Rapid Assessment for Markets: Bidibidi Refugee Settlement
Yumbe, Uganda, November 7-9, 2016

An interagency initiative undertaken by DCA, Mercy Corps, World Vision, ACF, Oxfam, Save The Children, NRC, URDMC, Samaritans Purse

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Contents

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Acronyms

RAM – Rapid assessment of Markets
OPM – Office of the Prime Minister
ACF – Action Against Hunger
NRC – Norwegian Refugee Council
DCA – Danish Church Aid
URDMC – Ugandan Refugee and Disaster Management Council
WFP – World Food Program
HEA – Household Economy Analysis

Executive Summary

The Rapid Assessment of Markets (RAM) conducted within the Bidibidi Refugee Settlement and in the surrounding Ugandan towns and trading centres sheds some light upon the rapidly developing network of marketplaces within one of the world's fastest growing refugee settlements.

Variations in the size and diversity of marketplaces across the five zones of Bidibidi demonstrates how quickly markets can respond to increasing and shifting demand. Zone 1 opened on August 3rd, 2016 in response to the influx of refugees from South Sudan. In the beginning, marketplaces were slower to open up in zone 1, but have gradually grown into the largest and most developed of the settlement offering a range of products and services. Zone 1 marketplaces now include a range of shops and services. The shops are selling a mix of items ranging from foodstuffs, fruit and vegetable sellers, beauty and cosmetic supplies, clothing, shoes and hardware. Services available include phone shops and charging centres, make shift warehouse structures, tailors, grinding mills, barbershops, restaurants, and forex exchange centres.

Subsequent zones in the settlement opened on a rolling basis from August to November 2016, with each new area opening as the previous ones reached capacity. As each newly opened zone was settled, Ugandan retailers opened businesses to provide goods and some limited services to the new arrivals.

A number of South Sudanese entrepreneurs also invested and opened up shops, along with petty retailers selling cooked foods and vegetables. Over time, greater numbers of marketplace stalls have been constructed, with new ones appearing on an almost daily basic across the entire settlement. Refugee settlement in Zone 5 began only 2 days before data collection for this assessment was conducted, and new retailers were setting up businesses , even as the first refugees arrived at the reception centre.

Key findings from the assessment

- Marketplaces are growing to meet demand – the speed and capacity of the expansion should continue to be carefully monitored.
- Continued support to the refugee population through cash based responses could provide a valuable stimulation to local demand and support localized trade.
- Coordination of cash based responses is critical to ensure that the marketplaces of Bidibidi are not placed under the duress of excess cash coming in. Although traders and markets appear to be well integrated, expanding rapidly, and responsive to increased demand, they are still quite small. While stimulating demand could support their expansion, too rapid an influx of cash could still overwhelm local supply.
- Supporting the supply of goods to the area (transport, linking market actors to other traders, support for retailer expansion etc.), could help increase the diversity and quantity of accessible goods and services.
- There are Ugandan settlements and Trading Centres within the boundaries of the Bidibidi settlement that moving forward will be economically closely linked to the refugee population and market centres, through livelihoods, trade, and income generating activities. The host community in these areas should be a part of the solution for the refugees they now host
- Youth are looking for opportunities to supplement income and help support their families; many are looking for ways and opportunities to restart the small businesses and income generating activities they engaged in prior to leaving South Sudan. There was a clear opportunity to support them to respond to demand within the local marketplaces through establishing small business enterprises.
- Experiences and learning from the growth of Adjumani settlement need to be considered and brought to Bidibidi.
- Price and availability monitoring of key food and non-food items should be conducted at minimum on a monthly basis.

- Access to credit and financials services was a clear concern for many market actors and a significant barrier to both starting and expanding micro-enterprises in the settlement markets. Improving access and connections to financial services is important for the continued growth of these marketplaces.
- Seasonal highs and lows of commodities were discussed but the answers from the host of different traders varied too greatly to be certain – it should be noted that seasonality will play an important role in pricing of food stuffs and less so for manufactured goods or NFIs.

Intervention Recommendations

- Initiation of smaller scale cash transfers for immediate lifesaving needs – food and non-food
    - Inputs of cash such as this will contribute to enabling retailers within the settlement to grow their businesses and provide a stronger supply chain of goods for purchase while meeting the immediate and diverse needs of highly vulnerable refugees.
- Voucher or electronic voucher for immediate lifesaving needs - food and non-food
    - Significant capacity building may be required for electronic vouchers, for both the consumers and participating retailers.
- Provision of micro-business start-up transfers for youth

1. Introduction to the RAM

Methodology

This market assessment was conducted in order to better understand the evolving marketplaces brought about by the influx of South Sudanese refugees into the Bidibidi refugee settlement in Yumbe, Uganda. It provides a snapshot of market function, capacity, and diversity across the zones in early November 2016, and is a crucial first glance into how the newly developed settlements and marketplaces are evolving to meet the needs of the newly settled South Sudanese population. These marketplaces are currently providing both goods and services which refugees rely on to meet their basic needs, as well as providing trading opportunities and livelihoods to both the Ugandan host community and refugees.

The settlement was first opened the Government of Uganda on August 3rd, 2016. The population currently (as of November 26th, 2016) stands at 239,570 people (91,359 households), with an average household size of 2.6 people[1]. The affected population includes both the refugees and the surrounding host communities, as the refugee population is now 49% of the entire population of Yumbe District (n=485,582), the entire population of Yumbe District.[2]

In order to conduct this RAM assessment an emphasis was placed upon coordination with all organizations operational in Bidibidi that may consider utilizing a cash based response to provide the goods or services they are delivering to the affected refugee population. The RAM brought together a team of 9 organizations, with 8 team leaders and 60 enumerators. This large grouping conducted individual interviews, focus group discussions and observations across sixteen marketplaces.

Although based on the RAM methodology, this assessment did not include all elements of the RAM. For example market maps were not developed. Also, the assessment team wanted to generate an overall picture of the availability of basic needs items in the developing marketplaces across the settlement and so chose to look at a much broader set of goods than would be typically assessed in a RAM. This provided more of an overview of the markets, rather than a detailed picture of selected supply chains.

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[1] Reference to OPM registration data

[2] Yumbe District population as of 12/03/2015 was reported at 485, 582 – (Yumbe District Local Government Second Development Plan 2015/16 – 2019/20 (YDLGDPII)

In total 148 traders were interviewed for this assessment. 26 of which were wholesalers in the Ugandan feeder markets. As the refugee marketplaces in both zones 4 and 5 were quite small at the time of the assessment, the enumerator teams spoke to traders in some of the Ugandan Trading Centers within the boundaries of the zone. These centers serve refugees and are a supply source for the refugee traders starting up within the settlement. For the purposes of this assessment, they have been included as "settlement markets" rather than Ugandan Feeder Markets.

Market/Zone	Ugandan	South Sudanese
Zone 1	13	3
Zone 2	5	9
Zone 3	7	5
Zone 4	8	6
Zone 5	4	0
Barakala	23	0
Yumbe	27	0
Koboko	27	0
Total	**114***	**23***

*There were some blank details in the data

Limitations of the methodology

- Some of the marketplaces assessed did not operate at full capacity until later in the day beyond the hours of the team working
- A number of distributions and gatherings were taking place in various locations during the period of the assessment, resulting in lack of availability or participation of some respondents
- The number of markets assessments made it challenging to amalgamate all of the data and details
- The digital data collection format should not have included so many open ended qualitative questions – resulting in a large challenge to extract information more efficiently

Essential Notes

- Traders = either a retailer or a wholesaler
- The left axis of the graphs is representative of the % of traders (retailers) that gave that answer
- Not all traders interviewed had all commodities available or had answers, thus some information appears to be missing in the graphs and results – this does not reflect the overall understanding from what was assessed

2. Marketplace and Commodity Selection

2.1 Locality of Marketplaces

The assessment included both the marketplaces within Zones 1 to 5 of Bidibidi Refugee Settlement plus Ugandan villages and trading centres all within Yumbe District of the West Nile sub region in Uganda. (see Annex III for details)

The settlement marketplaces are the primary sources for goods and services that refugees have access to, while the Ugandan feeder markets selected were the main market hubs for West Nile and thought to be important supply sources for the settlement.

The marketplaces assessed included:

Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Ugandan Feeder
Bidibidi 2	Swinga	Yoyo 2	Lomonga*	Ariwa*	Koboko
Tranjiji	Swinga Koro	Kigo	Abirimajo*	Karunga*	Yumbe
Point 0 Market		Yoyo 4		Zone 5 market	Barakala

*Lomonga, Karunga, Ariwa and Abirimajo are all trading centres in the Ugandan community

Zone 1

- The existing market places in zone 1 have been around the longest of any within the settlement
- Contain the variety of services indicated in section 3 above
- Growth of these marketplaces may slow down however as the refugee reception centre is no longer located there and thus the added existence of new refugees on top of those who currently reside there is a factor that has changed

Zone 2

- Growth has been equally prevalent and several marketplaces exist
- New structures are being built daily within the various marketplaces

Zone 3

- There are expansive shop structures being built in one of the marketplaces
- How soon the shops fill up is hard to say

Zone 4

- Still slow in growth but new structures are up and coming
- Likely to continue to expand in the near future

Zone 5

- The least developed of the marketplaces but a lot of opportunity for growth exists now that the reception centre has been relocated here thus bringing in a ready supply of new customers
- The fastest marketplaces to emerge upon arrival of the refugees – locals taking notice of what is happening around them and adapting much faster

2.2 Commodities assessed

The assessment team decided to look at a fairly comprehensive basket of commodities within four categories: fresh foods, staple foods, non-food items, and productive assets. The specific commodities within each category were selected in consultation with the participating organizations as well as members of the refugee population. The selected commodities represent the items refugees and agencies felt were most necessary to have available and accessible to refugees.

