refugees rent more farm land, *"to produce food for their households, for instance, there is a woman who hardly had food, but relied on the assistance, she had to rent land and now produces enough food for her family, she also uses these assistance to hire farm labour."*

## CHALLENGES FACED BY TRADERS

- Heavy rains: roads are impassable during rainy season, hindering deliveries to markets, for instance sweet potatoes and cassava are not delivered timely. Similarly, most traders operate in the open, so heavy rains affect them. Also during rainy seasons, customers don't come to the market, so, sales are low;
- Distance to markets, traders come from far and have to be in the market in time. Similarly, consumers also have to travel long distances to purchase produce. *"We could advocate for the allocation of a market day for the settlement, so that produce is brought closer to the people, the challenge is, traders will not come, the population is low, as most refugees stay outside the settlement (town), the purchasing power among the refugees is also low, hence, the traders will make losses."*
- Lack of customers, particularly in some periods of the year, during harvest when most households have food;
- Low supplies, due to refugee influx, *"big suppliers these days prefer supplying produce to big camps like Bidi-Bidi, due to the high populations there, affecting traders in this market."*
- Low capital-low stock, and no business;
- Price changes/fluctuations, prices for some commodities start increasing around September, and highly during the lean season (March-May).

Settlement market price data as of 15<sup>th</sup> August, 2017

S/n	Commodity	Unit	Market		Average
			Koboko Price	Lodonga Price	
1	Maize grain	Kg	1,533	1,600	1,567
2	Maize flour	Kg	2,667	2,167	2,417
3	Rice (Super)	Kg	3,000		3,000
4	Rice (Pakistan)	Kg	3,333	3,433	3,383
5	Wheat flour	Kg	3,000	2,800	2,900
6	Cassava flour	Kg	1,933	1,800	1,867
7	Cassava-fresh	Kg	917	1,000	958
8	Sweet potatoes	Kg	1,333	1,000	1,167
9	Beans (Nambale)	Kg	2,600	2,500	2,550
10	Beans (Agwede)	Kg	1,667	2,000	1,833
11	Beans (Yellow)	Kg	3,000	3,000	3,000
12	Peas	Kg	3,333	3,000	3,167
13	Vegetables	Kg	1,500	1,000	1,250
14	Irish Potatoes	Kg	2,000		2,000
15	Beef	Kg	10,000	9,000	9,500
16	Fish	Kg	10,500	10,667	10,583
17	Chicken	Kg	20,000	22,000	21,000
18	Cooking Oil	Kg	5,500	5,500	5,500
19	Sugar	Kg	4,333	4,800	4,567
20	Millet Flour	Kg	4,000		4,000
21	Sorghum	Kg	1,000	1,000	1,000
22	Salt	Kg	1,200	1,200	1,200

*Current commodity prices*



Data collection in Palorinya was carried out on the 16<sup>th</sup> August, 2017. Markets visited included; Moyo Main Market and Konyokonyo Market (within the settlement).

Summary of the findings, conclusions and recommendations

### ***Market structure***

- While Konyokonyo market (within the settlement) is about 2 KMs depending on the settlement, Moyo main market is about 10 KMs far; customers will have to travel long distances in case of increased demand, since Moyo market is well established; both markets operate daily;
- Overall, 36% of the traders travel more than 30 KMs to buy stock, with the highest proportion observed in Konyokonyo market (50%); beans, maize grain, Rice and sorghum are mainly sourced from Gulu, Arua, Mbale, Masindi and Hoima;
- Sorghum, Maize grain, Veg. oil and beans in Konyokonyo (settlement market) is mainly the in-kind food (distributed by WFP), however, quantities in markets are small, possibly due to low demand;

### ***Market prices and trader response capacity***

- Generally, commodity prices are mainly set by individuals (73%), followed by traders' associations (18%). Majority (75%) of the traders interviewed in Konyokonyo markets reported that prices are set individually;
- 45% of the overall traders expect a marginal price increase in the average prices for commodities in the next 3-6 months;
- While 64% of the overall traders have capacity to respond to increased demand within 1 week, it is worth noting that majority of the traders are small scale traders; traders in Konyokonyo market fear to re-stock due to uncertainties regarding the planned relocation of the market;
- 64% of the overall traders have storage facilities. However, in Konyokonyo market, nearly all traders use the small space in their stalls for storage;

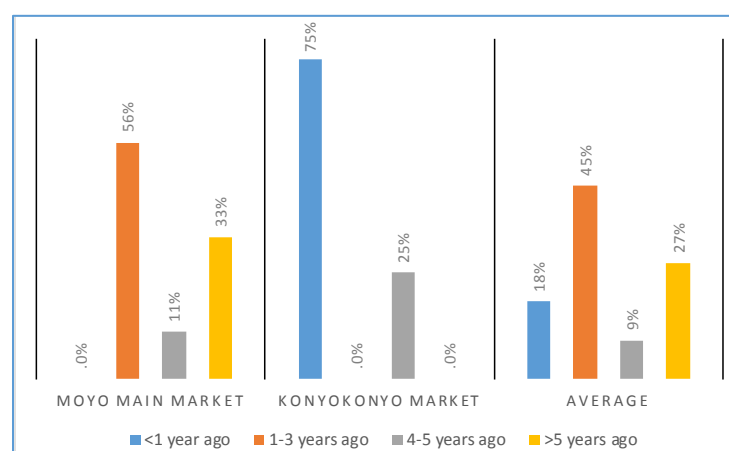
### **Conclusions and recommendation**

Moyo main market is well established compared to the settlement market (Konyokonyo) and would be an alternative for customers, however, customers will have to travel long distances to access the market. Similarly, traders in Moyo main market can boost the settlement market, with strong linkages. However, there is need to:

- Monitor market prices on a weekly basis, and availability of key commodities in the settlement market;
- Create strong market linkages, by linking traders in the settlement market with those operating in Moyo main market;

## Detailed analysis of the markets (Moyo Main market and Konyokonyo Market)

MARKET STRUCTURE	
MARKET CHARACTERISTICS	
Moyo main Market	Konyokonyo market
<ul style="list-style-type: none"> <li>Government issued tenders to individuals who have constructed lock-ups currently rented by traders; market managed by the market chairperson, and market dues collected by the market masters;</li> <li>There are 25 lock-ups; 56 stalls and 20 shades; both structures are permanent, including shades used by vendors;</li> <li>Market is about 10 KMs from Palorinya settlement; operates daily, with 89% of the traders reporting that they operate daily (5-7 days); the market supplies other weekly markets;</li> <li>Despite being accessed by refugees occasionally, it remains an alternative to refugees due to the distance;</li> <li>About 500 traders operate in the market, with Women being the majority of the vendors; only 33% of the traders interviewed serve more than 100 customers weekly, <i>"customers are scarce, maybe it is due to the recent harvest that has lowered the demand for food. Some new markets are cropping up within communities, so, customer would prefer buying from those traders, other walking long distances to the market."</i></li> </ul>	<ul style="list-style-type: none"> <li>It is within the settlement, accessed by both refugees and nationals within the surrounding;</li> <li>Market is new, 75% of the traders established shops less than a year ago; 75% reportedly serve more than 100 customers weekly, possibly due to the high populations;</li> <li>There are about 50 stalls and 100 shades, temporal structures;</li> <li>There is a plan to re-locate the market by government, preferably outside the settlement. <i>"We are told government wants to take control of the market, so, they find it hard to manage since it within the settlement."</i></li> <li>About 2 KMs for some zones, but some zones within the settlement are far, but buyers don't spend cash on transport;</li> <li>An estimated 300 traders, mainly small scale traders; roughly 5-15 traders sell maize grain and beans respectively; 1 wholesaler; and majority of the traders are refugees;</li> </ul>

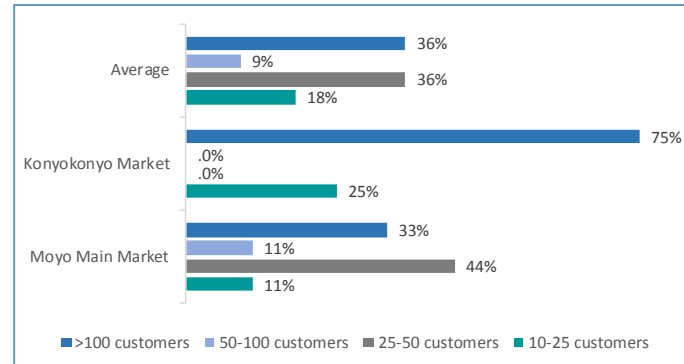


When business was established

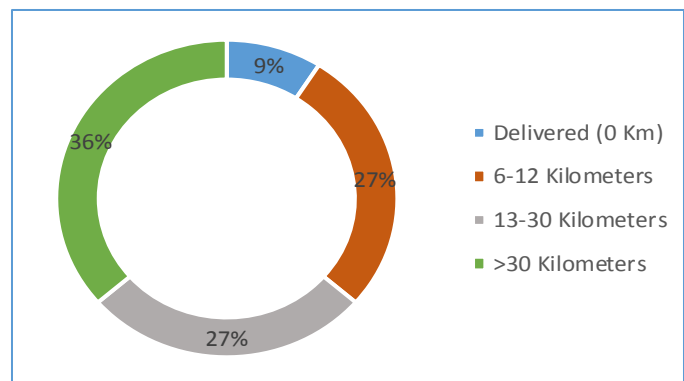
- About 500-700 buyers in the market (Konyokonyo), but more busy during distributions, with a significant number of National flocking the markets and distribution centers to purchase maize grain and beans;

### Commodity flow

- Overall, 36% of the traders travel more than 30 KMs to buy stock, with Konyokonyo market (50%) having the highest;
- Beans, maize grain, Rice and sorghum are purchased from Gulu, Arua, Hoima, Masindi and Hoima; leafy vegetables such as onion, tomatoes, cabbage, and egg plants are from Mbale, Kampala, and Masindi; *“buying rice from the local farmers is very expensive, so, traders prefer buying from other regions, all you need is just to calculate the costs and other risks.”*



Number of traders served weekly



Distance travelled to buy stock

- In-kind food sold in the market, especially maize grain, sorghum, beans, CSB and cooking oil, and mainly sold by refugees. Nationals are the main buyers of these items; *“People sell food because they want to buy other items like soap. So, you sell half of your rations, keep the balance for family consumption, we don’t have income sources and this forces us to sell.” “Refugees are becoming very wise, they have registered more than once, and have two or more ration cards. So, food rations for one card are spared for consumption, and the other is sold.”*
- Majority of the traders in Konyokonyo market (especially those operating in stalls) deal in NFIs like clothes, utensils, and soap, *“Dealing on commodities would be a good business, but I can’t do that business now. Too much food is distributed by World Vision and WFP, no one will buy food. So, I prefer specializing on NFIs and maybe Sugar, and salt.”*
- Quantities of food commodities sold in the market are small;
- No local supplies, due to low productivity *“I think nationals within the community are mainly subsistence farmers, they produce mainly for home consumption. Who knows, maybe they will start producing for the market in future due to increasing population in the refugee settlement. This settlement is also new, and refugees have just settled here, they don’t grow crops and it is traders to supply food to them, perhaps, things will change after a year.” “Plots or farm land given to refugees are small (30\*30), you construct a house, spare some space and nothing is left for cultivation, the land is also not fertile.”*
- Farmers during and after harvest improve supplies on the market, except harvest for the past 3 years has been below average due to prolonged dry spells;

- BIDCO and TASCO, companies are supplying traders in Moyo Main Market.

## MARKET CONDUCT

### Market regulations

- By-laws and regulations such as; fighting and theft are prohibited; traders are also encouraged to market dues promptly; by-laws are enforced by the market chairperson and his committee;
- No restrictions in place to start a business in the market; while traders in Moyo main market use standard weighing scales, in Konyokonyo, traders have no weighing scales, but use estimates and cups.

### Credit availability and access

- Credit facilities given to consumers, with terms of payments, *“I give food on credit to someone I know, especially a daily customer, neighbor, friend and possibly anyone who is credit worthy. For instance, I can’t sell to you (referring to the interviewer) on credit because I am meeting you for the first time and not sure if we are meeting again.”* Generally, payment period is 1-2 weeks (75%), with all traders in Konyokonyo market allowing their customers to pay within the same period.
- Traders in Moyo main market prefer Village Savings and Loan Associations (VSLAs), and Small trader groups and not banks to access loans or credit. Other financial institutions are Moyo SACCO, and Moyo Local Government SACCO.

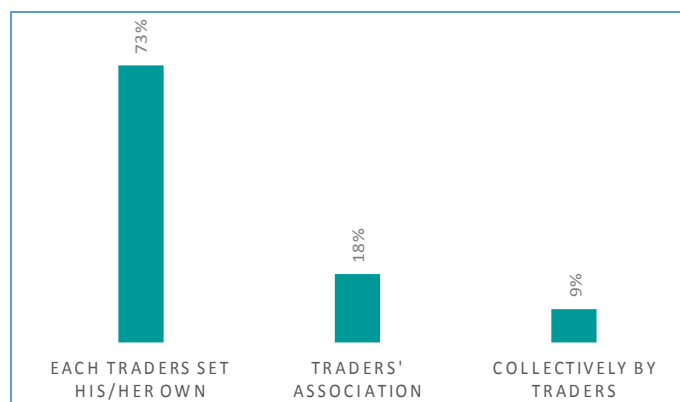
## MARKET PRICE CHANGES AND PURCHASING POWER

### Transaction costs

- **Moyo main Market-** Rent (50,000-100,000 monthly); trading license (40,000-75,000 yearly), depends; transportations costs, depends;
- **Konyokonyo market-** transport costs; no rent but have to incur costs for materials and labor for setting up the structure.