The productive asset items were included primarily out of interest to inform programming in the coming months as refugees gain access to agriculture land and start to consider cultivation. As the markets in many of the settlement zones were nascent at the time of data collection, they had primarily food and very basic NFI goods available and so data on the productive assets was collected mostly in the Ugandan feeder markets to inform potential for future supply and availability.

Fresh Foods	Staple Foods	Non-Food Items	Productive Assets/tools
Tomato	Cassava Flour	Soap	Pangas
Onion	Maize	Jerry Cans	Hoes
Okra	Beans	Utensils	Seeds
Leafy Greens	Sorghum	Clothes	Slashers

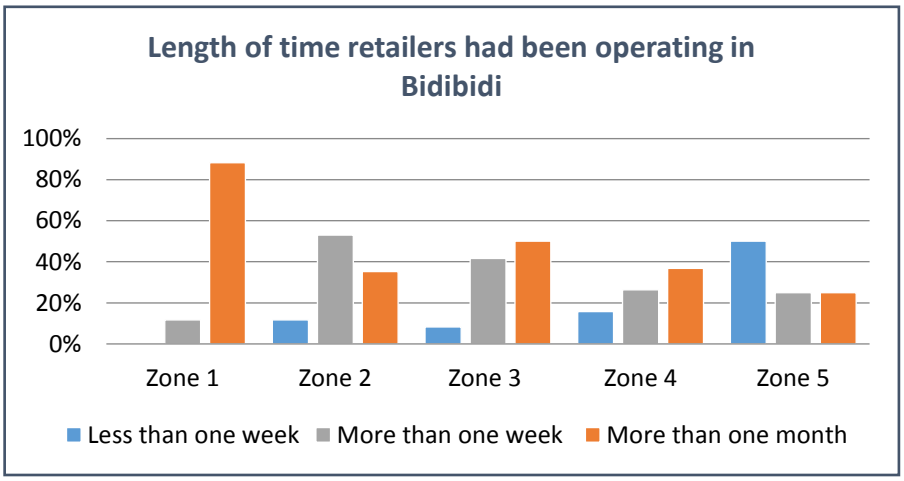
3. Trader/Marketplace Analysis

3.1 Access to the Marketplace/traders

Physical access to markets has not been affected by the refugee influx. It is actually the opposite as new marketplaces are emerge (much like they did in Adjumani) access for both the incoming refugee population as well as the local Ugandan population within Yumbe District has increased. If anything, access to markets is beginning to improve within the District.

The rapid population shift has caused a chain-reaction of marketplace growth and expansion as a whole. These changes are twofold:

- There is a rapidly growing number of retailers setting up shop within and around the Bidibidi settlement (all zones). Each of the marketplaces are at various stages of development that reflects the amount of time since the settlement zone was actually populated with refugees. It is worth noting that over time, each of these marketplaces has increased in size, both in terms of the number and diversity of retail shops.
- Most goods available are being bought within the local feeder markets in Koboko and Yumbe as well as Arua by the majority of these settlement marketplace retailers, thus generating a knock-on effect of supply in order to meet the new demand in the District set by the refugee population.



Note: In zones 3, 4 and 5 the assessment teams included some of the Ugandan trading centres that fell within the zone. This was in part because the zone marketplaces were still very small, and refugees were accessing goods in the Ugandan trading centres.

Figure 1: Operational time of retailers in Bidibidi

3.2 The impact on prices of the food and non-food commodities

Bidibidi Settlement Marketplaces

When asked how prices had shifted in their areas, traders provided a mix of responses. It is likely this reflects relatively stable prices with small shifts depending on timing in relation to other distributions; market days in nearby markets or availability of items.

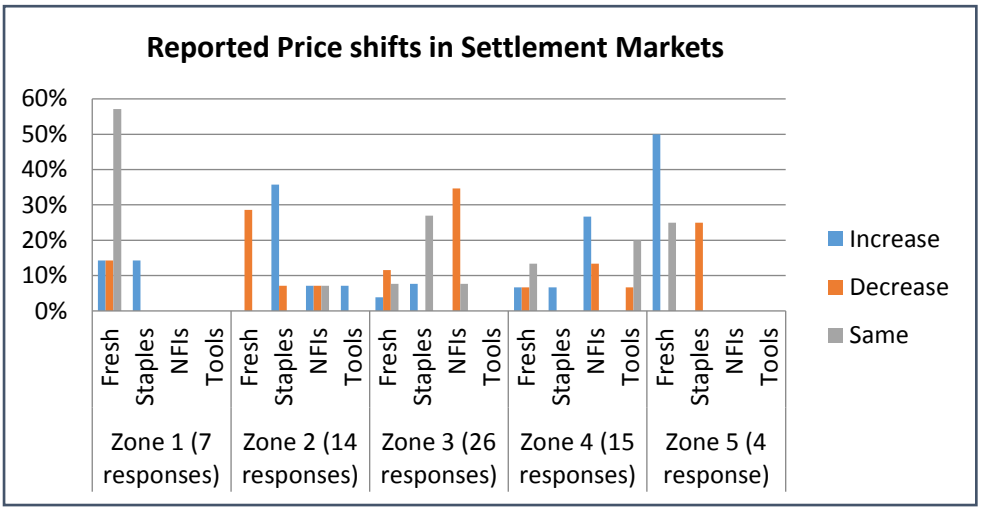


Figure 2: % of traders reporting increasing, decreasing, or stable prices by commodity types

Ugandan Feeder Marketplaces

In the Ugandan feeder marketplaces, higher percentages of traders reported generally stable or decreasing prices since the settlement opened in August for food products.

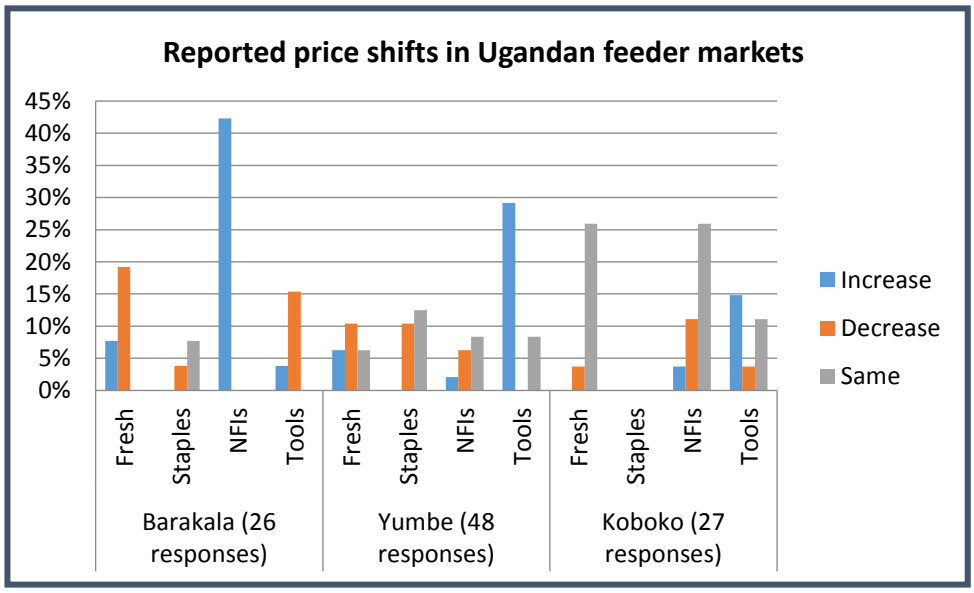


Figure 3: % of traders reporting increasing, decreasing, or stable prices by commodity types

4. Demand

4.1 Purchasing power of the affected population

The incoming refugee population have very little purchasing power. Some are arriving in the settlement with cars or motorcycles, while others are arriving with only their clothes and a few small possessions or nothing at all. The vast majority of refugees do not have the means to purchase their own food or non-food items for the moment. They tend to have no current source of income, and fewer linkages to relatives in South Sudan than those who have arrived in locations like Adjumani in years gone by. One could argue that the support network of relatives and friends who might have previously sent money are in many cases is reducing in number as broader displacement occurs.

Currently, the most likely source of income for many of the refugees will come once they are able to cultivate their designated plot of land (the agricultural plots of 50x50 that have been discussed) and sell through petty trade. In the interim, many are selling assets (either distributed or brought with them); some are using the limited savings they have to engage in petty trade, while others seek basic casual labour opportunities or are involved in cash for work.

The shifting behaviour of both the refugee population as well as the traders in the area is reflective of the sudden growth in the demand for more goods and services. Behaviour on the part of the traders – primarily retailers in this case, has also shifted, as many more are moving to open up shop in one of the various marketplaces in and around the settlement, including supplying the basic immediate need items at the reception centre where the refugee are registered.

Although purchasing power is limited, needs are significant and the incoming refugee population is slowly beginning to bring about a larger demand for goods and services within and around Bidibidi. Some of these items, such as soap, sandals and jerry cans, are now available for sale the moment that the refugees arrive while others goods are just starting to be brought into the marketplaces of Bidibidi. Fresh foods and other basic food commodities appear to be the highest in demand, as they tend to be found everywhere and available before other goods arrive – even beyond the marketplaces themselves as many individuals are selling basic foods directly from their shelter within the zones. This included individuals selling vegetables, fruit and even cooked foods.

4.2 Changes in the types (quality) and quantities of commodities demanded

Bidibidi Settlement Marketplaces

In each zone, the assessment enumerators used the zone's opening date as a reference point to ask about shifts in marketplace activity. Overall, the demand for most goods assessed across all zones of the Bidibidi settlement has increased, with the exception of tools/productive assets. As needs are quite high for nearly all refugee families, it is likely that the demand for goods (and services) will remain high for some time.

When looking at the data on shifts in demand, it is important to note that data for this assessment was collected over a few days. Therefore, responses are likely to have been influenced by the timing in relation to food distributions. In some zones, it had been a few weeks since the last distribution, while in others, distributions were happening during the assessment data collection exercise. This will likely have impacted retailers' perceived demand for various commodities, particularly food.

Fresh foods

- Retailers across all zones indicated that there was an increased demand for fresh foods
- 100% of the retailers in zone 4 indicated an increase while in zone 2 there was more diversity in response to the question, with at least a few retailers suggesting demand had actually decreased. This may be in part a response to people leaving the area and spreading out from the original reception areas.

Staple foods

- Over 80% of the retailers in all zones indicated that there was an increased demand for staple foods

NFIs

- Approximately 75% of retailers in zone 4 indicated a decrease in the demand for NFIs. There were decreases in demand across other zones as well but slightly lower. The distribution of NFIs to the refugees could play a factor in this. This parallels the number of distributed NFI items that were for sale in many of the settlement marketplaces.

Tools/productive assets

- It was only in zone 4 that any responses came in for this specifically. 60% of retailers there indicated that there was an increase in demand while another 40% suggested that the demand remained the same

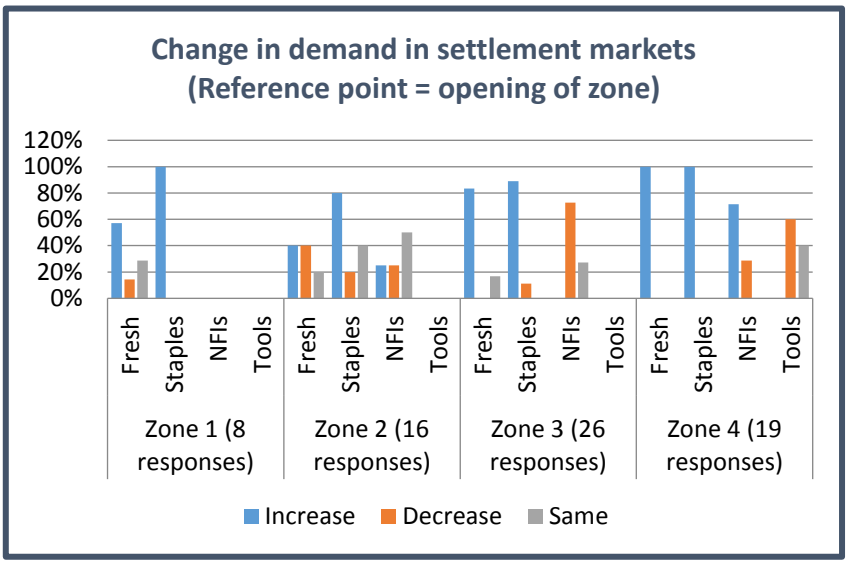


Figure 4: % of traders reporting increasing, decreasing, or same demand by commodity types *zone 5 not included here as there was not enough information to add in

Ugandan marketplaces

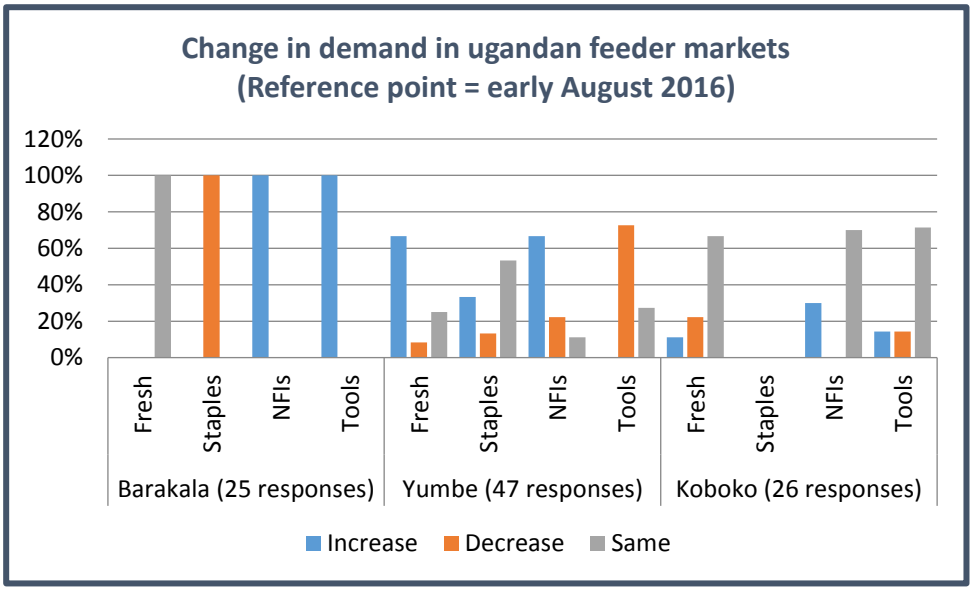


Figure 5: % of traders reporting increasing, decreasing, or same demand by commodity types

In the three Ugandan towns where the assessment took place; there were a range of responses that show that demand for many of the commodities remained the same from early August. In Barakala however there was a spike in the demand for NFI's and tools. It is not certain why this was given that the planting season has not yet come. In Barakala there were no distribution items seen but in Yumbe there were a large quantity of relief items found for sale.

Quality

No specific comments related to the quality of goods in demand were reported during the survey. It should be noted however that the demand for higher quality goods will likely come at a time when the refugee families have settled in a little bit longer. Given that the entire settlement is brand new and in zone 5 some people are still arriving, there is less of a discussion over quality versus simply getting goods. Over time, the refugees will be less inclined to accept poor quality goods – food or otherwise. As the consumers of these goods, they are in the best position to judge what the quality is. It remains to be seen if the retailers within the marketplaces begin to change up the quality or not. This is something to follow up on in the future (as noted in section 9).

4.3 Additional items in demand

Apart from the goods that are currently available, discussions with retailers across the Bidibidi settlement revealed a number of other items that customers have been requesting to be sold.

Zone #	Food items requested	Non Food items requested
1	Fruits, vegetables, coffee, rice	
2	Staples, greens, fish, g-nut, simsim	Soap, nails, cigarettes, batteries
3	Vegetables, cassava flour,	Clothing, shoes, sanitary towels, jerry cans, soap
4	Sugar, milk, eggs, rice, coffee	Alcohol, Matches, Ruled paper books, Spade, Axe, Hammer
5	Sugar, rice, maize, fruits	-

Figure 6: items requested to retailers by affected population

*worth noting is that okra is on high demand across all zones

5. Supply of Goods

5.1 Impact on supplies

The influx of a population of this size is clearly going to have an immediate impact on the supply chain of commodities within the District. The demand for basic items has increased substantially and as a result, the socio-economic impact of the presence of refugee settlements is profound.

The settlement and surrounding marketplaces are rapidly becoming a large draw for services, shops and social amenities. Refugees and host community alike access some of the marketplaces on the outskirts and within the geographic boundaries of the settlement. The size, population density, commerce opportunities, and occupational backgrounds of the settlement are establishing a semi – urban like atmosphere with market stalls, shops, make shift warehouse structures, phone shops and charging centres, grinding mills, barber shops, restaurants and forex exchange centres.

Within the settlement marketplaces there are a number of changes as well. Many refugee and Ugandan traders offer a variety of services across the settlement zones. These include selling cooked food or working in makeshift restaurants or butcheries, tailoring services, grain and maize milling, panga sharpening, video halls, carpentry, building and block making for shelters and furniture, bodaboda transport, telephone service and charging, forex exchange and clothing shops.

In some cases, both refugee and host population jointly manage the marketplace as co-chairpersons. There is a growing mix of both Ugandan and South Sudanese traders entering into business in these marketplaces.

All marketplaces within the settlement are operating daily, though business for some does not pick up until later in the day (making them tougher to assess). Access to these marketplaces is unrestricted. Most marketplaces are located within the settlements directly while others are on the perimeter of the settlement, connecting access for Ugandans in the surrounding areas as well. Some of those locations are also a part of Ugandan trading centres (Lomonga, Abirimajo, Karunga and Ariwa)

Due to increasing refugee influx, there has been a positive impact on supply chain where traders just began to meet the new market demand. The supply chain of the different goods assessed in the RAM varied. Many of the foodstuffs came either from local areas or from feeder markets in Yumbe or Koboko. Other goods came from source markets such as Arua, Soroti, and even from DR Congo. Manufactured goods such as the hoes or pangas (productive assets) are supplied from Kampala.

5.2 Capacity to increase supply

Bidibidi Settlement Marketplaces

The majority of the retailers spoken to within the marketplaces of the Bidibidi settlement indicated that as nearly all of their supplies came primarily from local suppliers (local for them referring to suppliers within the West Nile sub-region); they could potentially scale up their businesses if the demand increased quickly.