### Commodity price settings

- Overall, commodity prices are mainly set by: individual traders (73%), followed by traders’ associations (18%);
- Majority (75%) of the traders interviewed in Konyokonyo market reported that commodity prices are set by individual traders, possibly due to the fact that most traders are small scale and sell in small volumes;
- Despite 67% of the traders in Moyo main market citing individual price setting, 22-11 percent reported that prices are set by traders’ associations and collectively by traders respectively;



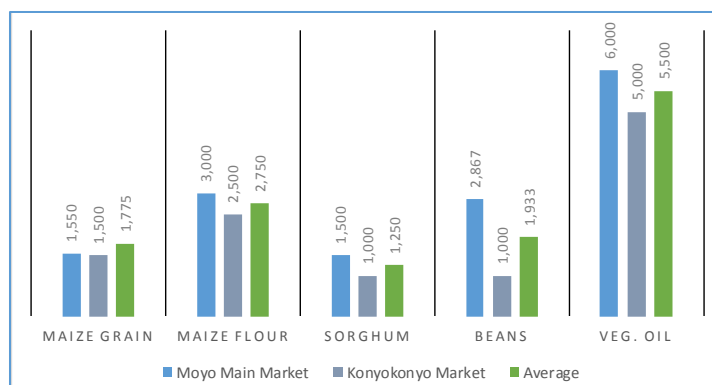
*How commodity prices are set*

## Commodity Price changes

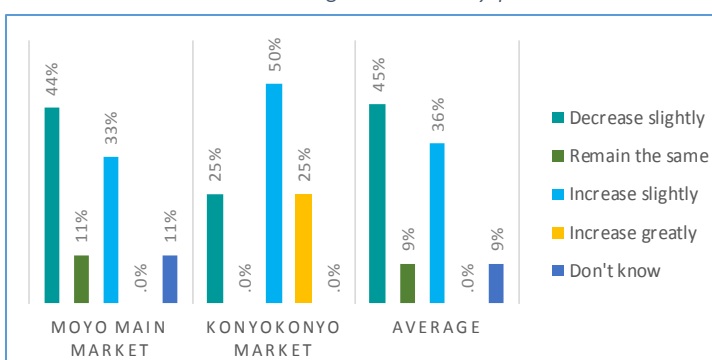
- Average retail price for key commodities are significantly higher in Moyo main market compared to Konyokonyo market (within settlement). The average price for beans is UGX 2,867 in Moyo market, and UGX 1,000 in Konyokonyo market;
- 45% of the overall traders expect a marginal decrease in the average prices for commodities in the next 3-6 months, while 36% reportedly anticipate a minor increase;
- In Konyokonyo market, 25% of the traders expect a significant increase in the average prices for key commodities in 3-6 months, possibly due to scarcity, and high transport costs incurred;
- Commodity prices are always higher between February and August. Harvest season for Sorghum usually starts in September, with its average price declining in August due to replenishment of stocks, reducing the demand;
- Between October and February, average prices for Rice, Simsim and Ground-Nuts are usually very low;
- June is reportedly a stressful month, *“this month is too dangerous, no food, heavy dependence on markets amidst higher prices, and besides there is no harvest yet.”*

## TRADER CAPACITY TO RESPOND

- 64% of the overall traders have storage facilities. While 56% in Moyo main market have storage facilities;
- Majority (43%) of the traders have storage facilities with capacity of above 5,000 Kgs, followed by 1,000-2,500 Kgs (29%);



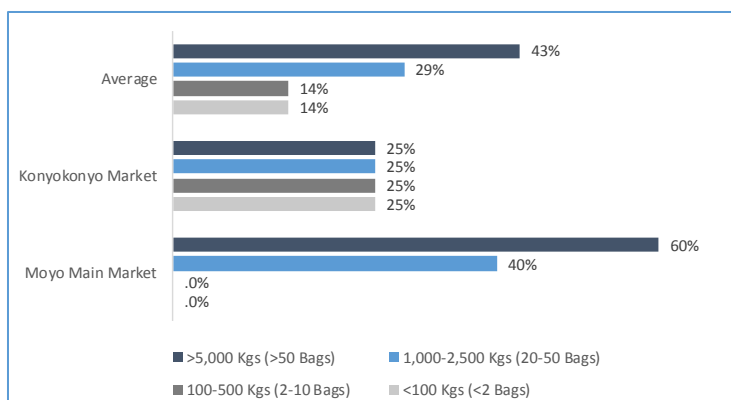
Current average commodity prices



Trader opinions on future price changes

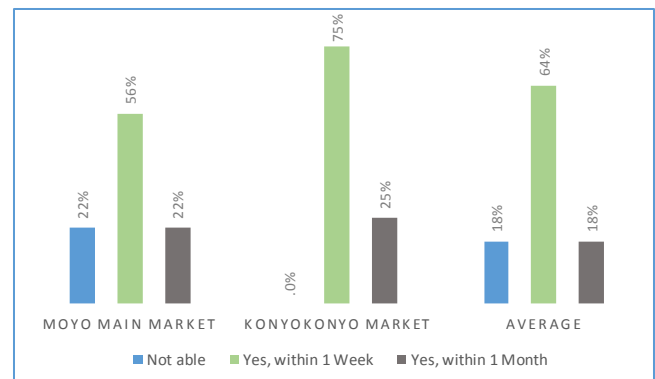
Commodity	Price change	Month											
		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Maize grain	High												
	Low												
Sorghum	High												
	Low												
Beans	High												
	Low												

Periods/Months when price changes are observed



Capacity of storage facilities

- While 64% of the overall traders have capacity to respond within 1 week, 18% have no capacity to respond in case of increased demand; it is worth noting that majority of the traders are small scale, with little capital;
- Traders that are unable to increase stock cited; lack of capital (64%); lack of transport (18%) and difficulty in finding commodities (18%) as the main obstacles;
- 78% of the traders interviewed in Moyo main market cited capital as a challenge, this is risky if there would be need to boost supplies in the market within the settlement;
- Traders in Konyokonyo Market fear to restock due to uncertainties, *"Stocks are less, due to the uncertainties, the government plans to re-locate the market, and we can't buy more stock since we don't know when we shall be re-located. So, traders are worried that they might make losses. See the market, not busy as it was 1-2 months ago."*
- Generally, traders increase stock depending on the demand and the purchasing power, *"as a trader, I study the demand and also the money in circulation, you can tell it in the purchasing power of households. So, when the demand is high, we supply, we increase our stock."*



*Trader response capacity to increased demand*

## SAFETY AND SECURITY INCIDENTENCES

- No safety or security incidences, however, 11% of the traders in Moyo main market feel insecure. *"Reported theft cases are minor and doesn't affect the operation of the business, in business, theft is inevitable."*

## CHALLENGES FACED BY TRADERS

- Low supplies on the market. Traders buy from far, the nearest being Moyo main market. *"No suppliers come here, whenever you want to re-stock, there is no supply, transport cost is high. It would be easier if this was a highway, you could move your produce easily."*
- Lack of collective price setting, no uniformity in commodity prices, *"some traders, especially farmers just sell because they have an emergency, so, they sell at any given price. It affects business."*
- Low sales, usually during harvest season due to low demand;
- Competition from new emerging markets, *"customers have so many markets to buy from, and so, they come comparing prices blaming us for high prices. Honestly, they don't understand the supply dynamics."*
- Transport challenges, no bigger trucks plying major routes, increasing transportation costs;
- Delayed payments by customers, *"some customers don't pay in time, we don't know what is wrong, I think they lack income sources."*

## IMPACT OF FOOD AID ON THE MARKETS

- More supplies on the market, too much maize grain, beans and maize flour in the market during and after distributions; low prices for commodities, due to improved supplies;

Settlement market price data as of 16<sup>th</sup> August, 2017

S/n	Commodity	Unit	Market		Average
			Moyo Price	Konyokonyo Price	
1	Maize grain	Kg	1,550	1,500	1,525
2	Maize flour	Kg	3,000	2,500	2,750
3	Rice (Super)	Kg	3,950		3,950
4	Rice (Pakistan)	Kg	4,000		4,000
5	Rice (Kaiso)	Kg	3,500		3,500
6	Wheat flour	Kg	3,125	3,000	3,063
7	Cassava flour	Kg	2,000	1,900	1,950
8	Cassava-fresh	Kg	1,000	1,000	1,000
9	Sweet potatoes	Kg	2,000		2,000
10	Beans (Nambale)	Kg	2,867	1,000	1,933
11	Beans (Agwede)	Kg	2,500		2,500
12	Beans (Yellow)	Kg	3,000		3,000
13	Peas	Kg	1,833	1,000	1,417
14	Vegetables (Greens)	Kg	1,000	1,000	1,000
15	Vegetables (Onions)	Kg	3,000	3,500	3,250
16	Irish Potatoes	Kg	2,000	2,000	2,000
17	Beef	Kg	9,000	10,000	9,500
18	Fish	Kg	8,000	10,000	9,000
19	Chicken	Kg	23,500		23,500
20	Cooking Oil	Kg	6,000	5,000	5,500
21	Sugar	Kg	1,500	4,000	2,750
22	Millet Flour	Kg	4,000	1,500	2,750
23	CSB	Kg		1,500	1,500
24	Sorghum	Kg	1,500	1,000	1,250
25	Salt	Kg	1,200	1,200	1,200

*Commodity prices in Markets*

Data collection in Imvepi was carried out on the 17<sup>th</sup> August, 2017. Only one market was visited, it is within settlement, located at Point J.

## **Summary of the findings, conclusions and recommendations**

### ***Market structure***

- The market is within the settlement, and about 1-2 KMs from some settlement zones; market operates daily, 93% of the traders reportedly run business daily (5-7 days a week);
- Market has about 200 stalls, with more than 500 shades, no permanent structures and majority of traders (Women) sell in the open and on the ground;
- Key commodities are available in the market, except in small volumes; beans, sorghum and maize grain sold in the market is the in-kind food;
- More than 1,000 traders operate in the market with an estimated 20-30 dealing in beans and maize grain respectively; 70% of the traders are refugees, and among those selling food stuffs, the majority (about 80%) are Women;
- Companies such as Riham and BIDCO have established agents within the market, and supply them 1-2 times a week;
- Half (50%) of the traders travel more than 30 KMs to buy produce, due to scarcity.

### ***Market prices and trader response capacity***

- Average retail price for commodities in the market are slightly lower, compared to average prices in external markets (Koboko), possibly due to the low demand within the settlement;
- 36% of the traders expect average prices for commodities to remain the same. However, 29% anticipate a slight increase;
- Despite 86% of the traders having storage facilities, these are makeshifts. 42% have storage with capacity of 100-500 Kgs, while 33% have capacity of >5,000 Kgs;
- 77% of the traders reportedly have capacity to respond to increased demand within 1 week.

### **Conclusions and recommendation**

The market very busy, well established and has the potential to expand. With enhanced linkages, more companies can be attracted in 2-3 months. There is however, need to:

- Engage traders in Arua and Koboko so that they can boost the settlement market, by improving supplies on the market;
- For regular price monitoring, in case of any cash transfer in future to facilitate informed decision making, particularly on determining the transfer value.

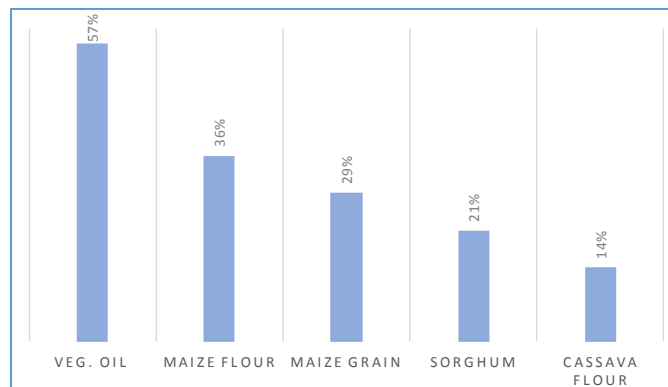


## Detailed analysis of the markets (Imvepi Market, in Point J)

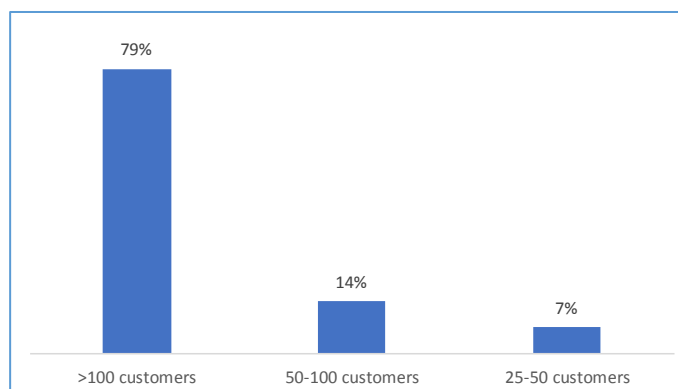
### MARKET STRUCTURE

#### MARKET CHARACTERISTICS

- The market is within the settlement; still new and existed for less than one year; 93% of the traders reported having ran the business for less than one year;
- About 1-2 kilometers to access for some zones; has about 200 stalls and more than 500 shades; no permanent structures; majority of the traders, particularly Women sell in the open and on the ground;
- Managed by a refugee (market master), who mainly oversees the enforcement of by-laws and ensures hygiene and sanitation;
- More than 1,000 traders operate in the market, mainly small scale traders and vendors; an estimated 20 and 30 traders sell beans and maize grain respectively; no wholesaler, but 2 butchers in the market;
- 70% of the traders are refugees; about 80% of the traders selling food stuffs are Women, this could be attributed to the massive sale of the in-kind food, which is mainly managed by Women at household level;
- Market is open daily, very busy with about 1,500 participants; 93% of the traders operate their business daily (5-7 days a week);



*Traders dealing in several Commodities*



*Average customers served by traders weekly*

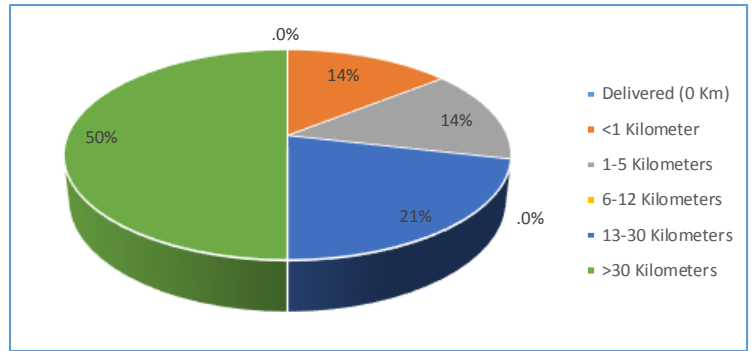


*Women vending items in Imvepi Market*

#### Commodity flow

- Half (50%) of the traders interviewed travel more than 30 KMs to buy produce, due to scarcity and low production locally;
- Maize grain, beans, Veg. oil and CSB supplied locally (in-kind food distributed by WFP). Traders buy from refugees and re-sale in the market, with the main customers being Nationals. Cassava flour is from Arua, "refugees like cassava flour so much, the demand is high, and we supply traders with cassava."
- 75-100-60 percent of the trader reportedly bought maize grain, sorghum and beans respectively from refugees, implying much of the supplies is from the in-kind food from WFP;

- Green vegetables and fresh cassava and sweet potatoes (cabbages and 'boo') is supplied by the host communities;
- Some companies (Riham and Bidco) have agents within the market, especially potential traders with enough capital. For example a truck from Riham supplies beverages 2 times a week, *"this market is very busy, population is high and it is peaking up. It attracts many traders, and in 2-3 months to come, a lot of companies will get attracted, this will supplies on the market."*
- Market has potential for expansion, *"from what I know, the market is peaking up, in 2-3 months, it will be different. Like I said, we have big companies like Riham and BIDCO supplying traders with their products, and with time, many more companies will be attracted."*



*Distance travelled by traders to buy stock*

## MARKET CONDUCT

- No weighing scales used by traders in the market; cups, heaps and bundles used as measurements;
- New entrants (traders) consult the market chairperson when setting up a business, and space is assigned to him/her.
- Commodity prices are mainly set by individual traders (74%) and collectively (27%); no trader associations and government influence on price settings in the market.