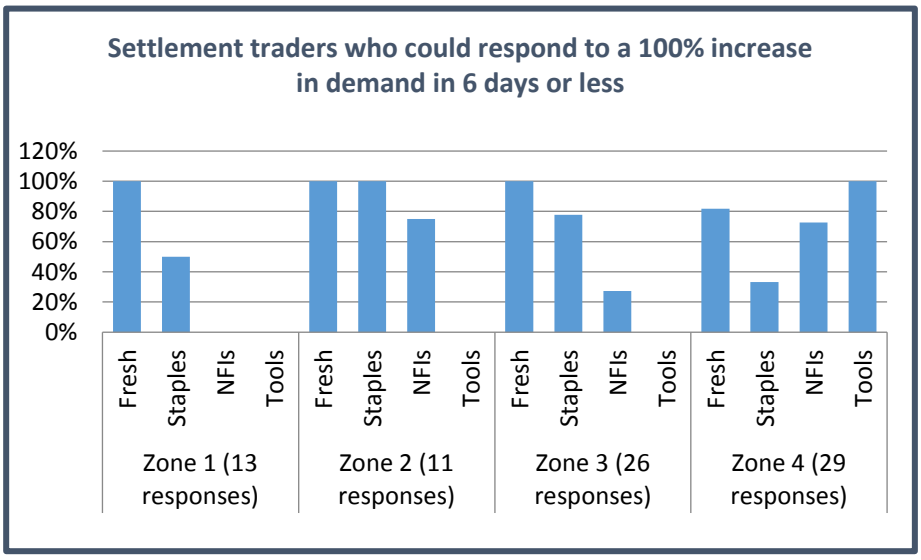


Figure 7: % of traders reporting that they can scale up their supply by 100% in 6 days or less

- 93% of retailers said they could increase fresh food stock within 6 days
- 68% of retailers said they could increase staple food stock within 6 days
- 54% of retailers said they could increase NFI stocks within 6 days
- Only retailers in zone 4 indicated that they could increase stock of productive assets/tools within 6 days (tools were not scalable in other zones)

Ugandan Feeder Marketplaces

As these marketplaces are central to the supply of goods in Bidibidi, there is little difficulty in scaling up the quantity of goods within 6 days or less.

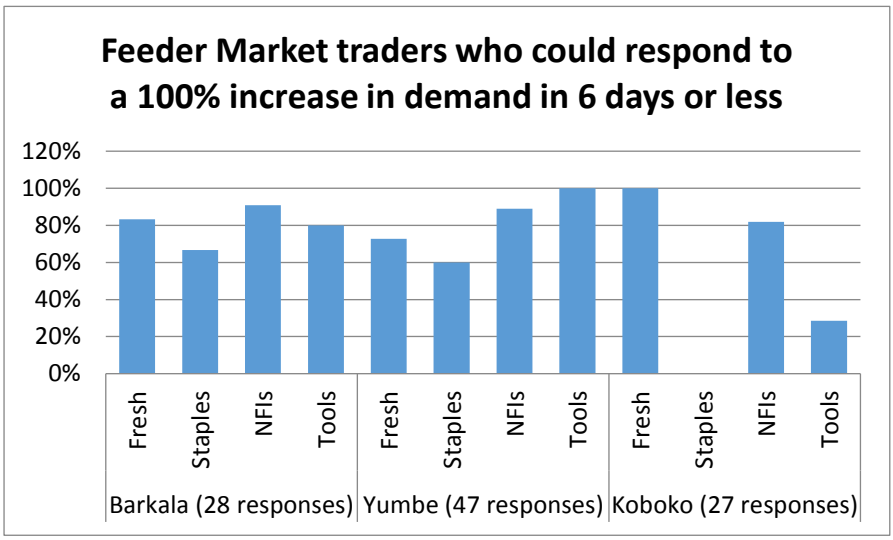


Figure 8: % of traders reporting that they can scale up their supply by 100% in 6 days or less

- 85% of traders said they could increase fresh food stock within 6 days
- 63% of traders said they could increase staple food stock within 6 days
    - there was an issue with some of the data collected from Koboko on staple food
- 87% of traders said they could increase NFI stocks within 6 days
- 79% of traders said they could increase product asset/tool stocks within 6 days

Alternative market suppliers

The majority of the traders spoken to indicated that they had an alternative supplier that they could use in order to scale up stock. The following additional points on alternative suppliers were noted:

- The diversity of source markets (over 37 identified) as both their current supply source and potential alternate sources indicate that the settlement markets are fairly well integrated across the district. (Source markets represent marketplaces where commodities can be procured.)
- The speed with which traders have been able to respond to increased demand so far also indicates that these are fairly elastic markets.
- Despite this initial response, access to transportation was repeatedly raised by South Sudanese interviewees as a significant constraint and the ongoing ability to move goods across the district and between marketplaces should be monitored.

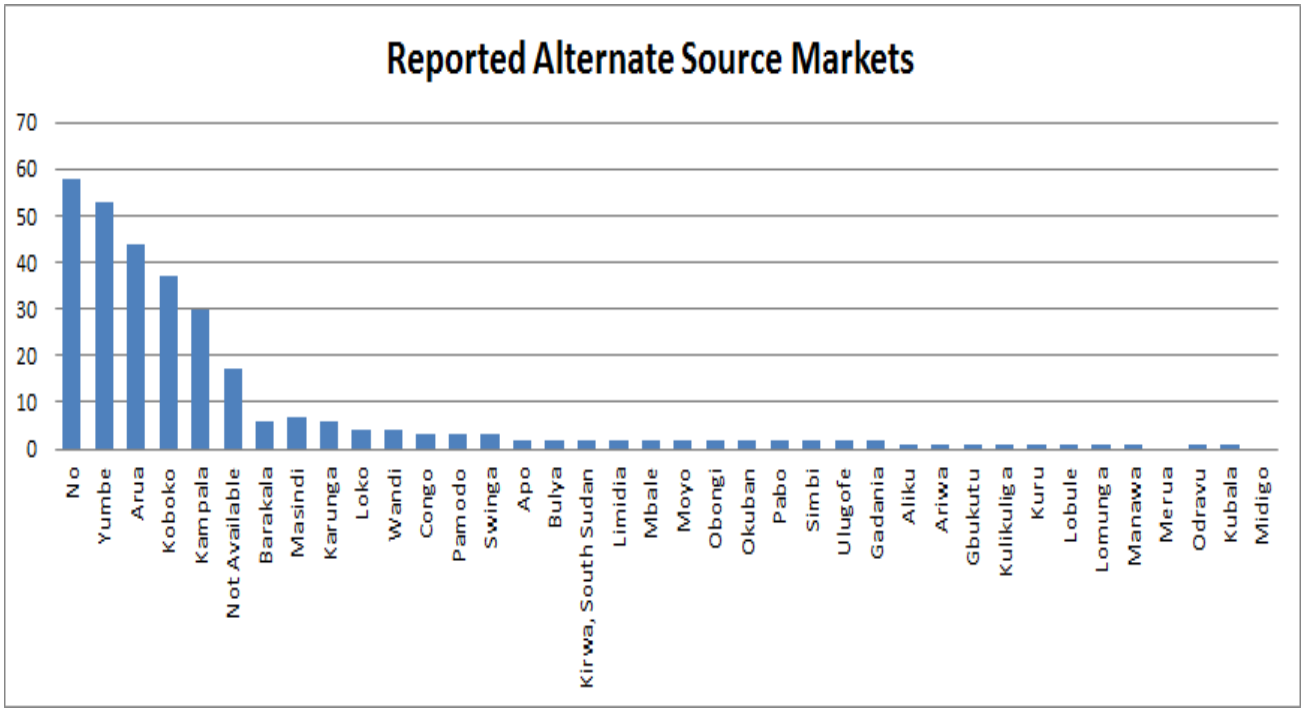


Figure 9: Sources of goods reported by all traders spoken to

Settlement Market Supply Sources

Respondents in all of the settlement marketplaces reported a number of different markets and suppliers that they currently sourced items from. Although all marketplaces included Arua, Koboko, and Yumbe as important source markets, there was still significant diversity.

In each location, with the exception of zone 2, none of the respondents lacked access to alternate suppliers should they need to rapidly increase their stock or need to shift suppliers.

Zone 1

- Respondents identified 5 different markets they could source from
- 4 respondents indicated that they lacked alternate supply sources should their current supplier be unable to meet increased demand

Zone 2

- Respondents identified 9 different markets they could source from - including Swinga market as an alternate source
- no respondents indicated that they lacked alternate supply sources should their current supplier be unable to meet increased demand

Zone 3

- Respondents identified 8 different markets they could source from
- 12 respondents indicated that they lacked alternate supply sources should their current supplier be unable to meet increased demand

Zone 4

- Respondents identified 6 different markets they could source from
- 5 respondents indicated that they lacked alternate supply sources should their current supplier be unable to meet increased demand

Zone 5

- Respondents identified 7 different markets they could source from

- 3 respondents indicated that they lacked alternate supply sources should their current supplier be unable to meet increased demand

5.3 Timeframe to supply

Bidibidi Settlement Marketplaces

The value of knowing the frequency of when retailers restock key items is essential when considering a cash based response. The following can be noted from the retailers within the Bidibidi settlement marketplaces:

- 67% of retailers selling fresh foods in Bidibidi restock more than once per week
- 67% of retailers selling staple foods in Bidibidi restock more than once per week
- Only 21% of retailers selling NFIs in Bidibidi restock more than once per week
- One of two retailers that had productive assets/tools available said they restocked more than once per week

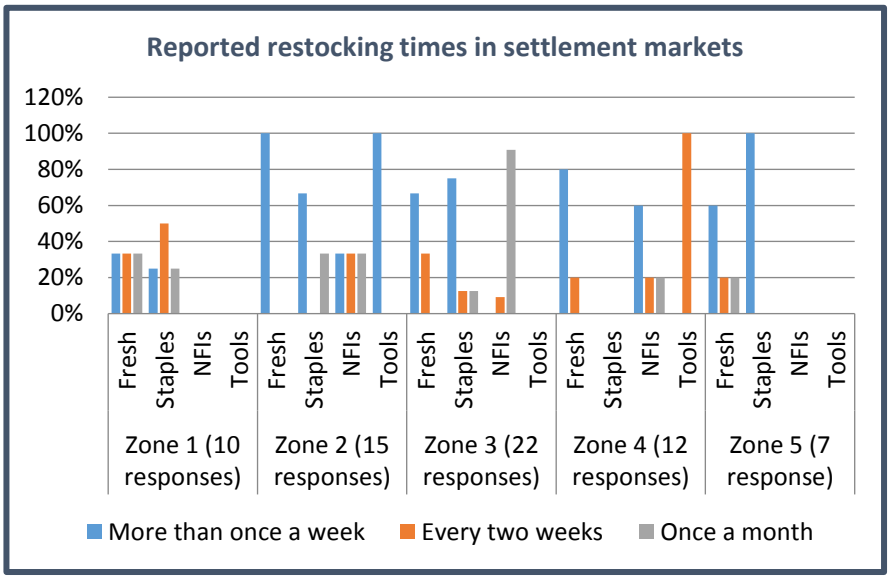


Figure 10: % of traders indicating restocking times

*there were pockets of data with incomplete answers

Ugandan Feeder marketplaces

Currently the demand for goods within the Ugandan towns remains constant. The traders – both retailers and wholesalers – indicated the following:

- Fresh foods are restocked more frequently than other goods surveyed – 41% of traders selling fresh foods restock more than once per week
- 29% of traders selling staple foods restock more than once per week
- 23% of retailers selling NFIs restock more than once per week
- Tools/productive assets are restocked with far less frequency and often only once per month depending upon demand

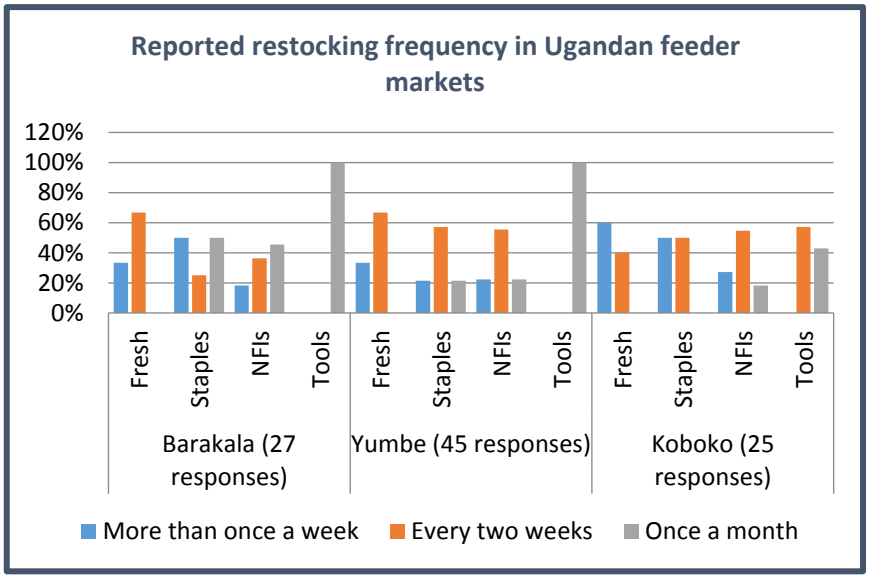


Figure 11: % of traders indicating restocking times

5.4 Storage/warehousing

Bidibidi Settlement

Zone 1

As the marketplace has been around the longest, there are a higher number of secure and semi-secure structures now in existence where the retailers are storing their goods.

Zone 2

The marketplaces within the zone continue to grow but do not necessarily have storage spaces for the moment. A number of the Ugandan retailers choose not to leave their goods within the settlement and bring them back home. The remaining retailers from within the settlement all store their goods in their home. Some indicated that they do not store goods in the marketplace because of their shop was only a temporary structure, something that may change within time.

Zone 3

The marketplaces of zone 3 are still in the process of development. Large numbers of unused temporary market stalls have been built in preparation for this growth.

Zone 4

The marketplaces assessed in zone 4 included the Ugandan trading centre of Lomonga. It already has established structures for trade. The other marketplace was within the settlement.

Zone 5

Within zone 5, OPM/UNHCR has relocated the reception centre. Immediately retailers started opening for business nearby. All of them are Ugandan and bring stock with them every day.

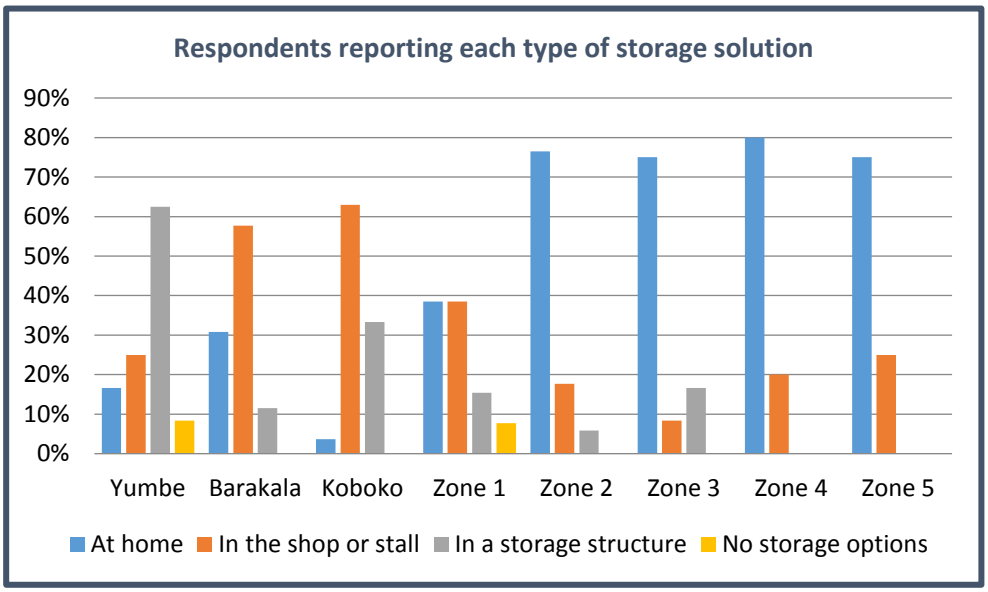


Figure 12: % of traders who indicated various types of storage options

Ugandan Feeder Markets – Koboko, Yumbe, Barakala

All of the marketplaces assessed within Ugandan towns have established structures for sales and warehousing. Most of them store goods within the town they are in while one of the wholesalers also has storage in Arua. As a number of wholesalers were spoken to, it is expected that they would have such warehousing capacity.

5.5 Competition

Bidibidi Settlement Marketplaces

Competition across the settlement is beginning to grow with more and more retailers selling similar goods that the refugee population are demanding. Figure 15 below demonstrates an accumulated average of the number of shops selling similar goods. The range of competition varies zone by zone and is a clear indication of how long each settlement marketplace has been in existence given the least amount of competition in zones 4 and 5. In zone 1 on the other hand there is plenty of existing competition where there are as many as fifty shops selling similar goods (common items) and as few as 7 for other items.

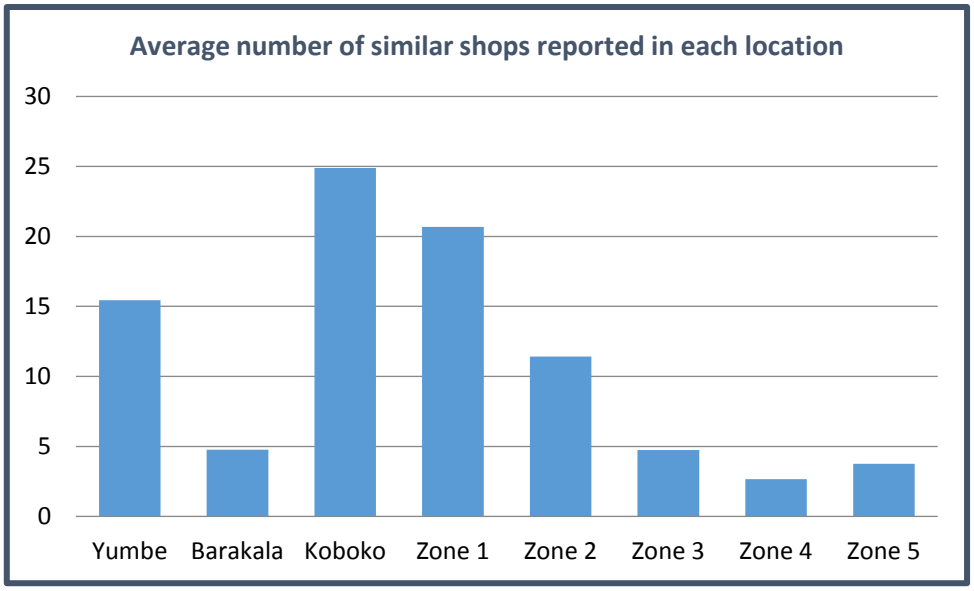


Figure 13: The cumulative average of competition in each marketplace

Ugandan Feeder Marketplaces

Within the Ugandan marketplaces the competition is of course much higher given the larger number of traders present. The assessment has shown that there are as many as 100 shops selling similar items in Koboko and Yumbe (for common items) and as few as 1 or 2 (for specialty items).

5.6 Access to credit

The existence of newer marketplaces within Bidibidi settlement have not been an impediment to the system of 'goods on credit'. Indeed the number shops that offer goods on credit are of a lower percentage than shops within the marketplaces of Ugandan towns, but they are emerging nonetheless. Zone 5 is an exception of course as everything occurring there currently is in a state of flux with so many new arrivals coming in and being settled. It is quite likely that once people are settled into their assigned locations, the retailers there will likely begin to offer commodities on credit. Furthermore, there are far fewer shops operating within zone 5 currently. This is also likely to change in the near future.