*Cups used as measurements in Markets*

## Credit availability and access

- Company agents operating in the market are supplied with items on credit, where they are expected to pay during the next delivery;
- Customers given are commodities on credit, *"Selling on credit is part of business, you only need to set your own standards for instance, I don't give credit of more than 10,000 and in 1-3 days, a customer has to pay, these are standards and my customers are used to that."*
- No trader accesses credit from financial institutions like banks, possible due the majority of the traders being refugees and Women, with no collaterals;



*Trader selling Rice a customer*

## MARKET PRICE CHANGES AND PURCHASING POWER

### Transaction costs

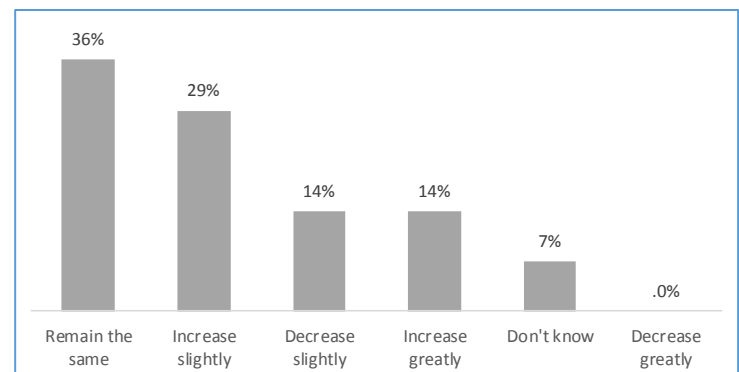
- Main costs incurred by traders is majorly transport, “vehicles are very rare and costly, most of us traders use ‘Boda-Bodas’ (Motor cycles), but also expensive. When you hire a motor cycle to Arua, you are charged about 30,000 UGX.”

### Commodity price changes

- Price data indicates higher prices for commodities in Koboko main Market, compared to settlement market (Imvepi). Maize flour and Beans average retail prices in Koboko market were significantly above the Imvepi market levels;
- 36% of the traders expect prices for commodities to remain the same, possibly due to increased supplies on the market. However, 29% anticipate a slight increase in the average retail prices;
- The main factors to price changes are scarcity, driven supplies from the harvest. 15% of the traders attributed price stability to more food assistance;
- Prices for main commodities are usually high during the lean season (March-June) and low during harvest season (August-December).



Average commodity prices in Markets



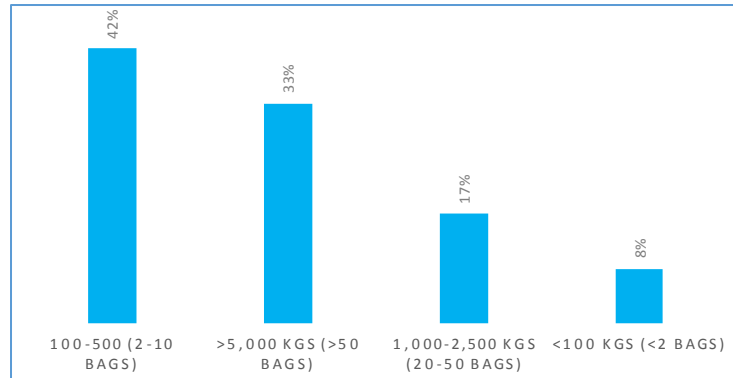
Trader opinions on future price changes

### TRADER CAPACITY TO RESPOND

- 86% of the overall traders have storage facilities. Storage capacity of 100-500 Kgs (42%) followed by >5,000 Kgs (33%). Traders use stalls as stores, and these are makeshifts and very small in sizes;

Commodity	Price change	Month											
		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Maize grain	High												
	Low												
Sorghum	High												
	Low												
Beans	High												
	Low												

Months when prices changes are experienced



*Capacity of storage capacities*

- 77% of the traders reportedly have capacity to respond within 1 week in case of increased demand, while 14% are able to respond within 2 weeks;
- 7% of the traders have no capacity to respond, they attribute this to lack of capital (57%) and difficulty to find commodities (21%). Similarly, 14% cited lack of storage as a factor;
- Inadequate capital might be a big problem, *“I can supply as much as I can, but if the demand is too high, capital would not be enough. As a trader, you there is need to have more capital to meet the demand, this is business,”*

### SAFETY AND SECURITY INCIDENTENCES

- No security threats for us traders, *“ever since the market was opened, there are just minor cases which don’t have a significant impact on the business. We don’t have a guard, but the security is good, do you see my shop, not a permanent structure and I use tarpaulin to cover my shop but I also sleep inside.”*

### CHALLENGES FACED BY TRADERS

- Transport costs are high, *“the market is remote, and vehicles operating on these routes are rare. So, we hire motor cycles, which charge us about 30,000 to Arua.”*
- Low purchasing power among refugees;
- No selling space, open space, when it rains, no business.



*Vendors selling in the open*

### IMPACT OF FOOD AID ON THE MARKETS

- Improved supplies on the market, *“food is cheap, and everyone can afford, including host communities. Farmers don’t cultivate a lot of food, so, they heavily depend on the in-kind food sold in the market.”*

**Settlement market price data as of 17<sup>th</sup> August, 2017**

S/n	Commodity	Unit	Imvepi Market			Average
			Trader 1	Trader 2	Trader 3	
1	Maize grain	Kg	1,500	1,500	1,500	1,500
2	Maize flour	Kg	2,500	2,000	2,000	2,167
3	Rice (Pakistan)	Kg	3,400	3,500	3,400	3,433
4	Wheat flour	Kg	2,900	3,000	2,500	2,800
5	Cassava flour	Kg	1,800	2,000	1,800	1,867
6	Cassava-fresh	Kg	1,000	1,000	1,000	1,000
7	Sweet potatoes	Kg	1,000	1,000		1,000
8	Beans (Nambale)	Kg	2,500	2,500	2,000	2,333
9	Beans (Yellow)	Kg	3,000			3,000
10	Vegetables (Greens)	Kg	1,000	1,000	1,000	1,000
11	Vegetables (Onions)	Kg	3,500	3,000	3,500	3,333
12	Irish Potatoes	Kg	2,000	2,000		2,000
13	Beef	Kg	9,000	9,000		9,000
14	Fish	Kg	12,000	12,000		12,000
15	Chicken	Kg	18,000	20,000		19,000
16	Cooking Oil	Kg	4,500	5,000	4,500	4,667
17	Sugar	Kg	5,000	5,000		5,000
18	Millet Flour	Kg	1,800	1,800		1,800
19	Sorghum	Kg	1,000			1,000
20	CSB	Kg	1,000			1,000
21	Salt	Kg	1,200	1,200		1,200

*Average commodity prices in Imvepi Market*



World Food Programme

# Summary of Market Assessments June – September 2017

**Bidibidi, Palabek, Koboko, Palorinya, Imvepi, Kiryandongo, Rhino  
Camp and Adjumani/Pakelle Refugee Settlements**



## Settlement: Bidibidi Settlement

Date of Data collection: 2<sup>nd</sup> -3<sup>rd</sup> September 2017

### Markets visited

Six markets were visited including one market from each zone (Zone 1- Bidi-bidi reception market; Zone 2 – Pajulu Market; Zone 3 – Konyokonyo market; Zone 4 – Bolomoni market; and Zone 5 – Ariwa market) and Yumbe market.

### Market Functionality:

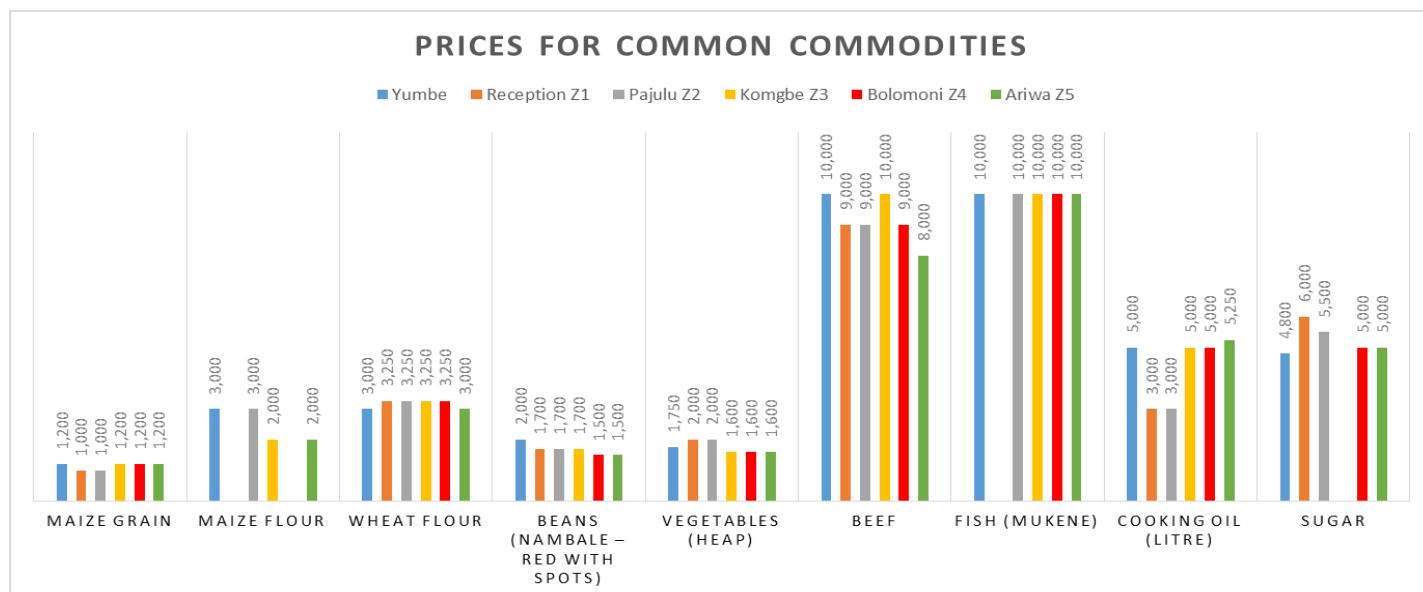
#### Traders:

- About 300 retail traders in settlement markets around the five zones (Reception market – 45 traders; Pajulu Market - 30 traders; Konyokonyo market – 70 traders; Bolomoni market – 50 traders; and Ariwa market – 85 traders)
- About 350 traders around Yumbe Town Market that can be mobilized to supply food to the settlement.

**Food Availability:** Food commodities are available on the market though in small quantities.

**Supply:** 25% and 50% of the traders in Bidibidi settlement and Yumbe town respectively can respond to increased demand in 1 week.

**Prices:** There is no big difference in prices across markets accessed by refugees.



### Key Issues

- Traders have limited capital especially at settlement level.
- Food assistance from WFP is a major source of maize, sorghum, beans and vegetable oil sold mainly in settlement markets.
- Poor road network and severe weather (rains) affecting movement of food commodities

### Action Points

- Need to mobilize traders from Yumbe market, Koboko and Arua to supply food commodities to the settlement during the period when refugees receive cash transfers.

## Settlement: Palabek Settlement

Date of Data collection: 2<sup>nd</sup> -3<sup>rd</sup> September 2017

### Markets visited

Three markets were visited of which 2 were in the settlement (i.e. Base camp and Jerusalem) and Palabek Kal market.

### Market Functionality:

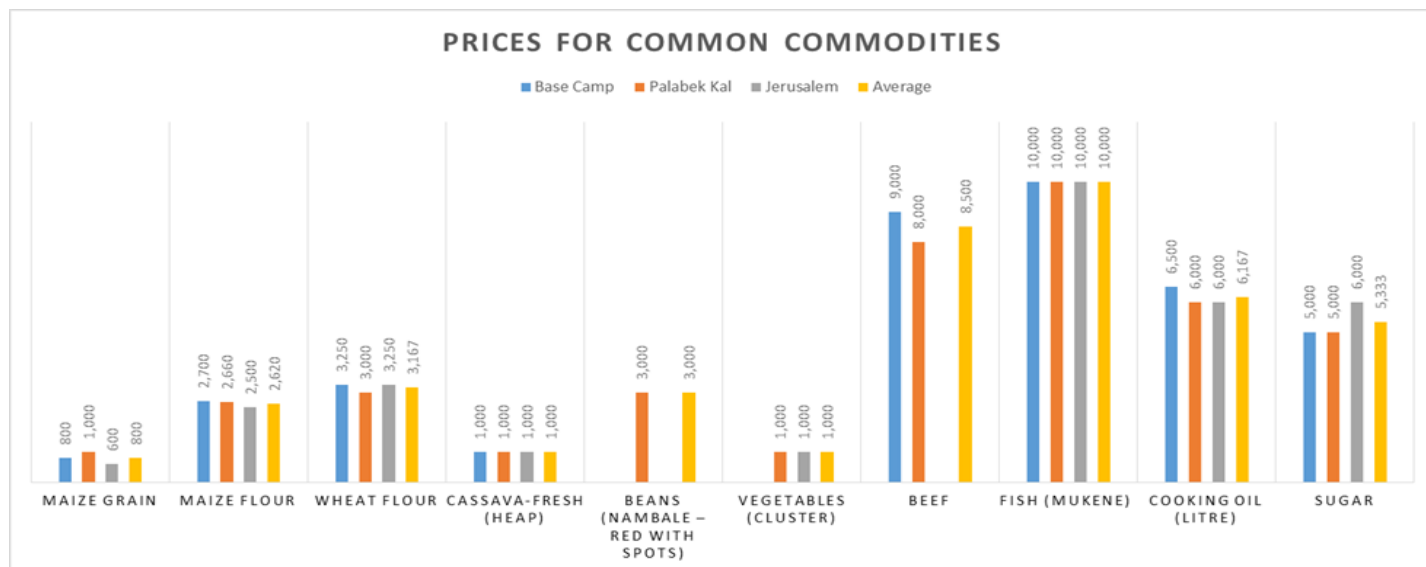
#### Traders:

- The markets in the settlement is very informal with limited wholesalers and retailers. Over 95% of the businesses are small scale and more than half started less than a year ago.
- Base camp has about 70 stalls (some traders selling in the open without any shelter), Jerusalem has about 20 and Palabek Kal has 45 market stalls and 20 shops selling food commodities.

**Food Availability:** Food commodities are available on the market though in small quantities. Commodities available on the market include maize grain/flour, rice, wheat flour, cassava, sweat potatoes, beans, silver fish, cooking oil and sugar.

**Supply:** Most traders get their supplies from other districts – Gulu, Kitgum and Mbale. About 60% of the traders interviewed confirmed that they can increase supply in one week in case demand doubled but limited capital cited as a major challenge.

**Prices:** Traders set own prices but depend on seasonality and availability of food commodities on market.



### Key Issues

- Market not well developed.
- Limited capital among the traders.

### Action Points

- Need to mobilize traders in Gulu, Kitgum and Pader to supply food as we plan to implement cash transfers.



## Settlement: Koboko Settlement

Date of Data collection: 15<sup>th</sup> August, 2017

### Background:

- Five (5) markets are accessed by the refugees, namely; Koboko main market, Lodonga Market, Ombokodo, Commedago & Mengo). 2 markets (Koboko Main market and Lodonga are commodity markets, well established, and fully functional), Commedago is purely a livestock market;
- Koboko Main market operates daily, while Lodonga Market operates two days (Tuesday & Thursday); Koboko Main Market and Lodonga Markets are about 10Kms and 8Kms respectively from the settlement; Both markets, have permanent and makeshift structures, and are managed by government (Market masters/chairpersons).

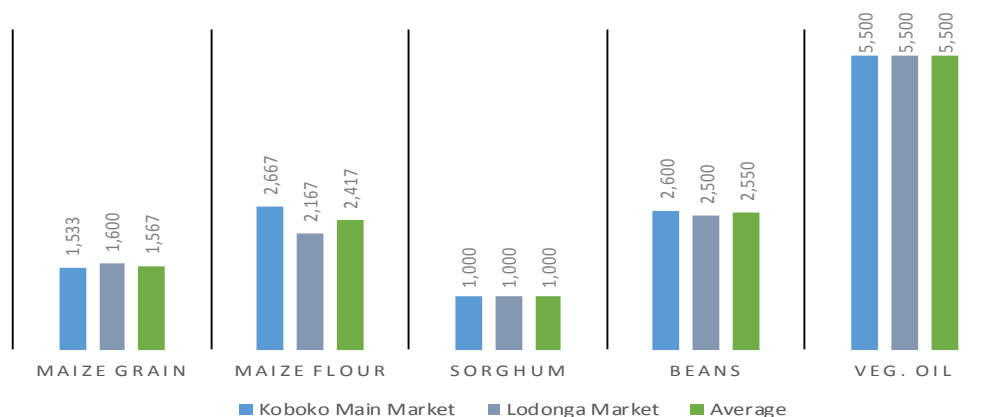
### Market functionality:

**Koboko Main Market:** About 1,000 traders in the market; market is very busy with nearly 1,500 persons transacting in the market; Commodities in the market include; cereals (Maize grain, sorghum, rice, millet), pulses, veg. oil, vegetables ( all kinds), tubers (all kinds); Source of supplies: Arua, Masindi, Kiryandongo, Hoima and Kampala; 100% of the traders reported that they travel more than 30 KMs; 67% able to respond within 1 week; with all traders reporting storage capacity of 20 bags and above.

**Lodonga Market:** About 500-1,000 traders, especially during market days (Tuesday & Thursday), with nearly 2,000 participants during market days; traders from near districts (Arua, Moyo and Yumbe) come to trade; Commodities available in the market; Supplies from Arua, Koboko, Masindi, Nebbi, and Hoima; 66% able to increase stock within 1-2 weeks.

### Market prices:

- No observed difference in the average retail prices for nearly all commodities. However, the average price for maize flour was slightly higher in Koboko main market, due to high demand; 67% of traders in Lodonga market expect a slight decrease in prices in 3-6 months, compared to 33% in Koboko main market;



Commodity average prices

### Action points:

- Need for close monitoring of the market prices, in both markets.

## Settlement: Palorinya Settlement

Date of Data collection: 16<sup>th</sup> August, 2017

### Background:

- Two (2) commodity markets (Moyo main market, and Konyokonyo) accessed by refugees, with both markets operating daily; other markets accessed by refugees are Lefori Market (Yumbe district); other small markets are reportedly emerging, but with small volumes of commodities; Moyo main market is about 10KMs from the settlement, Konyokonyo Market is within the settlement, but distance vary according to zones;
- Moyo market has both permanent and makeshift structures, while Konyokonyo market has mainly makeshifts.

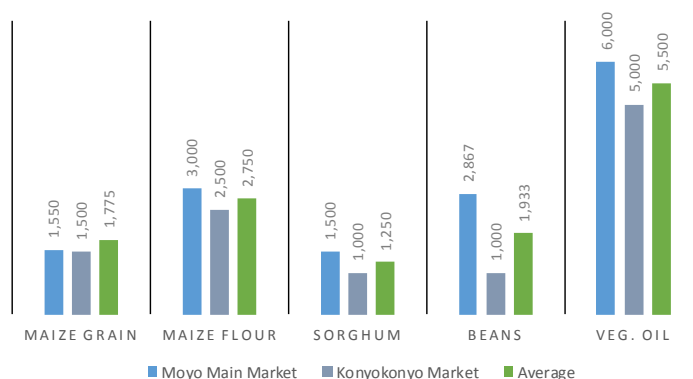
### Markets visited:

**Moyo Main Market:** 500-1,000 traders; market too busy with more than 1,000 participants, 33% serve more than 100 customers weekly; big companies such as BIDCO and TESCO have agents within the market and town; Sources of supplies include; Mbale, Hoima, Masindi, Gulu, and Kampala. Maize grain and beans are mainly from Hoima and Masindi; 56% of the traders have the capacity to increase stock within 1 week; 60% reportedly have storage capacity of more than 50 bags.

**Konyokonyo Market:** 300-500 traders in the market; about 500-1,000 participants; 1 wholesaler; majority of traders deal in NFIs; commodity traders sell small volumes, due to ongoing in-kind food distribution; in-kind food in the market (Cereals, pulses and Veg. oil); massive sale of in-kind food to external buyers; government plans to relocate the market for easy management, dates unknown; increased fears to re-stock, due to uncertainties regarding market re-location; source of supplies are; Moyo town, Arua, Mbale, and Koboko; 75% have capacity to increase stocks within 1 week.

### Market prices:

- Average retail prices are higher in markets outside the settlement (Moyo Market), due to high demand; 50% of the traders in Konyokonyo anticipate a slight price increase in 3-6 months, due to low supplies.



Commodity Market prices

### Action points:

Need for engagement of traders in Moyo Main Market so that they can boost Konyokonyo market; need for market price monitoring.

## Settlement: Imvepi Settlement

Date of Data collection: 17<sup>th</sup> August, 2017

### Background:

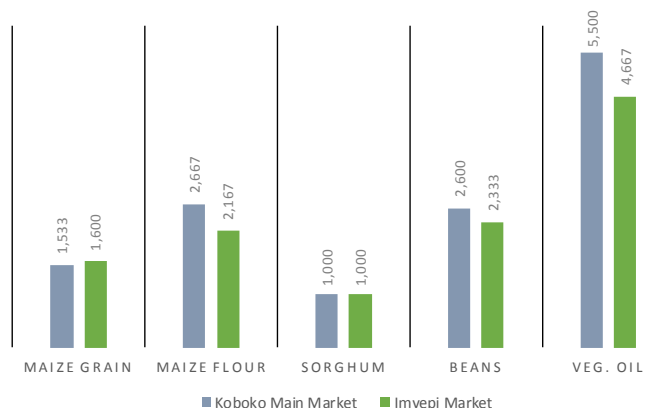
- More than 1,000 traders; market within settlement and distance ranges between 1-2 KMs depending on the zone; open daily;
- Busy with nearly 1,500 participants; 79% of the traders reportedly serve more than 100 customers weekly;
- No wholesaler, only company agents; Riham and Bidco have established agents within the settlement, with deliveries made 1-2 times a week; Agents supplied on credit and make payments in the next delivery;
- With the thriving business, big companies are likely to get attracted to the market;

### Market functionality:

- All commodities in the market, but in small volumes due to in-kind food distribution; traders reportedly can't sell commodities due to low demand; in-kind food sold in the market (Maize grain, pulses and veg. Oil); external traders buying maize grain from beneficiaries;
- Supplies mainly from Koboko, Arua, Hoima and Masindi;
- Cassava flour is one of the main preferred commodity;
- 80% of the traders serve more than 100 customers weekly; 93% have the ability to respond in 1-2 weeks;
- 86% have storage, with a capacity of 2-10 bags (42%), and >50 bags (33%);

### Market prices:

- Average retail prices for maize flour in Koboko Main Market, were higher compared to Imvepi market, due to low demand in the settlement following the ongoing in-kind food distribution;
- 36% expect price to remain stable in 3-6 months, while 29% anticipate a light increase in the average price;
- Commodity prices are set by individual traders (71%), and jointly with other traders (29%).



*Average commodity prices*

### Action points:

- Need to engage external traders in Koboko and Arua; and close monitoring of the market prices.

## Settlement: Kiryandongo Settlement

Date of Data collection: 6th June 2017

### Markets visited

Two markets were visited in Kiryandongo settlement i.e. Bweyale and Mulokoni markets.

### Market Functionality:

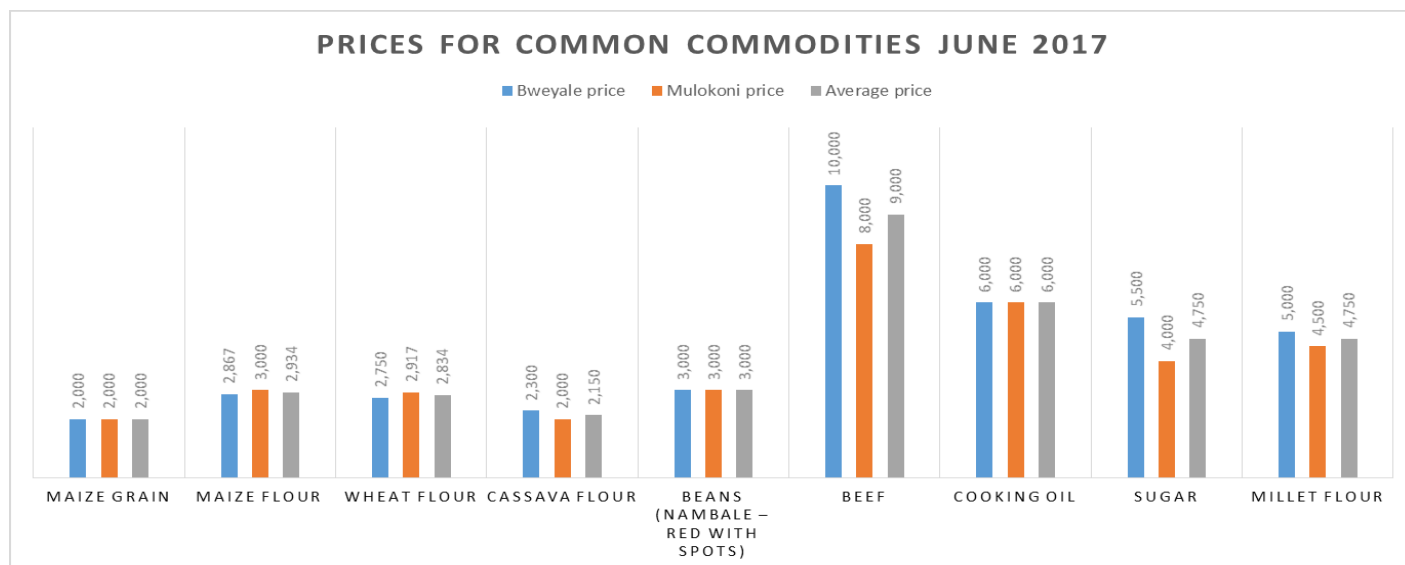
#### Traders:

- Bweyale being the main market with 66 stalls and over 600 traders operating including refugees.
- On average Bweyale serves approximately 60,000 customers a week.

**Food Availability:** A variety of food commodities are sold in the markets including fresh and dried foods. Some food commodities such as maize, potatoes, cassava and vegetables are obtained from within the refugees and host community while others for example, rice and vegetable oil are brought by traders from other districts.

**Supply:** Most traders get their supplies from farmers within Kiryandongo, other district districts – Masindi, Kampala, Gulu and Lira among others. Traders around Bweyale market have storage facilities and 54% reported having capacity to respond within a month in case demand doubled.

**Prices:** Prices for beans and maize are expected to be high between March and June and October and low between July and September and between December and February.



### Key Issues

- Market not well developed.
- Price for maize is expected to be relatively low during this period due to harvest.

### Action Points

- Although Bweyale market is well established and currently maize being available in the area, there is need to mobilize traders around the settlement, inform and prepare them for the upcoming business opportunities as a result of the cash transfer.

## Settlement: Rhino camp Settlement

Date of Data collection: 7th June 2017

### Markets visited

Three markets were visited in Rhino Camp settlement i.e. Ofua3 and Ocea markets operate daily while Matangatia market is functional only one day a week (Tuesday).