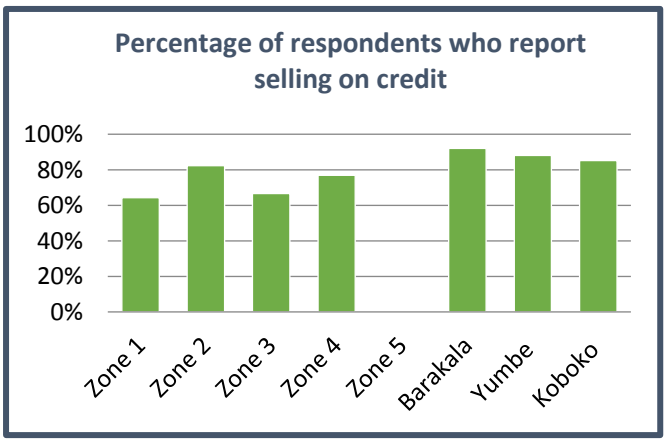


Figure 14: the % of traders who offer goods on credit

For the vast majority of traders that are offering goods on credit, those surveyed indicated that less a quarter of their customers receive credit.

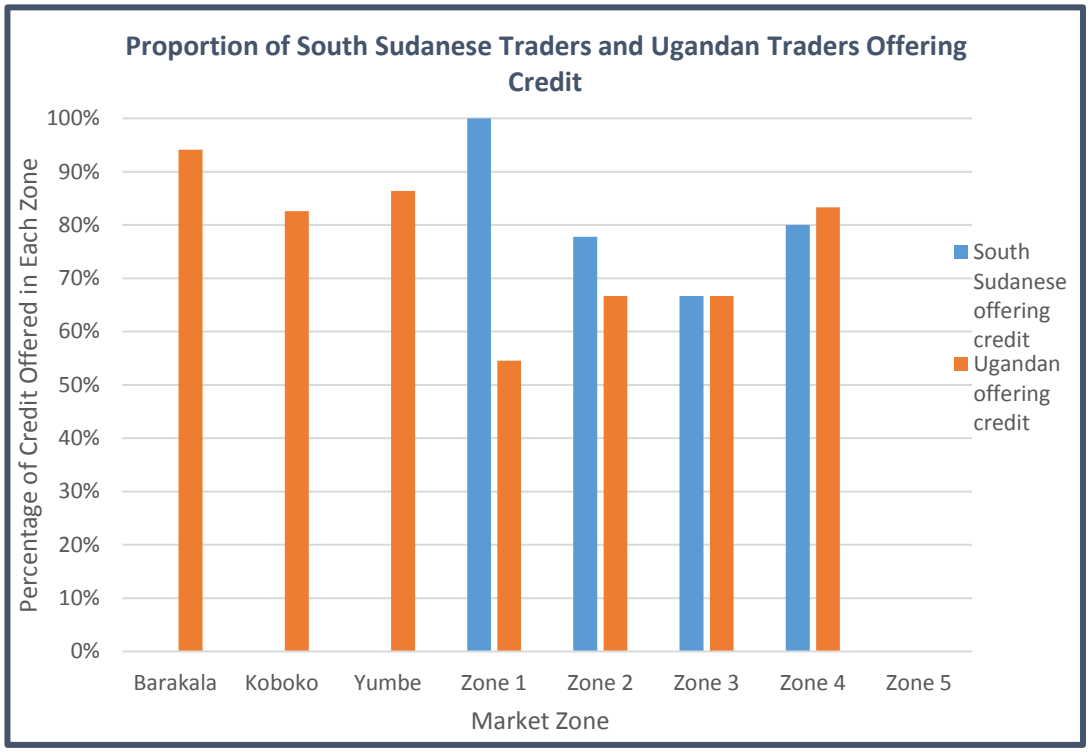


Figure 15: Nationality of traders selling good on credit

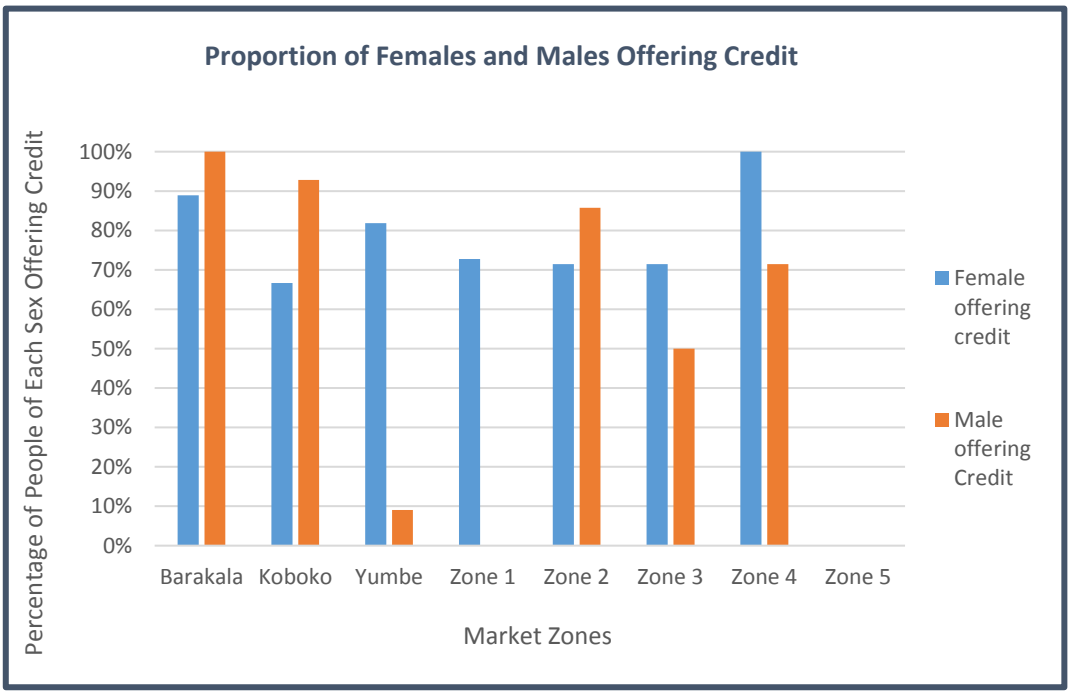


Figure 16: Sex desegregation of traders selling good on credit

Supplier Credit

Of the traders surveyed, a large number indicated that they could access credit from their suppliers so long as they hold a good 'standing' of credit with them, promptly paid past debts, and have established a relationship of trust. The credit terms varied but often ranged from 5 days to 60 days for payment to be made. Access to such credit is often relationship based.

A number of the Ugandan traders from Koboko, Yumbe and Barakala indicated that they were able to access credit from alternative sources other than their suppliers. Those sources included SACCOs, Village Savings and Loans groups, banks and family members.

Receive credit or loans from sources other than their suppliers	
Zone 1	8%
Zone 2	0%
Zone 3	13%
Zone 4	0%
Zone 5	0%
Barakala	31%
Yumbe	5%
Koboko	14%

Receive credit from suppliers	
South Sudanese	33%
Ugandan	63%

**** Percentages includes respondents that replied only**

6. Challenges and solutions that trader and their businesses face

As a part of the assessment discussion, all retailers and wholesalers were asked about the three main factors that make it difficult for them to increase stock and grow their business. They were also asked about how they felt those factors could most effectively be address. The answers were left open and some of the feedback is as follows.

Bidibidi Settlement Marketplaces

The key blockages to growing business as expressed by these traders included:

- Lack of storage
- Capital
- Few buyers of goods – low demand
- Transport

The solutions to those blockages included:

- Access to loans
- Improving the road network
- Improving storage of goods
- Skills development

Ugandan Feeder Marketplaces

The key blockages to growing business as expressed by these traders included:

- Lack of capital to increase size and volume
- Expensive transport – poor roads
- High competition in the marketplace
- Low demand for goods currently – low turnover

The solutions to those blockages included:

- Borrowing/loans
- Increased demand
- Improve road network
- Better storage solutions
- Skills training

7. Opportunities for market based interventions to support markets

Ugandan Feeder Marketplaces

As these are permanently established marketplaces within existing towns, there is no immediate need to support markets or traders. Retailers and wholesalers are functioning, there is some access to credit available and for the most part, additional capacity to increase stock exists. (Lack of credit was also cited as a barrier for some of the traders)

Bidibidi Settlement Marketplaces

The potential for market support exists across all five zones of Bidibidi. Marketplaces are up and functioning and continuously growing and developing, literally week-by-week. The existing development of the settlement marketplaces is dependent upon when the settlement zone was first opened by OPM. The various zones are of course at various stages of development. New retailers are constantly arriving and with them more goods and services that likely to be in demand by the newly arrived refugees.

It is possible that income generating activities, savings and loans groups and the like could potentially invigorate the marketplace growth and bring about the level of supply needed for broader use of cash transfers.

8. Market related considerations that require attention or further analysis

- The rapid growth of the marketplaces across the settlement are causing concern for the much-needed sanitation of such locations. Waste management is an ongoing concern from traders, consumers and community leaders. This should be brought to the attention of the WASH cluster.
- As Zones 4 and 5 are, the newest settlement areas the marketplaces there should be monitored more closely as they are the least developed.
- Some of the Bidibidi marketplaces do not necessarily operate at full functionality until after 4pm – they need to be observed and prices taken after that point.
- Regulations, fees, and procedures to set up businesses in the impromptu marketplaces varies significantly. There were some reports of “landlords” demanding taxes or fees to operate businesses in the marketplace, and lack of clarity as to their actual authority to do so.
- Limited productive assets in settlement marketplaces: Initial observations indicate that the only productive assets reported for sale in the zone markets were resold distributed agriculture tools. This is likely to shift with the seasons for planting.
- Within nearly all of the marketplaces assessed, recently distributed relief items were found to be available for sale - pangas, solar lights, kitchen sets, tarpaulins, jerry cans - at prices severely reduced from what the agency/organization had paid for them. As a number of the retailers now selling these items are from Uganda, the items are making their way out of the settlement, and in some cases have started to impact Ugandan marketplaces as the demand and pricing of such products is diminishing
- To follow the quality of goods being brought for sale within Bidibidi. As there is no formal registration in some of the marketplaces as of yet, there could be the opportunity to take advantage of the refugees who are desperately in need of goods and services
- Access to credit: Respondents across the spectrum of interviews raised the lack of access to credit facilities as a significant challenge for them to start businesses or replace productive assets they left in South Sudan. However, with the exception of zone 5, more than 60% of traders in the settlement locations reported that they regularly provided items on credit to their customers.

- Transportation services: Limited and expensive transportation options were raised as a key barrier to expansion across all locations and type of respondent interviewed.
- Storage: Limited or no safe storage facilities were reported as a key constraint to business expansion across the settlement marketplaces. Most refugee traders reported keeping their stock in their shelter with them at the end of each day, and raised concerns about the security of doing so.

9. Assumptions and limitations faced in the assessment that users of RAM Report must be aware of

- The process of rolling out the RAM to such a large number of traders across so many different markets made it difficult to generate complete information from all sources. We experienced incomplete or partial records of information imputed into the data collection – leaving some of the data partially skewed. As a result it took some time to clean the data records up prior to any analysis taking place
- One day of training for the enumeration team was not enough given the size of the task and number of traders they needed to speak to
- During the assessment, food distributions were ongoing in a couple of locations and this may have influenced the perception of prices and availability of goods. It also affected the availability of some people that we intended to interview. The same occurred while a registration exercise was undertaken.
- It is assumed that the growth of the marketplaces within the settlement will continue and more and more good and services will become available to meet the increasing demand
- It is assumed that Bidibidi will evolve in a similar manner to Adjumani and that the refugee population will slowly adapt to life in the settlement

10. Implementation experience in the area and related lessons learned, and activities planned or being implemented by other agencies

Currently there is only one organization implementing using cash transfers in Bidibidi. This is likely to change in 2017 given the experiences from Adjumani and other refugee settlements in Uganda. Given OPM's policy towards refugee settlement, the use of cash transfers paired with skills support and education appear to be likely opportunities for the humanitarian community to jump start livelihoods for this newly affected population.

There is an HEA (Household Economy Analysis) planned at the start of 2017 for the livelihood zones of the Ugandan population in Yumbe District in order to better determine how the varied skill sets of the refugee population in Bidibidi can be used to further the economic growth of the District as a whole. Observing the livelihoods of the locals will enable organizations to take a more informed decision towards what might work for the refugees in terms of linkages to jobs, networks, and markets.

A cash working group (as a part of the livelihoods cluster) is being discussed and will soon be rolled out in Bidibidi in order to improve upon the coordination and linkages between organizations planning to deliver cash and market based responses.

Annex I – Marketplace Differentiation

Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Ugandan Feeder
Bidibidi 2	Swinga	Yoyo 2	Lomonga	Ariwa	Koboko
Tranjiji	Swinga Koro	Kigo	Abirimajo	Karunga	Yumbe
Point 0 market		Yoyo 4		Zone 5 market	Barakala

Key

1. Ugandan trading centres
2. Settlement markets
3. Ugandan feeder markets

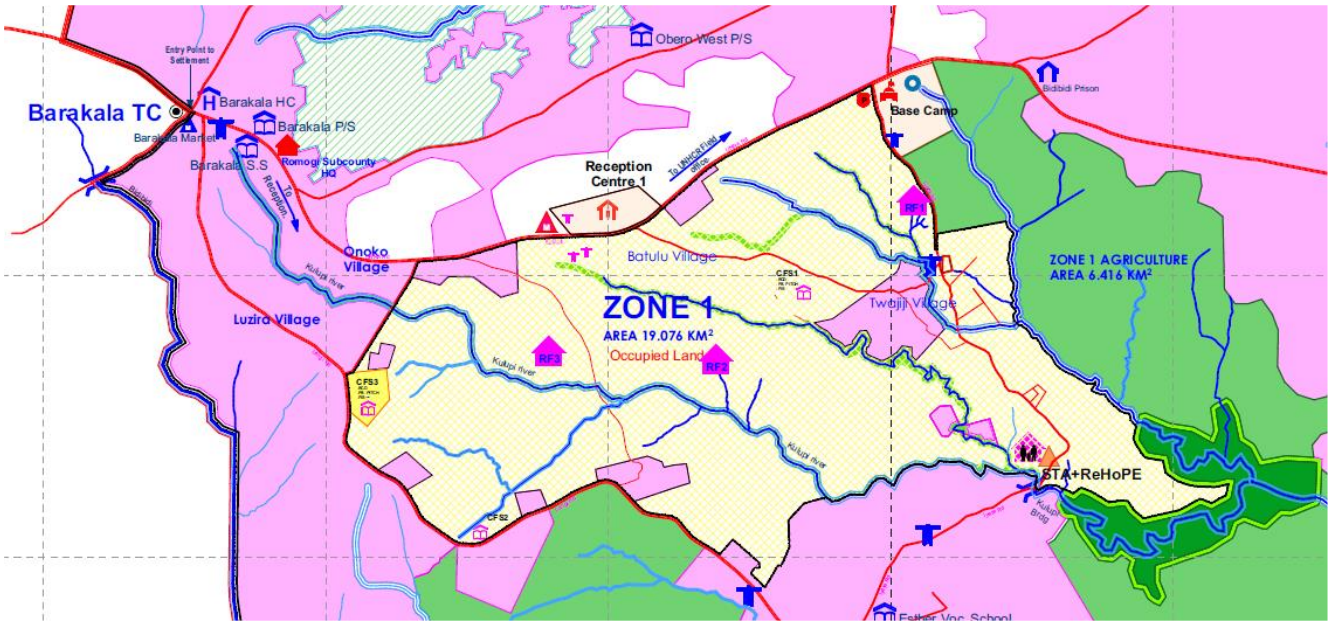
Annex II – Observations during the assessment

	Settlement Date	General Observations
Refugee Settlement Zones		
Zone 1 Point 0 Tranjiji Bidibidi 2	Aug. 3rd	• Largest market in the settlement, with clear diversity of goods and some services (ie restaurants), although no productive assets were available • Youth are starting businesses, using some small savings that they brought with them. • Increasing number of forex/money exchangers trading in South Sudanese currency to Ugandan • Mix of Ugandan and South Sudanese consumers • Very active as close to the original reception centre and the oldest settled zone • Growing number of income generating activities by individual households engaging in selling items
Zone 2 Swinga Swinga-Koro	Early September	• Traders are able to supply fresh foods and basic NFIs, but there were no productive assets available. • There were distribution items for sale, but traders were hesitant to provide much information about them. • The market had expanded since the reference point in response to increased demand as people settled. • Many traders were from the surrounding markets (notably Yumbe and Koboko). • Some community/market leaders are starting to collect dues or a fee for having stalls setup.
Zone 3 Yoyo 2 Kigo Yoyo 4	Late September	• Goods are available, albeit nothing in the way of productive assets. • A new marketplace is opening up at the crossroads, with a large number of stalls being erected. • Good are coming in from Arua, Koboko and Kampala. • There was a mix of Ugandan and South Sudanese traders operating. • The host community and refugee population have engaged one another and have contributed joint market chairpersons.
Zone 4 Lomunga Abirimajo	Late October	• Fees of some kind were being collected in the marketplace, although the authority of those doing so was unclear and respondents had indicated they were moving to sell from their homes instead of in the market center to avoid this. • Youth were looking for employment and small business opportunities. • Market picks up mainly later in the day. • Sales primarily based on newly created demand with locals supplying their own produce. As in zone 5, this may cause local shortfalls in the coming months.
Zone 5 Ariwa Korunga Zone 5	Nov. 4th	• A small number of stall and trading shops opened next to the reception center within the first few days of people arriving. • Market actors in the Ugandan village closest to the reception center have responded by significantly increasing stock and bringing key items that they anticipate the refugee population would require.