### Market Functionality:

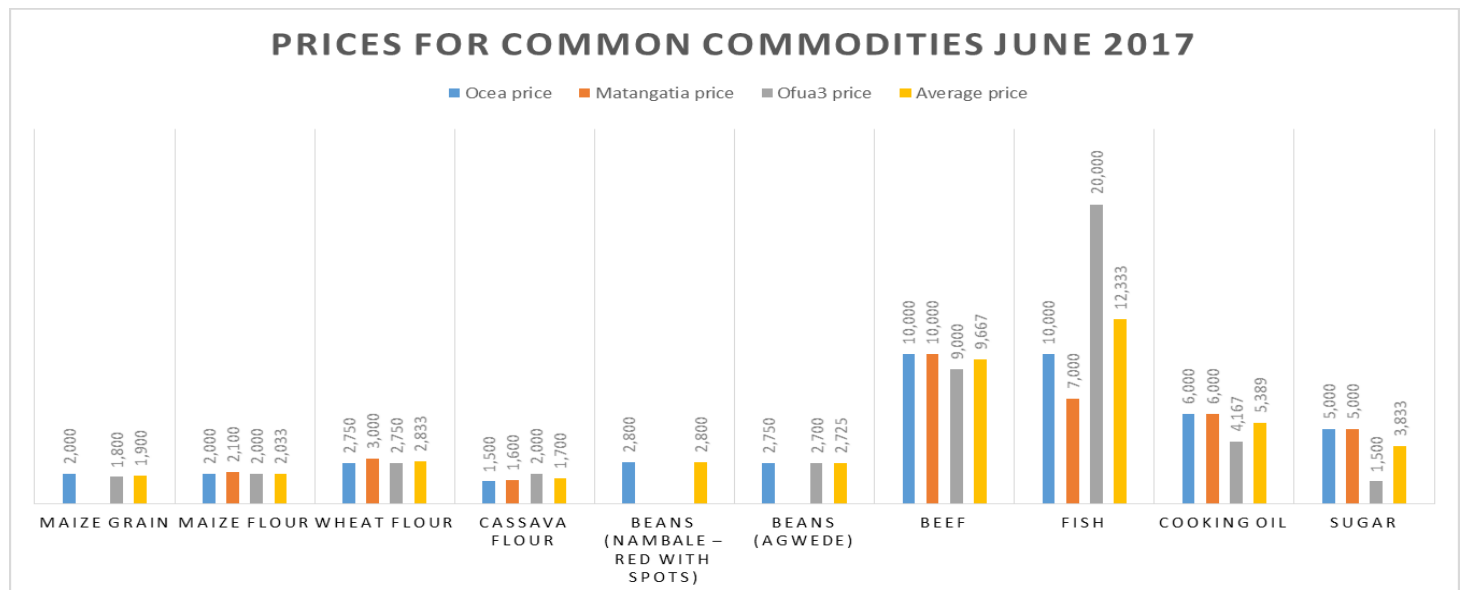
#### Traders:

- Most of the traders are retailers with only two wholesalers in Ofua3 market. Approximately 80 traders operate in Ocea market and about 25 retailers in Ofua3 with several vendors.

**Food Availability:** Common commodities sold included beans, cassava flour, fresh cassava tubers, Silver fish (Mukene), vegetable oil, maize flour, tomatoes, egg plants and other green vegetables.

**Supply:** One of the key sources for the traders selling maize grain, beans and vegetable oil was food aid and any pipeline breaks lead to shortage on the market. For other sources, traders have to travel over 30km to get supplies incurring transport of over UGX 20,000 mainly to Arua, Moyo and Yumbe.

**Prices:** Prices for beans and maize are expected to be high between May and July and low between September and November.



### Key Issues

- Markets are not well developed, isolated and composed of few traders with limited capital.
- Traders in Ofua3 market did not have storage facilities and majority (80%) did not have capacity to respond in case of increased demand.

### Action Points

- There is need to mobilize more traders from Arua, Moyo, Yumbe, Koboko and any other appropriate areas of functional markets to be able to supply food to Rhino Camp settlement otherwise, beneficiaries might get the money but fail to find food on the market to buy.

## Settlement: Adjumani/Pakelle Settlement

Date of Data collection: 8th June 2017

### Markets visited

Three markets were visited in Adjumani/Pakelle settlement i.e. Nyumanzi, Awindiri and Adjumani main markets.

### Market Functionality:

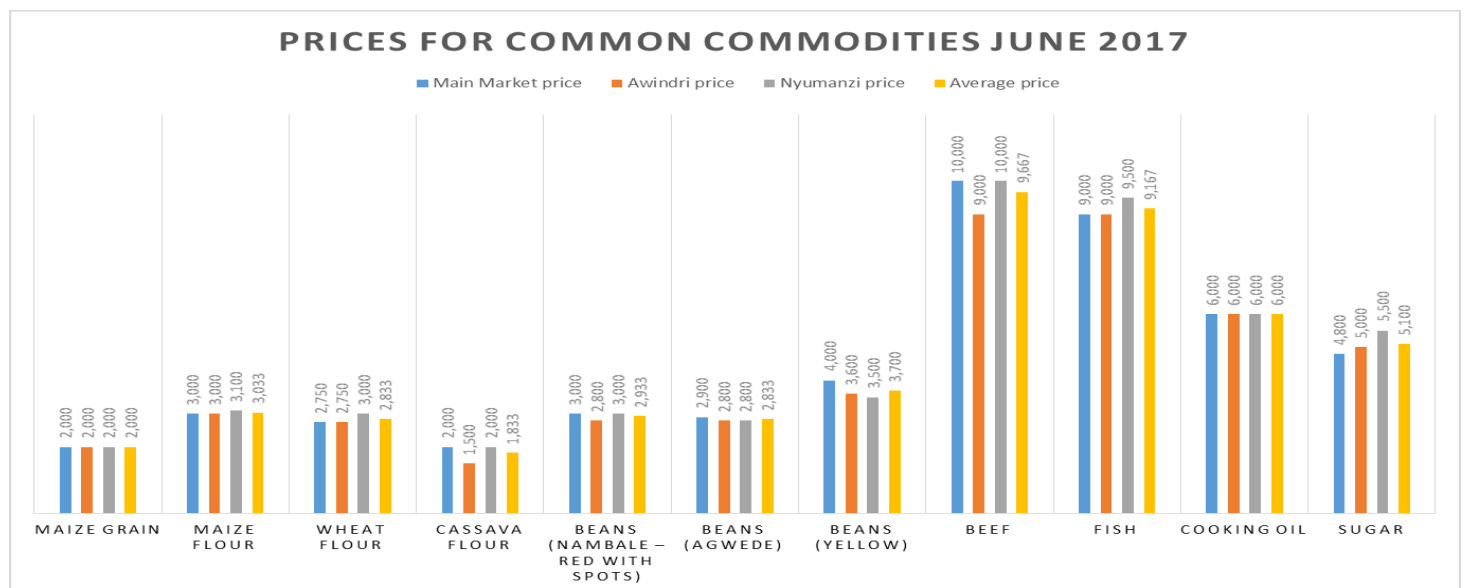
#### Traders:

- The three markets (Awindiri, Nyumanzi and Adjumani main market) are fully functional with more than 100 traders in each market. In Nyumanzi, more than 2,000 customers access the market daily.

**Food Availability:** Common food commodities sold included maize, beans, cassava flour, sorghum, fresh cassava tubers, Silver fish (Mukene), vegetable oil, tomatoes, rice, Irish potatoes and other green vegetables.

**Supply:** The volumes of food stuffs have reportedly increased across the settlement markets as traders from other areas like, Sudan, Gulu, Kiryandongo and Arua have embraced the region.

**Prices:** Traders expected prices for sorghum and maize to go down in July, August, and September due to harvest.



### Key Issues

- The markets around Adjumani/Pakelle settlement are functional with over 100 established traders/businesses in each market and operational on a daily basis.
- However, security was mentioned as a challenge at night in Awindiri and Nyumanzi markets.

### Action Points

- Majority of the traders in all markets around Adjumani/Pakelle settlement indicated that they have storage facilities (over 2.5MT) and capacity to respond in case demand doubled within 1 week.
- Need to mobilize and inform traders in Adjumani main Market, Nyumanzi and Awindiri markets to restock in preparation for the expected increase in demand.



**World Food  
Programme**

**DECEMBER 2017**

# **MARKET ASSESSMENT REPORT**

## **NAKIVALE, ORUCHINGA, RWAMWNAJA, KYAKA II & KYANGWALI SETTLEMENTS**

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**ANALYSIS MONITORING & EVALUATION UNIT**

**WORLD FOOD PROGRAMME - UGANDA**

**1/25/2018**

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## Introduction

Analysis, Monitoring & Evaluation (AME) Unit conducted a market assessment in Nakivale, Oruchinga, Rwamwanja, Kyaka II and Kyangwali to understand the functionality of markets in these settlements and their capacity to support cash based transfers.

Nakivale and Oruchinga settlements totally depend on in-kind food assistance and therefore, this market assessment was to ascertain the feasibility of introducing cash transfers. For Rwamwanja, Kyaka II and Kyangwali the major reason was to understand the current state of markets and the possibility to expand cash transfers in some of these settlements.

The assessment started with a training of Mbarara Sub office staff (ANYIK Francis, Johnson MBOGHA, Andrew ANDAMA, Miriam EGAU and Charles OKWAKOL on 19<sup>th</sup> December and later followed by data collection in the five settlements starting 20<sup>th</sup> -22<sup>nd</sup> December 2017.

Key informant interviews with Camp Commandants, refugee leaders and trader representative were conducted in addition to the 57 trader surveys collected across all settlements. Market observation, transact walks and price data collection were some of the methods used to understand the functionality of the markets.

## Nakivale Settlement

### *Key Highlights*

1. Nakivale has a well-established network of markets within and outside the settlement where refugees can buy all they need. There is a market at Base Camp II, small trading centers with shops across the settlement and Kityaza that has a weekly market that operates every Tuesday. The main trading centers around Nakivale settlement include; Sangano, Kigali 2, New Congo, Somalie, Kabazana and Nyarugugu. Also final distribution points (FDPs) are temporary markets during distribution days. The markets outside the settlement accessed by refugees include, Kabingo, Rugaga and Mbarara.
  2. Main food commodities available on the market include, maize grain and flour, beans, sorghum, millet, rice, cabbage, onions, tomatoes, veg oil, sweet potatoes, Irish potatoes, cassava and bananas. Majority of the retail traders in the settlement said that they travel a distance between 1 and 5km to purchase their stocks. There are wholesale shops within the settlement and their also trucks that ferry good to the settlement.
  3. No restrictions for traders to operate in the market although traders have to register at a small fee of UGX 5,000.
  4. Some traders have access to loans through SACCOs and also offer credit to some known and trusted customers.
- The markets around the settlements are far better than the markets in some settlements that are already receiving cash transfers. In total the whole settlement has about 528 traders and 50% indicated that they serve about 50 customers a week while the other half can serve over 100 customers. **Therefore, the markets around the settlement have capacity to serve approximately 50,000 customers a week which is a good platform for the introduction of cash transfers.**

- One of the key challenges highlighted by traders is low purchasing power and this can be improved by introduction of cash transfers hence increasing disposable income for the refugees.

### *Detailed Market Analysis (Nakivale)*

<b>Market Structure</b>	
<p><b>Market Characteristics</b></p> <ul style="list-style-type: none"> <li>• Nakivale has a well-established network of markets within and outside the settlement where refugees can buy all they need. There is a market at Base Camp II, small trading centers with shops across the settlement and Kityaza that has a weekly market that operates every Tuesday. The main trading centers around Nakivale settlement include; Sangano, Kigali 2, New Congo, Somalie, Kabazana and Nyarugugu. Also final distribution points (FDPs) are temporary markets during distribution days. The markets outside the settlement accessed by refugees include, Kabingo, Rugaga and Mbarara.</li> <li>➤ Kityaza market has a few semi-permanent structures with shops and a weekly market every Tuesday. Over 500 traders come to the market every Tuesday with food and non-food items which are purchased by refugees.</li> <li>➤ Sangano trading center has about 100 retail shops and 50 wholesalers. It is the main business hub of the settlement where traders from different trading centers within the settlement get their goods. Shops are open daily.</li> <li>➤ Somali trading center has semi-permanent structures with about 150 retail shops and 5 wholesalers. Shops are open daily.</li> <li>➤ Nyarugugu located behind Somali area has semi-permanent structures with about 10 retail shops. Open daily but not well stocked.</li> <li>➤ New Congo also has semi-permanent structures with about 70 retail shops and 10 wholesalers.</li> <li>➤ Kigali trading center has semi-permanent structures with about 50 retailers with 2 wholesalers.</li> <li>➤ And lastly Kabazana has semi-permanent structures with about 80 retailers and 1 wholesaler.</li> <li>➤ The businesses visited had been established between 1 and 3 years ago.</li> </ul>	<p><b>Commodity flow</b></p> <ul style="list-style-type: none"> <li>• Main food commodities available on the market include: Maize grain and flour, beans, sorghum, millet, rice, cabbage, onions, tomatoes, vegetable oil, sweet potatoes, Irish potatoes, cassava and bananas.</li> <li>• Retail traders selling maize flour and beans had stocks on average 20Kg and 750Kg respectively.</li> <li>• The assessment was done during the harvest time for beans and traders indicated that the stock they had was from farmers within the settlement.</li> <li>• During the assessment, a number of stores were seen with stocked maize flour and beans. Farmers were harvesting and cleaning up the beans.</li> <li>• Majority of the shops visited had vegetable oil and the main sources were, traders from outside the settlement and food assistance received by households.</li> <li>• Salt was also readily available with main sources being traders from within and outside the settlement.</li> <li>• Also important to note is that majority of the traders buy grain (maize, sorghum &amp; millet) and take it for milling into flour at the milling machines around the settlement.</li> <li>• Different types of non-food items were sold across the settlement which include cosmetics, shoes, clothes and household domestic utensils.</li> <li>• Majority of the retail traders in the settlement said that they travel a distance between 1 and 5km to purchase their stocks. There are wholesale shops within the settlement and their also trucks that ferry good to the settlement.</li> </ul>

<b>Market Conduct</b>	
<b>Market Regulations and Policies</b> <ul style="list-style-type: none"> <li>No restrictions for traders to operate in the market.</li> <li>Traders register with the chairman of the zone/cell and pay registration fee of UGX 5,000.</li> </ul>	<b>Credit availability and access</b> <ul style="list-style-type: none"> <li>Credit is extended to some known and trusted customers. However, some customers don't want to pay back.</li> <li>The payback period ranges from one week to 2 months depending on the relationship and knowledge of the customer.</li> <li>Some traders access loans through SACCOs.</li> </ul>
<b>Perceived Impact of Food Assistance on Markets</b> <ul style="list-style-type: none"> <li>When refugees receive food aid, they sell maize grain, beans, CSB and vegetable oil and buy other things they want.</li> </ul>	
<b>Market Prices and Purchasing Power</b>	
<b>Transaction Costs</b> <ul style="list-style-type: none"> <li>Major transaction costs are: rent, licenses, taxes and transport incurred by traders in the market.</li> <li>➤ License is UGX 20,000 per year per for shops.</li> <li>➤ Rent UGX 40,000 – 70,000.</li> <li>Also some mentioned loading and off-loading costs that are included in the selling price of the commodity. Some traders load and off-load their commodities that are not bulky.</li> </ul>	<b>Changes in volumes of sales</b> <ul style="list-style-type: none"> <li>➤ The volume of sales are expected to increase because of the Christmas season. Otherwise sales are always low due to low purchasing power of the buyers. The introduction of cash would boost the purchasing power of the refugees.</li> </ul> <b>Prices Prospects</b> <ul style="list-style-type: none"> <li>Prices were expected to remain relatively stable during the next coming 3-6 months. This is because half of the interviewed traders expected prices to decrease slightly while the other half expected prices to increase slightly.</li> <li>The major reason for why prices would remain relatively stable is because of the harvest.</li> <li>Maize and sorghum prices will reduce starting from January to March. Prices will increase starting April to June 2018.</li> <li>Beans prices were low in December and will begin to increase from January up to April 2018.</li> </ul>
<b>Market Response capacity</b>	
<b>Capacity to supply food timely</b> <ul style="list-style-type: none"> <li>In total the whole settlement has about 528 traders and 50% indicated that they serve about 50 customers a week while the other half can serve over 100 customers. Therefore, approximately 50,000 customers can be served a week.</li> </ul>	<b>Major constraints</b> <ul style="list-style-type: none"> <li>There are small profit margins from selling the commodities.</li> <li>Low purchasing power among the refugees.</li> <li>Limited capital for the small scale traders.</li> </ul>