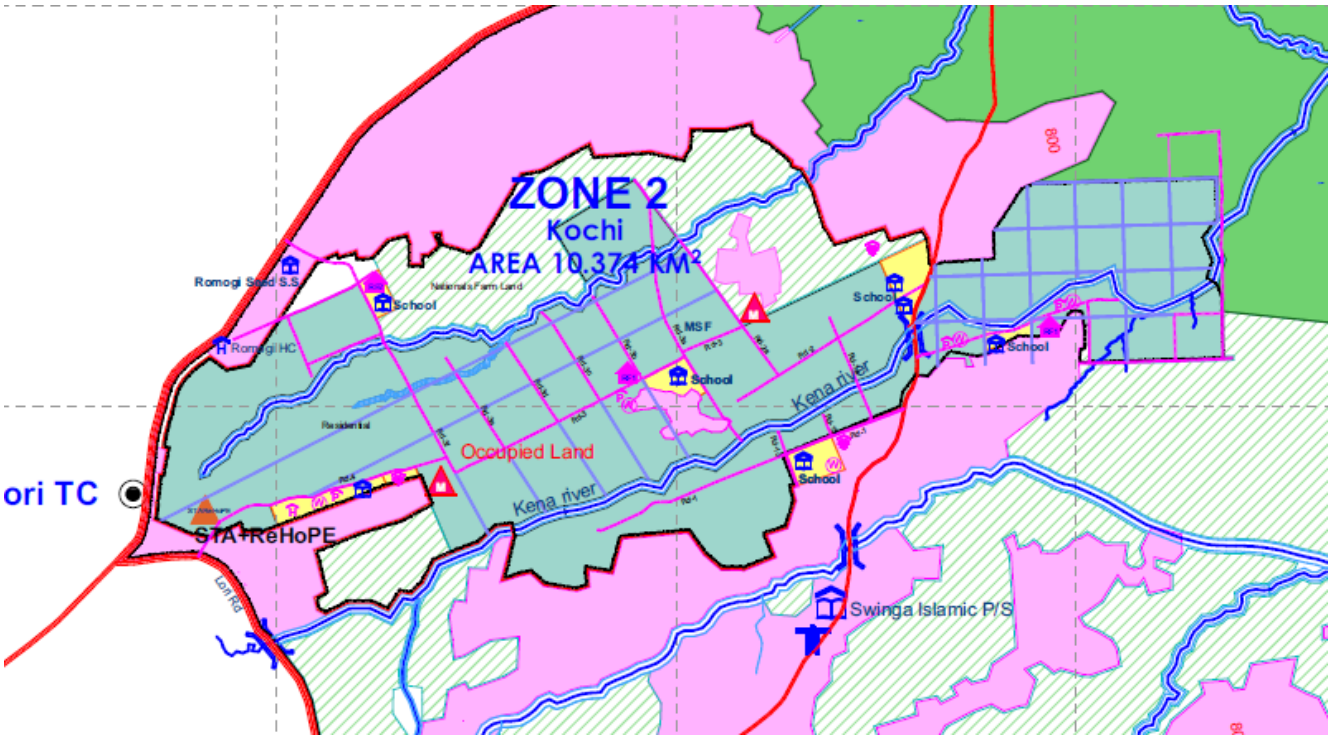
		• Locals are beginning to sell off their produce and goods to the incoming refugees. This raised concerns for some about potential shortages in the coming months.
Ugandan Feeder Markets		
Barakala	• There is limited trader capacity to fully respond to increased demands • Not all key commodities were available in sufficient quantities, particularly productive assets. • Issues about inadequate food supply and limited number of grinding mills available were raised as points of potential tension within the settlement.	
Yumbe	• All items were generally available at decent quantities. • Some of the mass distribution items - such as jerry cans - are diminishing the demand for these goods within the town, and traders spoke of reducing their stock. • Wholesalers possess the capital to scale up stock should the demand arise. Average restocking time for wholesalers was two weeks. • Active market authorities, chairpersons involved,	
Koboko	• The market continues to grow and there is very high demand for the available infrastructure such as stalls, stores and shops. Therefore, these facilities are insufficient to meet the current demands. • The demand for staple food such as cassava and maize flour is high. This is attributed to the increasing population as a result of the South Sudan refugee influx. Both the refugee and local population have common staple foods. In addition, there are a number of schools in the municipality that also increase the demand for the same commodities (beans, cassava flour and maize). • Prices change due to the seasonality of agricultural products such as ground nuts, maize and beans. • Insecurity from South Sudan has affected traders who previously exported to South Sudanese markets. Similarly, the decline in exchange rate for South Sudanese pounds was reported as a challenge.	

Annex III – Map of Bidibidi Settlement

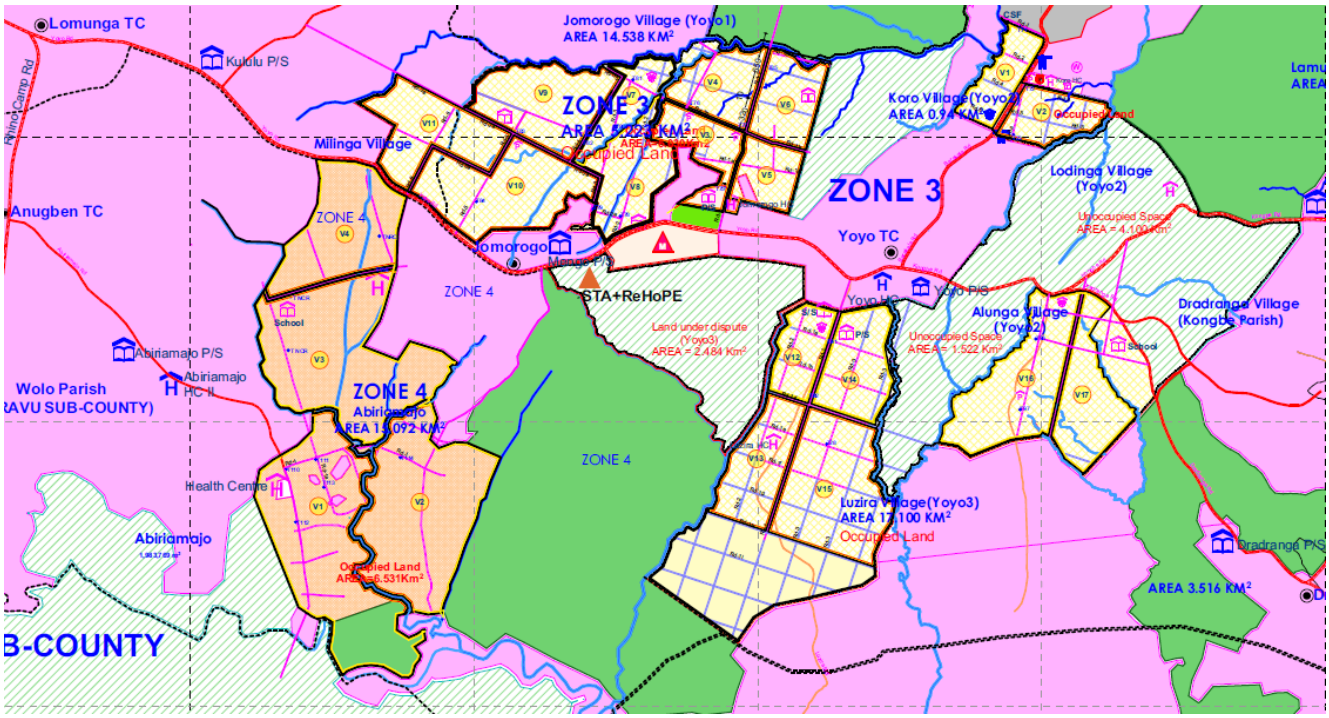
Zone 1



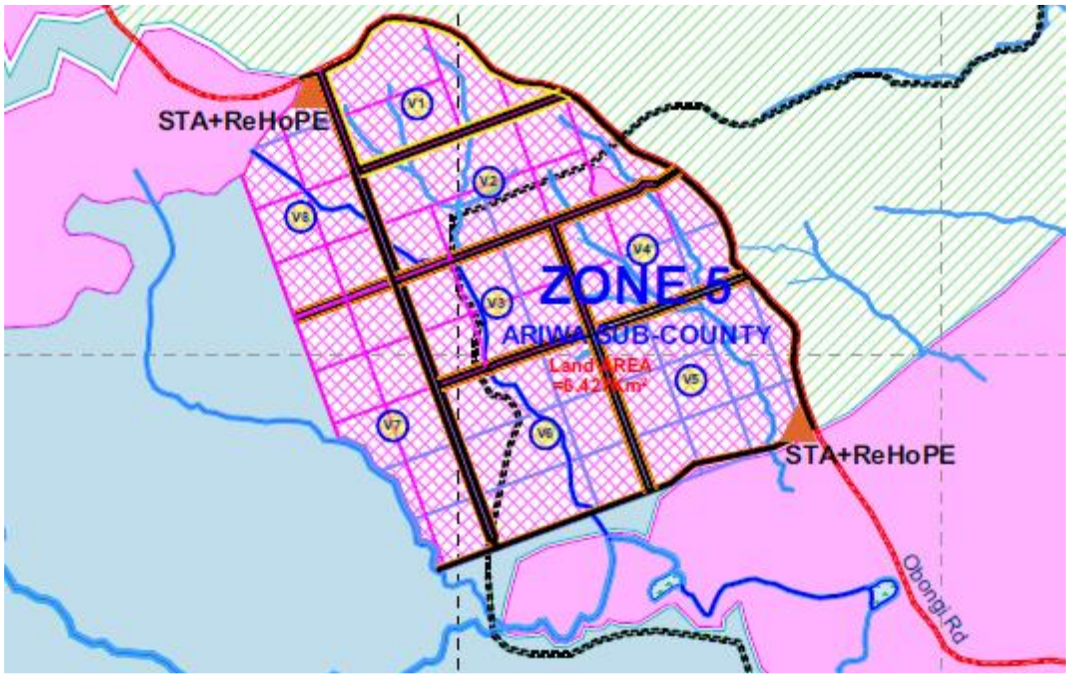
Zone 2



Zone 3 & 4



Zone 5



Annex IV – Seasonal Calendar Yumbe District

YUMBE DISTRICT AGRICULTURAL CROPPING CALENDER													
S/N	**PLANTING SEASON & AVAILABILITY OF COMMODITIES**	**JAN**	**FEB**	**MAR**	**APR**	**MAY**	**JUN**	**JUL**	**AUG**	**SEPT**	**OCT**	**NOV**	**DEC**
1	**Vegetables**												
	Planting												
	Availability time												
2	**Fruits (Mangoes, Citrus, Jack Fruits, Ovacado, Pawpaw)**												
	Planting												
	Availability time												
	Mangoes												
	Citrus												
	Jack fruits												
	Pawpaw												
	Avacado												
3	**Pulses (Beans, Pigion Peas, Cow peas, green gram)**												
	Planting												
	Availability time												
4	**Cereals (Maize, Millet, Sorghum, Rice)**												
	Planting												
	Availability time												
5	**Oil Seeds (Ground nuts, Soya beans, Sunflower, Simsim)**												
	Planting Time												
	Availability time												
6	**Root Tubers (Cassava, Sweet Potatoes)**												
	Planting Time												
	Availability time												
	Cassava												
	Sweet Potatoes												