<ul style="list-style-type: none"> <li>• In addition, Kityaza weekly market every Tuesday with over 500 traders can support increase in supply in case of increased demand.</li> <li>• Majority of the traders were using their shops as storage facilities with capacity ranging from 2 bags to 2MT (for 5 wholesale traders)</li> <li>• Half of the traders indicated that they have capacity to increase supply within one week in case demand doubled while the other half is able to do it in two weeks.</li> <li>• However limited capital was highlighted by small scale traders as a hindrance to increase supply on time.</li> </ul>	<p><b>Safety and Security</b></p> <ul style="list-style-type: none"> <li>• Traders reported incidences of robbery without violence at the shops/stall especially at night due to temporally structures.</li> <li>• Traders proposed construction of permanent structures and deployment of police at night to reduce on crime incidences.</li> </ul>
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## Oruchinga Settlement

### Key Highlights

1. There are two main markets that are accessed by refugees and nationals in Oruchinga settlement i.e. Kajaho and Kalerema (Dubai). Kajaho is located along the main road with accessibility to bigger towns like Mbarara and the Tanzania border.
  2. Majority of the traders interviewed (56%) serve between 50-100 customers a week. Therefore, Kajaho trading center alone with about 100 shops can serve between 5,000 – 10,000 people a week.
  3. Main food commodities available on the market include: Beans, maize grain, flour, sorghum, millet, rice, cabbage, onions, tomatoes, vegetable oil, sweet potatoes, Irish potatoes, cassava and Bananas.
  4. No restrictions for traders to operate in the market although traders have to register at a small fee of UGX 5,000.
  5. Some traders have access to loans through SACCO, Micro finance institutions and Banks. Traders also offer credit to some known and trusted customers.
  6. Sales are always low due to low purchasing power of the buyers. The introduction of cash would boost the purchasing power of the refugees and stimulate market development as well as production for the host community.
- The existing markets (Kajaho and Kalerema) are well established markets with over 100 traders and more accessed during the weekly market days and are able to supply food commodities to beneficiaries in case they receive cash transfers. The markets are located along the main road and this can facilitate movement of food commodities in case of scarcity.
- **Important to note is that gradual introduction and expansion of cash transfers is the best strategy as it gives markets ample time to grow concurrently with the increase in demand.**

## **Market Structure**

### **Market Characteristics**

- There are two main markets that are accessed by refugees and nationals in Oruchinga settlement i.e. Kajaho and Kalerema (Dubai).
- Kajaho market has over 100 permanent structures with general merchandize and food stores. The trading centre also has a weekly market every Thursday of the week with traders from Mbarara, Nakivale, Kabaale, Ntungamo and as far as Tanzania. On Thursday the market has over 500 traders selling different merchandise and food commodities.
- Kalerema market operates on Mondays and basically in the evening 4:00pm onwards. Mostly temporary /makeshift with no permanent structures on ground. More than 100 traders participate in this market.
- On market days, over 3000 and 1000 people access Kajaho and Kalerema (Dubai) markets respectively.
- All the businesses visited in Oruchinga settlement had been established at least a year back.

### **Commodity flow**

- Main food commodities available on the market include: Beans, maize grain, flour, sorghum, millet, rice, cabbage, onions, tomatoes, vegetable oil, sweet potatoes, Irish potatoes, cassava and Bananas.
- There are about 10 stores of produce dealing in maize grain, beans and sorghum in Kajaho trading center.
- Traders dealing in maize grain on average had 125Kg in stock. The source varied from farmers within the settlements (refugees), farmers outside the settlement (nationals) and traders from outside the settlement.
- Many traders had maize flour on average 350Kg in stock and the main source was traders from outside the settlement.
- A few traders had sorghum and the main sources were farmers both refugees and nationals.
- 45% of the interviewed traders were selling beans and the main source was farmers from within (refugees) and outside (nationals) the settlement. On average each trader had close to 3MT of beans in stock since it was harvest season.
- Almost all retail shops had salt and vegetable oil and the main source was traders from outside the settlement.
- Also 67% of the traders interviewed had millet flour and they mostly purchased grain from famers (refugee & nationals) and milled at grinding machines. Others buy millet flour directly from traders coming from outside the settlement.
- All traders interviewed in Oruchinga settlement said that they travel over 30km (mostly Mbarara and the Tanzania Border) to purchase their stocks.

## **Market Conduct**

### **Market Regulations and Policies**

- No restrictions for traders to operate in the market except for those dealing in animals that need animal permits.
- The weekly market is tendered out to private individuals who manage and collect market dues.
- Traders register with the chairman and pay registration fee of UGX 5,000.

### **Credit availability and access**

- All traders interviewed admitted that they offer credit to some known and trusted customers.
- The payback period ranges from one to four weeks depending on the relationship and knowledge of the customer.
- Some traders access loans through SACCO, Micro finance institutions and Banks.

## Perceived Impact of Food Assistance on Markets

- When refugees receive food aid, they don't buy maize grain, flour and beans. Some sell maize grain, beans and vegetable oil.

## Market Prices and Purchasing Power

### Transaction Costs

- Major transaction costs are: rent, licenses, taxes and transport incurred by traders in the market.
- Also some mentioned loading and off-loading costs that are included in the selling price of the commodity. Some traders load and off-load their commodities that are not bulky.

### Changes in volumes of sales

- The volume of sales are expected to increase because of the Christmas season. Otherwise sales are always low due to low purchasing power of the buyers. The introduction of cash would boost the purchasing power of the refugees and stimulate market development as well as production for the host community.

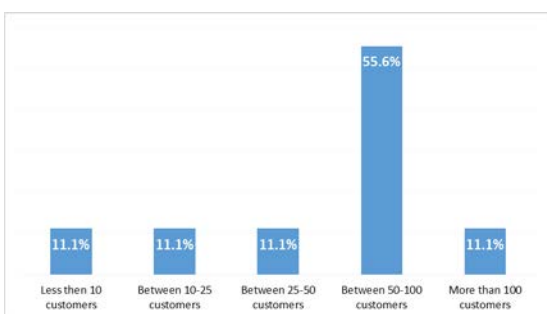
### Prices Prospects

- The prices will reduce during harvest periods. Maize and sorghum prices will reduce starting from January to March. Prices will increase starting April to June 2018.
- Beans prices are low in December and will begin to increase from January up to April 2018.
- Some of the interviewed traders expected prices to decrease slightly while the other half expected prices to increase slightly due to divergent views on quality of harvest.

## Market Response capacity

### Capacity to supply food timely

- Majority of the traders interviewed (56%) serve between 50-100 customers a week. Therefore, Kajaho trading center alone with about 100 shops can serve between 5,000 – 10,000 people a week.



### Major constraints

- There are small profit margins from selling the commodities.
- There is low turn-over due to low purchasing power.
- Many customers wanting to buy on credit
- Theft especially night break-ins.

### Safety and Security

- Traders reported incidences of robbery without violence at the shops/stall especially at night due to temporally structures.
- Traders proposed deployment of police at night to reduce on crime incidences.

<ul style="list-style-type: none"> <li>• The weekly markets on Monday and Tuesday are able to supplement the daily market in shops across the settlement in case of shortage.</li> <li>• Majority of the traders reported having storage facilities with 1,000 -5,000kg capacity. A few had stores that can accommodate more than 5MT.</li> <li>• 78% of the traders indicated that they have capacity to increase supply within one week in case demand doubled while the 22% are able to respond in two weeks.</li> <li>• Limited capital and transport were highlighted by small scale traders as key hindrance to increase supply on time.</li> <li>• There are more than two grain millers in the market. They charge UGX 150 per kg of milling and each machine has a capacity to mill 600kg per day. The millers indicated that they have capacity to install additional machines in case of increased demand.</li> </ul>	
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## Rwamwanja Settlement

### *Key Highlights*

1. The introduction of cash transfer in Rwamwanja settlement stimulated market development in different parts of the settlement. In addition to Kataryeba the main market of the settlement, small shops have come up within small centers in the settlement i.e. St. Michael, Mahane, Mahenga, Nkoma, Mukatafari, Kyebucumbe and Omukasisa.
  2. The major challenge now reported by traders is competition among themselves and many new businesses have come up as a result of the cash transfers.
  3. Main food commodities available on the market include: Maize grain and flour, beans, sorghum, millet, rice, wheat, cabbage, onions, tomatoes, vegetable oil, meat, drinks, sweet potatoes, Irish potatoes, cassava and bananas.
  4. No restrictions for traders to operate in the market. New entrants have to pay registration fee of UGX 10,000.
  5. Some traders access loans through SACCOs, Centenary bank and Stanbic bank. Traders also offer credit to some known and trusted customers.
  6. The maize grain and beans sold on the market are grown locally by both the refugees and nationals. Therefore, current demand as a result of cash transfers has created market for the locally produced foods.
- Kataryeba market had developed so fast and the competition is very high. Businesses have reached a point where demand is far less than the current supply. Traders were asking if more refugees are enrolled on cash to save their businesses.

- Market development has reached its peak and the profit margin is too little to an extent that some business will have to collapse due to competition. **Expansion of cash transfers is ideal for Rwamwanja if the current level of market development is to be sustained.**

### *Detailed Market Analysis (Rwamwanja)*

## **Market Structure**

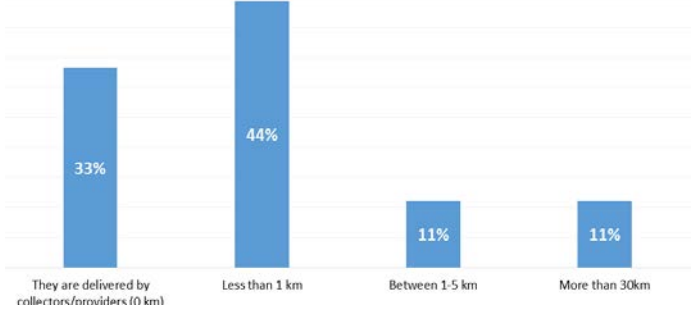
### **Market Characteristics**

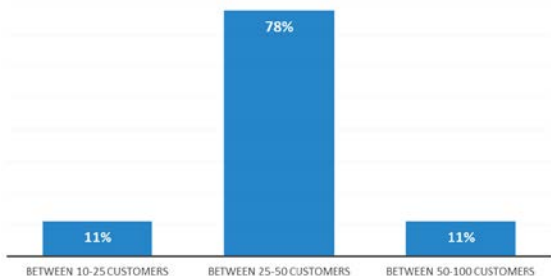
- Kataryeba is the main market of Rwamwanja settlement. Since the introduction of cash a lot of new traders and businesses have come up. Also small shops have come up within small centers in the settlement i.e. St. Michael, Mahane, Mahenga, Nkoma, Mukatafari, Kyebucumbe and Omukasisa. Bisozi is also another small trading center about 6 miles for the settlement with a weekly market every Thursday.
- Kataryeba trading center has permanent structures with currently over 200 shops dealing in general merchandise and food commodities. Half of the business are new with relatively bigger stocks compared to the time cash transfers were introduced. The center has over 50 wholesalers and big trucks now deliver goods from Mubende, Fort Portal, Ibanda, Mityana and Mbarara direct to traders in the settlement. Kataryeba also has a weekly market that operates on Tuesday.
- Bisozi trading center has about 20 shops that operate on a daily basis. The market day operates every Tuesday and over 100 traders come to the market.
- The small shops at St. Michael, Mahane, Mahenga, Nkoma, Mukatafari, Kyebucumbe and Omukasisa are operated by refugees. They purchase their good from Kataryeba market.
- 11% of the businesses visited had started less than a year, 56% in operation for 1-3 years and 33% in existence for over 5 years.

### **Commodity flow**

- Main food commodities available on the market include: Maize grain and flour, Beans, Sorghum, Millet, Rice, wheat, Cabbage, onions, Tomatoes, Vegetable oil, Meat, drinks, Sweet potatoes, Irish potatoes, cassava and Bananas. On market days goats and chicken are sold.
- During the assessment, a number of stores were seen with stocked maize flour and beans.
- Different types of non-food items were sold across the settlement which include cosmetics, shoes, clothes and household domestic utensils.
- Traders dealing in maize grain on average had 800Kg in stock. The main sources were farmers from within the settlements (refugees) and farmers from outside the settlement (nationals).
- All shops visited had maize flour and on average 200Kg in stock. The main source was traders from outside the settlement (89%) and milling within the trading centers around the settlement (11%).
- 67% of the traders visited had beans and the main sources were farmers both nationals and refugees. On average each trader had 250Kg of beans in stock.
- All shops visited had salt and vegetable oil and the main source was traders from outside the settlement.
- Only 11% of the traders interviewed had millet flour and the main source was wholesale traders from within the settlement.
- 33% of the traders interviewed in Rwamwanja settlement said that goods are delivered by trucks to the settlement while 44% said that they travel 1km to purchase their stocks.



	 <table border="1"> <thead> <tr> <th>Distance</th> <th>Percentage</th> </tr> </thead> <tbody> <tr> <td>They are delivered by collectors/providers (0 km)</td> <td>33%</td> </tr> <tr> <td>Less than 1 km</td> <td>44%</td> </tr> <tr> <td>Between 1-5 km</td> <td>11%</td> </tr> <tr> <td>More than 30km</td> <td>11%</td> </tr> </tbody> </table>	Distance	Percentage	They are delivered by collectors/providers (0 km)	33%	Less than 1 km	44%	Between 1-5 km	11%	More than 30km	11%
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<b>Market Conduct</b>											
<b>Market Regulations and Policies</b> <ul style="list-style-type: none"> <li>No restrictions for traders to operate in the market.</li> <li>Traders register with the chairman of the traders and pay registration fee of UGX 10,000.</li> </ul>	<b>Credit availability and access</b> <ul style="list-style-type: none"> <li>All traders interviewed admitted that they offer credit to some known and trusted customers.</li> <li>67% of the visited traders offer a payback period up to 2 weeks while only 33% can extend the payback period to one month.</li> <li>Some traders access loans through SACCOs, Centenary bank and Stanbic bank.</li> </ul>										
<b>Perceived Impact of Food Assistance on Markets</b> <ul style="list-style-type: none"> <li>The introduction of cash transfers has boosted customers in the market, new businesses have come up and volumes increased. Verbatim from an elder (Ruhweza Paul Akiiki 'Mayor') from Bisozi trading center said</li> </ul> <p><i>"Previously we were not benefiting from refugees. But these ones receiving cash are helpful. Congolese have accumulated wealth. I don't think refugee will go back to their home countries. Now all food stuffs have market".</i></p>											
<b>Market Prices and Purchasing Power</b>											
<b>Transaction Costs</b> <ul style="list-style-type: none"> <li>Major transaction costs are: rent, licenses, taxes and transport incurred by traders in the market.</li> <li>License ranges between UGX 15,000 – 80,000.</li> <li>Also some mentioned loading and off-loading costs.</li> </ul>	<b>Changes in volumes of sales</b> <ul style="list-style-type: none"> <li>➤ Since the introduction of cash, businesses have grown fast, sales of all goods have gone up due to increased demand. Sales more than doubled for some traders and this has attracted more businesses in the area.</li> </ul> <b>Prices Prospects</b> <ul style="list-style-type: none"> <li>Maize price was already low and expected to continue reducing up to February due to the ongoing harvest. Prices will increase starting March to June 2018.</li> <li>Beans prices were low in December and will begin to increase from January up to April 2018.</li> </ul>										

	<ul style="list-style-type: none"> <li>Majority of the interviewed traders expected prices to remain the same or a slight increase due to harvest season.</li> </ul>								
<b>Market Response capacity</b>									
<p><b>Capacity to supply food timely</b></p> <ul style="list-style-type: none"> <li>Majority (78%) of the traders interviewed can serve a maximum of 50 customers a week, 11% 25 customers and 11% 100 customers. Therefore, Kataryeba trading center alone with about 200 shops can serve roughly 12,750 people a week.</li> </ul>  <table border="1"> <thead> <tr> <th>Customer Range</th> <th>Percentage of Traders</th> </tr> </thead> <tbody> <tr> <td>BETWEEN 10-25 CUSTOMERS</td> <td>11%</td> </tr> <tr> <td>BETWEEN 25-50 CUSTOMERS</td> <td>78%</td> </tr> <tr> <td>BETWEEN 50-100 CUSTOMERS</td> <td>11%</td> </tr> </tbody> </table> <ul style="list-style-type: none"> <li>The weekly markets on Tuesday (Kataryeba) and Thursday (Bisozi) are able to supplement the daily market in shops across the settlement in case of shortage.</li> <li>56% of the traders reported having storage facilities with 500 -1,000kg capacity while 44% had stores that can accommodate less than 500Kg.</li> <li>78% of the traders indicated that they have capacity to increase supply within two weeks in case demand doubled while the 22% are able to respond after 1 month.</li> </ul>	Customer Range	Percentage of Traders	BETWEEN 10-25 CUSTOMERS	11%	BETWEEN 25-50 CUSTOMERS	78%	BETWEEN 50-100 CUSTOMERS	11%	<p><b>Major constraints</b></p> <ul style="list-style-type: none"> <li>There is high competition resulting into small profit margins from selling the commodities. Some traders would rather sell at the exact price they purchased a commodity than let a customer go elsewhere.</li> <li>Increase in traders and population has resulted into lack of space for rent hence high rent fees.</li> </ul> <p><b>Safety and Security</b></p> <ul style="list-style-type: none"> <li>Traders didn't report any serious safety and security issues other than petty theft.</li> </ul>
Customer Range	Percentage of Traders								
BETWEEN 10-25 CUSTOMERS	11%								
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## Kyaka II Settlement

### Key Highlights

1. Bukere is the main market for Kyaka II settlement and the introduction of cash has seen business grow around the trading center. Market has about 200 stalls that are used by traders and vendors in the market, with about 70 shops at the trading center. The settlement operates weekly markets every Wednesday and Saturday that supplement supplies of the daily shops.
  2. The market provides variety of food commodities especially during the market days which include cereals (maize grain and flour); tubers (Irish potatoes, cassava, and sweet potatoes); leafy vegetables ('sukumawiki', and 'boo'); tomatoes, onions, green and red pepper; cassava flour; pulses( beans); and fish.
  3. No specific regulations prohibiting people from operating in the market, new traders must abide by the already set laws, and these laws are not discriminatory.
  4. 88% of the traders indicated that they have capacity to increase supply within one -two weeks although limited capital was highlighted as a major constraint by some of the traders.
  5. Traders don't access loans from financial institutions, as majority are refugees who don't have collaterals necessary to acquire loans. Traders have saving associations that are not formally registered.
  6. Poor harvest season was also highlighted among the challenges and this will affect supplies from local production.
- Important to note is that cash transfers have stimulated market development in Kyaka II settlement although there is room for improvement. **Majority of the traders are refugees with limited capital. Therefore, there is need to mobilize more traders to take up this opportunity in Kyaka II settlement and also linking up small traders to micro-finance institutions.**
  - The poor harvest mentioned by traders will limit supplies in the settlement and this is likely to cause price increases. There is need to constantly monitor market prices to ensure that cash transfer beneficiaries are able to find food on the market and buy the right quantities from the cash transfer value received.

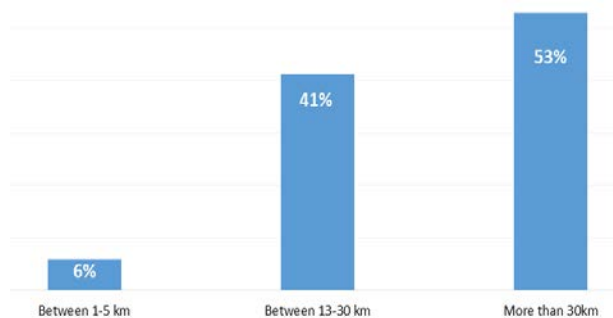
### Detailed Market Analysis (Kyaka II)

Market Structure	
<b>Market Characteristics</b> <ul style="list-style-type: none"> <li>Bukere Trading Center is the biggest and mainly accessed market by refugees across all zones in the settlement. There is a weekly market about 150 meters from the trading center that operates on Wednesday and Saturday. Also shops at the T/C are open every day.</li> <li>➤ Structures at the weekly market are makeshifts, made of wood/poles and tarpaulins. Two permanent structures (Stalls) were constructed</li> </ul>	<b>Commodity flow</b> <ul style="list-style-type: none"> <li>Number of traders: maize grain (About 20-30 traders) and beans (about 30-40 traders), mainly in March and April when the demand is high and traders are many. At the time of the assessment, the traders were few due to low demand;</li> <li>6 stores (Maize grain and Beans) at the trading center, manned by big traders. These traders purchase produce from local farmers, and later sell during times of scarcity;</li> </ul>

by government. However, permanent structures (Shops) are at the T/C;

- The market is managed by government; government takes lead in the collection of market dues and other related taxes, and issuing of trading license;
- Market has about 200 stalls, that are used by traders and vendors in the market, with about 70 shops at the trading center;
- Market is so busy, with about 1,000-1,500 participants (traders and buyers) transacting during market days, traders make more sales during these days. Majority of the traders (about 70%) are refugees;
- Market serves or supplies other smaller markets within the settlement such as Mukondo, Byabakora and Sweswe.
- All businesses visited in Kyaka II had been established more than a year ago.

- About 6 wholesalers at the trading center, and deal in several commodities such as; maize flour, Rice, Beans, Vegetable oil, Sugar, Salt and beverages;
- Commodities: Tubers (Irish potatoes, Cassava, and Sweet potatoes); leafy vegetables ('sukumawiki', and 'boo'); tomatoes, onions, green and Red pepper; flour (maize and cassava); pulses; Fish and NFIs are the main commodities purchased by refugees, "Refugees like fish, and since they are the majority, the demand for fish is high. For instance, we can have about 4 trucks of fish finished in one market day;
- Big number of buyers in the market are refugees, "these people don't have land to produce food for home consumption, so, markets are their main source for year in-year out;
- Few traders were selling maize grain and on average had 50Kg in stock. The main sources were farmers from within and outside the settlement.
- 53% of the shops visited had maize flour and on average 400Kg in stock. The main source was traders from outside the settlement.
- 29% of the traders visited had beans and the main sources were farmers both nationals and refugees. On average each trader had 1150Kg of beans in stock.
- Only 47% and 41% shops visited had salt and vegetable oil respectively and the main source was traders from outside the settlement.
- 41% of the traders interviewed had millet flour and the main source was milling from within the settlement and traders from outside the settlement.
- Majority (53%) of the traders interviewed travel more than 30Km to purchase their stocks.



## Market Conduct

### Market Regulations and Policies

- No specific regulations prohibiting people from operating in the market, new traders must abide by the already set laws, and these laws are not discriminatory.
- New traders must notify market chairpersons on the kind of business they are dealing in;
- No entry to the market without a receipt for market dues, this is issued at the gate.
- Traders not allowed to operate in a stall not assigned to them, they are advised to use stalls that they have paid for.
- Market is demarcated, each commodity sold in a specific area in the market.
- No motor cycles allowed inside the market premises.
- Timely payment of the market dues.
- Note: these laws and regulations are set by market leaders.

### Credit availability and access

- **Traders to customers:** Yes, customers pay after 1-2 weeks, others pay half and bring the balance in the next market day. Credits to customers depends on the relationships;
- **Financial institutions to traders:** traders have saving associations, not formal. Traders for instance form a group, and agree to save every market day, and it is from these savings that they loan out. Traders don't access loans from financial institutions, as majority are refugees who don't have collaterals necessary to acquire loans;
- Wholesalers are supplied commodities and other produce on credit by companies (BIDCO and Mukwano), who collect their cash during the next deliveries. Refugee traders are never trusted by companies, due to their mobility;

### Perceived Impact of Food Assistance on Markets

- Increased supplies and sales during and after distributions, many customers and traders in the market. "Since majority of the traders are refugees, we know distribution dates, so, we re-stock towards distributions."

## Market Prices and Purchasing Power

### Transaction Costs

- Taxes (40,000-50,000 for 6 months);
- Market dues (UGX 1,000), only paid by vendors and at the market
- Rent
- Transport, lorries and drivers
- Offloading, mainly for wholesalers and big retailers;
- Electricity, "we spend about 1 unit per day, we feel it is expensive."
- UGX 1,000 per trader, paid at the gate and doesn't limit the quantities;
- UGX 50,000 as rent for every 6 months per stall;
- Government through the sub-county offices collects these markets dues, since the market is erected on government land;

### Changes in volumes of sales

- During and after distributions, traders increase supplies on the market as refugees come to buy in bulk.

### Prices Prospects

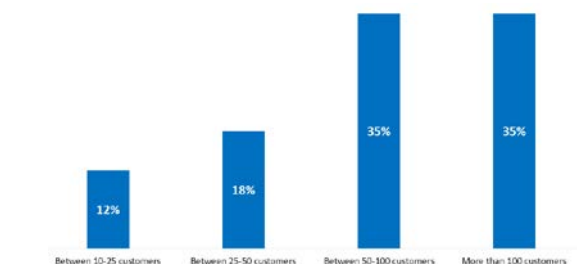
- November-January, supplies on the market are high, traders are many, including farmers, "Around this period, people don't trader (sell) due to high demand, but they sell because they want money for the festive season and school fees. So, big traders come to buy from farmers, bulk and later sell when there is scarcity." "Currently, we are expecting a new harvest in about a month from now, customers for food items are likely to reduce."
- February-May, food is scarce, many are hungry as food stocks deplete, no cash as farmers would have sold all their harvest and spent their earnings on school fees and merry making during the festive season. "This period is associated with high demand, with food scarcity and low

<ul style="list-style-type: none"> <li>➤ Charges are fixed, standardized and don't change.</li> </ul>	<p>purchasing power." Again, the number of traders reduce, we can have about 150-200 selling both food items and NFIs, and the market is only open for 2-3 hours;</p> <ul style="list-style-type: none"> <li>• However, 77% of the interviewed traders expect prices to increase greatly in the next 3-6 months because of the poor harvest.</li> </ul>
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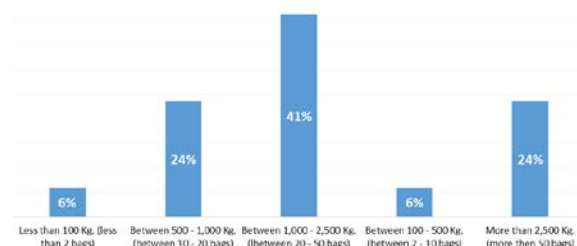
## Market Response capacity

### Capacity to supply food timely

- Majority (70%) of the traders interviewed can serve a maximum or more than 100 customers a week, 18%, 50 customers and 12%, 25 customers. Therefore, Bukere trading center has about 70 shops and these can serve roughly 5,750 people a week.



- The weekly markets on Wednesday and Saturday also supplement the daily shops across the settlement.
- All traders reported having storage facilities and (41%) reported having stores that can handle between 1 - 2.5MT.



- 88% of the traders indicated that they have capacity to increase supply within one -two weeks in case demand doubled while the 12% are able to respond after 1 month.
- However, 59% of the traders interviewed highlighted limited capital as a constraint to their capacity to respond effectively to increased demand.
- 4 milling machines around the settlement and charge UGX 100-150 a Kg of grain.

### Major constraints

- Impassable roads, especially during the rainy season, making transportation costs high. Companies such as BIDCO and Mukwano reduce their supplies during the rainy season;
- High taxes, market dues are high, for instance UGX 50,000 every six month is much for a vendor who just trades when s/he wants to earn quick money;
- Transportation costs are high, especially movements within the settlement, "if you don't have a truck, or a motor-cycle, you spend a lot on hire. Traders here either deliver their commodities to small traders in different zones or they travel to purchase produce, all this comes with a cost."
- No capital to expand-no financial institutions-no loans. Banks in Kyenjojo and Mubende, but only nationals can access loans

### Safety and Security

- Majority (88%) of the interviewed traders did not mention any safety or security problem. The few incidences report were robbery without violence especially night break-ins.
- Possible remedies suggested by traders include beefing up security (police patrols) at night.

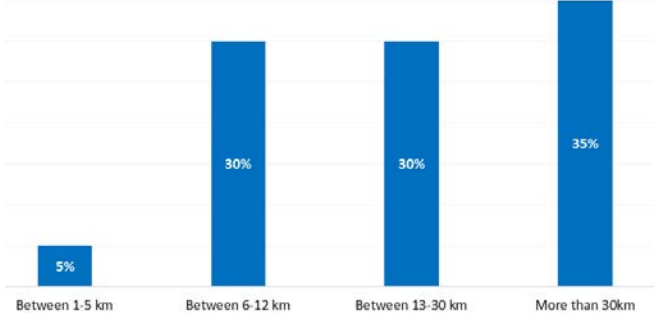
## Kyangwali Settlement

### Key Highlights

1. Since the introduction of cash transfer in Kyangwali, traders have noted big changes in their businesses in terms of increased sales and earnings. Kasonga and Kagoma trading centers have expanded as a result of new traders that have come to bridge the gap of increased demand. Other markets are developing around Kyangwali settlement e.g. Kirokole and Nyamiganda.
  2. Major commodities sold in the markets include Irish and sweet potatoes, cassava, maize flour, maize grain, cassava flour, wheat flour, beans, rice, fish, meat, onions, tomatoes, greens and NFIs. Most of the staples (maize and beans) are produced locally.
  3. Markets are open to all traders although new entrants have to subscribe to the traders' association at a fee of UGX 20,000.
  4. 55% of the traders indicated that they have capacity to increase supply within one -two weeks in case demand doubled while the 45% are able to respond after 1 month. 70% of the interviewed traders have the capacity to serve 100 customers and more weekly.
  5. SACCOs are the main sources of credit, these are traders' associations. No access to loans from banks, since many the traders are refugees. SACCOs do offer cash round and this has been helpful in boosting small scale trader's working capital.
  6. The key challenges highlighted include, high transport costs, poor infrastructure, untrusted middlemen and low demand as time goes by after distribution.
- Cash transfers created more demand resulting into more traders coming into business and new markets developing. Currently, the traders are making little profit as competition is high. Forces of demand and supply will continue setting levels of equilibrium and some traders who won't break even will be forced out of business.
  - Important to not is that infrastructure is not good especially roads. **The advantage is that most of the staple food is produced locally but in case of a poor harvest, then prices are likely to spike and beneficiaries will suffer. Therefore there is need for continues monitoring of the production season, market supplies and prices.**

### Detailed Market Analysis (Kyangwali)

Market Structure	
<b>Market Characteristics</b> <ul style="list-style-type: none"> <li>Kagoma is the main and biggest market in the settlement, and operates weekly (Tuesdays). Kasonga market is within a trading center (Operates daily). Other markets in the settlement are Kirokole and Nyamiganda Markets;</li> <li>Structures (shops) are mainly semi-permanent (wood and mud), stalls in the market are makeshifts (wood and Tarpaulins); Shops are</li> </ul>	<b>Commodity flow</b> <ul style="list-style-type: none"> <li>Commodities: Irish and sweet potatoes, cassava, maize flour, maize grain, cassava flour, wheat flour, beans, rice; fish and meat. Vegetables sold include onions, tomatoes, and greens. NFIs are also sold in the market.</li> <li>Demand for cassava flour is usually high and majority of the buyers in the market are refugees. "These people don't have land to produce food for home consumption, so, markets are their main source for year in-year out".</li> <li>40% of the traders interviewed were selling maize and 65% beans, mainly procured locally from farmers around</li> </ul>

<p>about 40 and roughly 120 stalls and many operate in the open.</p> <ul style="list-style-type: none"> <li>• Market (Kagoma) is too busy during market days, with more than 10,000 participants, “the market is big and too busy, compared to other markets in Hoima and Kagadi, and actually traders can’t afford to miss market days.”</li> <li>• Kasonga market is also busy, with about 200-500 participants transacting daily. Kasonga has about 50 shops and 100 stalls.</li> <li>• About 4 wholesalers, deal in maize grain and beans. They buy from local farmers, bulk and sell to external traders, also to local traders and consumers during times of scarcity. “Refugees mostly buy between March-June, when food stocks are very low.”</li> <li>• Traders are organized into groups, depending on the commodities they sell, and market is demarcated in that each commodity is traded at a specific point.</li> <li>• It is estimated that about 80% of the traders are refugees, and women mainly vend food items and other vegetables. Men trade in NFIs, possibly due to access to capital compared to women.</li> <li>• About 50 traders sell maize grain and beans. On market days, it is hard to estimate because every trader including farmers trade to earn incomes so that they can buy other household necessities.</li> <li>• All business visited during the market assessment had been in existence for more than a year. Therefore, the owners now have a better understanding of the market and how to cope when business is uncertain.</li> <li>•</li> </ul>	<p>the settlement (both refugees and nationals). On average traders had 300Kg of maize grain and 450Kg of beans in stock.</p> <ul style="list-style-type: none"> <li>• 40% of the shops visited had maize flour and on average 160Kg in stock. The main source was local milling and traders from outside the settlement.</li> <li>• 45% shops visited had salt and vegetable oil respectively and the main source was traders from outside the settlement.</li> <li>• Only 15% of the traders interviewed had millet flour and the main source was milling from within the settlement and traders from outside the settlement.</li> <li>• 65% of the traders interviewed travel more than 12Km to purchase their stocks.</li> </ul>  <table border="1"> <thead> <tr> <th>Travel Distance</th> <th>Percentage</th> </tr> </thead> <tbody> <tr> <td>Between 1-5 km</td> <td>5%</td> </tr> <tr> <td>Between 6-12 km</td> <td>30%</td> </tr> <tr> <td>Between 13-30 km</td> <td>30%</td> </tr> <tr> <td>More than 30km</td> <td>35%</td> </tr> </tbody> </table> <ul style="list-style-type: none"> <li>• No supplies from out, “the land is fertile, and everyone is farming, we don’t lack food. Our main customers are traders from other districts, new arrivals (refugees), and some nationals.</li> <li>• During scarcity (March-June), much food (grains) comes from out (Kibale); cabbage, matooke, and Irish potatoes are from Mbarara. Other periods of the year, local farmers supply neighboring towns. Too much food is exported, compared to what comes in;</li> <li>• BIDCO and Mukwano supply industrial/processed products two times a week.</li> </ul>	Travel Distance	Percentage	Between 1-5 km	5%	Between 6-12 km	30%	Between 13-30 km	30%	More than 30km	35%
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## Market Conduct

### Market Regulations and Policies

- Markets are open to all traders. New traders are required to: introduce themselves to the LCI, mayor, and LCII where they are expected to explain what they intend to trade in, after, they are assigned a stall. This is only on market days, other days, it is open.

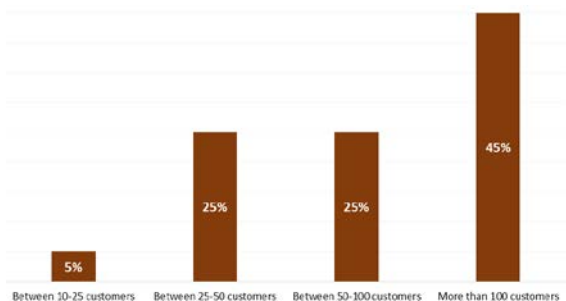
### Credit availability and access

- **Traders to customers:** offer commodities on credit, payment terms depend on how the two have agreed, and it is mostly after receipt of cash (monthly), others weekly.
- **Financial institutions to traders:** SACCOs are the main sources of credit, these are traders’ associations. No access to loans from banks, since many the traders are refugees. “Trader associations are good; we get quick loans and the payment is timely. Members of these

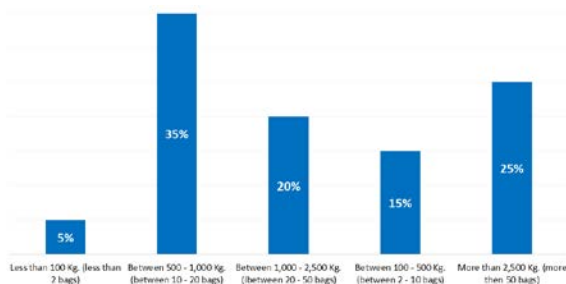


<ul style="list-style-type: none"> <li>• New traders must join traders' association for orientation and guidance. Subscription to each association is at UGX 20,000.</li> <li>• All traders must pay market dues, it is mandatory, "some traders who fail to pay and are not compliant are summoned by the leadership of the market.</li> <li>• Each commodity must be traded in a gazetted area in the market.</li> <li>• Hygiene is everyone's responsibility.</li> <li>• Fighting and quarrelling is prohibited in the market.</li> <li>•</li> </ul>	<p>groups have mutual understanding of each other, since they trade in similar items." SACCOs do 'cash rounds', for instance a group of traders give a specified amount of cash to a group member this week, and next week, another receives, and the cycle continues;</p> <ul style="list-style-type: none"> <li>• <b>Money lenders</b> deal with well-established traders, there are some refugees who lend money to people and expect interest, and repayment period depends on the agreement between the two parties.</li> <li>• Some traders who have accounts with banks and have consistently been saving usually get loans, unfortunately, majority of the traders are small scale.</li> </ul>
<p><b>Perceived Impact of Food Assistance on Markets</b></p> <ul style="list-style-type: none"> <li>• Since the introduction of cash transfer, the markets around the settlement have grown. Trader sales and earnings have increased and the supplies on market due to the increase in demand. Prices haven't increased significantly because of local production and increased supplies as many traders come in to trade.</li> </ul>	
<p><b>Market Prices and Purchasing Power</b></p>	
<p><b>Transaction Costs</b></p> <ul style="list-style-type: none"> <li>• Daily market dues</li> <li>• Rent</li> <li>• Transportation, movement within the settlement, and cost depends on the distance.</li> <li>• Subscription to trader associations (UGX 20,000)</li> </ul> <p>➤ In Kasonga, UGX 500 is collected by Government as market dues, when the stock is worth UGX 10,000.</p> <p>➤ In Kagoma, UGX 2,000-3,000 is charged as market dues, and depends on the quantity of your stock.</p>	<p><b>Changes in volumes of sales</b></p> <p>➤ January-February, sales are low due to the harvest; June-July, sales go up, due to scarcity (demand);</p> <p>➤ "In 2016, the harvest was generally poor following a prolonged dry spell, food was scarce on the markets, and prices went up. As of now, the situation is better, good and improved yields."</p> <p><b>Prices Prospects</b></p> <ul style="list-style-type: none"> <li>• Maize prices, higher in from March-June and lower between August-September and December-January;</li> <li>• Beans prices, higher in November-January, then April-June, and lower from July-September;</li> <li>• Generally, prices are higher between March-May and August-September, prices are higher since these are planting seasons;</li> </ul>
<p><b>Market Response capacity</b></p>	
<p><b>Capacity to supply food timely</b></p> <ul style="list-style-type: none"> <li>• 70% of the interviewed traders have the capacity to serve 100 customers and more weekly. Therefore, the 90 shops in Kasonga and Kagoma</li> </ul>	<p><b>Major constraints</b></p> <ul style="list-style-type: none"> <li>• Transportation costs are high, no vehicles operating within the settlements.</li> </ul>

trading centers (excluding weekly markets) can serve roughly 7600 customers weekly.



- All traders reported having storage facilities and (45%) reported having stores that can handle more than 1MT.



- 55% of the traders indicated that they have capacity to increase supply within one -two weeks in case demand doubled while the 45% are able to respond after 1 month.
- Most of the staples (maize and beans) are produced locally.
- However, 70% of the traders interviewed highlighted limited capital as a constraint to their capacity to respond effectively to increased demand.
- There are 5 milling machines around the settlement and they charge UGX 300-400 for a Kg of maize flour (1<sup>st</sup> class) and UGX 100-200 per Kg (2<sup>nd</sup> class).

- Traders pay farmers in installments, affecting relationships and supplies on the market. Farmers are main suppliers on the market.
- Middlemen, not trusted. Buy produce cheaply, but charge highly in the markets;
- Poor infrastructures, makeshifts in the markets, traders (vendor mostly) sell in the open. "Our market as you see is not well-built, the fish is affected by dust, and the hygiene in the market is generally poor."
- Break-ins high during the festive season, traders loose cash and other items;
- Lack of customers, no demand for food due to low purchasing power. "Most traders make more sales after distributions, around this time, people have money and they flock to the market."

### Safety and Security

- No serious safety or security incidences were reported by traders that are affecting their businesses.

## Price data (December 2017)

S/N	Commodity	Local unit of measure	Nakivale	Oruchinga	Rwamwanja	Kyaka II	Kyangwali
1	Maize grain	Kg	800	1,040	500	1,000	700
2	sorghum	kg	-	-	-	833	467
3	Maize flour	Kg	1,850	1,620	2,000	2,500	1,500
4	Rice (Super)	Kg	2,850	3,400	3,660	3,500	4,000
5	Rice (Pakistan)	Kg	3,775	3,820	3,720	3,833	3,250
6	Rice (Kaiso)	Kg	3,150	3,260	2,420	3,000	1,767
7	Wheat flour	kg	3,175	3,000	3,150	3,083	3,500
8	Cassava flour	Kg	1,875	1,540	1,580	2,700	-
9	Cassava-fresh	Basin/heap	18,250	14,600	21,000	1,000	1,000
10	Bananas	Bunch	9,750	12,600	11,600	-	15,000
11	Sweet potatoes	Basin/heap	15,500	16,000	17,600	1,000	-
12	Beans (Nambale – red with spots)	Kg	1,725	1,540	1,600	1,867	2,000
13	Beans (Agwede)	Kg	2,150	1,660	1,540	-	-
14	Beans (Yellow)	Kg	3,250	2,180	3,500	2,333	-
15	Peas	Kg	3,775	3,940	3,640	2,000	2,000
16	Vegetables	Kg	-	-	-	1,000	1,000
17	Irish Potatoes	Kg	1,550	1,760	1,000	2,000	1,875
18	Beef - Cow	Kg	10,000	10,000	10,000	10,000	10,000
19	Beef - Goats	Kg	12,000	12,000	12,000	-	-
20	Fish	Kg	-	-	-	10,667	-
21	Chicken (Cock)	Kg	-	-	-	35,000	35,000
22	Cooking Oil	Litre	6,750	6,000	5,600	5,000	6,000
23	Sugar	Kg	4,375	4,700	5,000	5,000	4,800
24	Millet Flour	Kg	3,225	4,300	3,000	4,000	4,000
25	salt	Kg	1,200	1,200	1,200	1,200	1,200