Measuring Citizens' Perceptions of Agricultural Market Access in Northern Uganda

A case of Gulu and Lira Districts

SEATINI

Southern and Eastern African Trade Information and Negotiations Initiative

Measuring Citizens' Perceptions of Agricultural Market Access in Northern Uganda

Women in Gulu preparing agricultural produce

A case of Gulu and Lira Districts[1]

October, 2013

"Poverty begins with failure to take advantage of existing market opportunities."

- Bernet T., Thiele G. and Zschocke T, 2006

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Acronyms

ADBI	Asian Development Bank Institute
AfDB	African Development Bank
ALREP	Agricultural Livelihood Reconstruction Enhancement Programme
CIS	Community Information System
CRC	Citizen Report Card
CSOs	Civil Society Organisations
CSPro	Census and Survey Processing System
DDP	District Development Plan
EAC	East African Community
FGDs	Focus Group Discussions
GDP	Gross Domestic Product
GDP	Gross Domestic Product
IDPs	Internally Displaced Peoples
KCC	Kampala City Council
LC	Local Council
LG	Local Government
MoFPED	Ministry of Finance, Planning and Economic Development
NAADS	National Agricultural Advisory Services
NGO	Non-Government Organisation
PAC	Public Affairs Centre
PMCA	Participatory Market Chain Approach
PPS	Probability Proportion to size
PRDP	Peace Recovery and Development Plan
S/C	Sub County
SACCOs	Savings and Credit Cooperative Organisations
SEATINI	Southern & Eastern Africa Trade Information & Negotiations Institute
UBOS	Uganda Bureau of Statistics
UMI	Uganda Management Institute
VSLAs	Village Savings & Lending Associations
WFP	World Food Programme

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Executive Summary

This survey was conducted in Gulu and Lira districts to measure the citizens' perceptions of agricultural market access using a Citizen Report Card (CRC) methodology. The objective was to assess small holder farmers' experiences in access to markets for their agricultural produce. The study found that access to markets is a big challenge to most small holder farmers mainly due to lack of market information, poor infrastructure (such as roads and market places), exploitation by traders (buyers) and minimal support from government and the private sector.

An overwhelming majority of the farmers are dissatisfied with the overall access to markets of their agricultural produce. The very low level of satisfaction with market access is a critical issue of concern for policy makers, since access to markets has a bearing on improving livelihoods of most smallholder farmers in Uganda.

The end of the LRA rebellion in 2006 and the reigning peace in Southern Sudan, led to new opportunities especially in the area of agricultural markets for the people of Northern Uganda. Despite the opportunities brought on by these market opportunities and the efforts by the local population to take advantage of them, farmers in the northern region lag behind farmers in other regions of the country. Access to markets for agricultural products is a primary constraint to increasing income and improving their livelihoods of most households in northern Uganda.

It is against this background that SEATINI-Uganda conducted this study in the districts of Gulu and Lira to determine the satisfaction levels of the farmers with market opportunities available to them. The study focused mainly on market opportunities for Sunflower, Simsim, Cassava and Maize as such crops that are on high demand both within the region. The methodology employed in this study combined quantitative research with qualitative findings obtained from focus group discussions (FGDs). A total of 666 respondents (344 in Gulu and 332 in Lira) were interviewed for the survey.

Some of the key findings include:

Access to Markets

- Generally, majority (73.2%) of the households interviewed reported to have sold any agricultural produce during the last one year.
  - More than half (57.7%) of the households sold their produce in a market (mainly village and assembly markets). This was followed by those who sold their produce at home (50.4%) and stores/ warehouses (16.8%).
  - Majority (79.9%) of the households sold their agricultural produce to individual traders. This was followed by friends/neighbours (14.9%).
  - Majority (85.7%) of the private sector actors interviewed reported that they bought most of their agricultural produce directly from farmers.

- *Distance to the Market:* Majority (82.6%) of the households sold their produce within a distance of 5Kms. Implying that access to markets may no longer be defined in terms of distance to point of sale, but rather in terms of the ability of farmers to obtain and negotiate for a remunerative price.
    - o 42.3% used bicycles and 32.2% used feet to transport their produce to the market. Only 7.3% used vehicles.
- *Market information*: Majority of the households get market information from individual traders (59.4%), family /friends or neighbours (51.5%), company traders (48.5%), radio / television (26.6%), own research / visiting markets (11.5%) among others.
- *Group Marketing*: Only 27.1% of the households were a member of group. However, even those who reported to be members of a group, very few (16.8%) were engaged in group marketing.

Reliability of agricultural markets

- *Contract farming*: Despite the benefits accruing to smallholder farmers from engaging in contract farming, very few farmers in the study district are engaged in contract farming. Only 4.2% of the households interviewed were engaged in contract farming.
- *Rating of market access of agricultural produce*: Farmers reported an improvement during the last one year in the market for rice and Simsim and the lowest improvement in the market of Soya Beans and sunflower. On the other hand, the private sector actors interviewed believe that there has been some improvement in market access over the last one year.

Key Constraints to access to markets

- *Exploitation by buyers of agricultural produce*: The relationship between the farmers and the buyers seems to be shaky; with most households reporting that they are exploited by the buyers of their produce. Overall, 79.2% of the households reported that they are exploited.
    - o Most households (90.2%) reported that they are exploited by individual traders. This is followed by friends / neighbours (30.8%), companies (21.7%).
    - o Most farmers reported that they are exploited through lower prices (70.5%), minimal information is provided by the buyers (16.4%), and inaccurate weighing scales (16.4%).
- *Inadequate organisations /companies helping farmers to access markets*: Overall, very few farmers (only 21.1%) are aware of the organisation /company helping farmers to access markets.
- *Minimal Government support in helping farmers to access markets*. Most farmer interviewed, think such programmes are not helping them to access markets. They believe government has left them to the realms of the private sector.
- *Other constraints*: low prices offered; lack of market information; high transport costs; long distances to the markets; high market dues; poor storage facilities; high labour costs; and poor communication (i.e. telephone network).
-

Satisfaction with access to markets

- *Overall satisfaction*: Farmers were asked if they were satisfied with the overall access to markets of their agricultural produce. They were provided with five options: very satisfied, fairly satisfied, not very satisfied, and dissatisfied.

  - o Nearly half (46%) of the farmers were not very satisfied, 35.8% were dissatisfied. Only 0.3% and 17.9% were very satisfied and fairly satisfied, respectively.
  - o Overall, 29.8% of the farmers were satisfied with the market for Simsim; 41.7% were fairly satisfied with the market for rice; 44.9% were not very satisfied with the market information especially on the prices; and 74.5% were dissatisfied with the support provided by government towards agricultural marketing.

- *Reasons for Dissatisfaction*: lower prices, bad roads, high market dues, lack of market information, price fluctuations, and high transport costs featured prominently among the reasons. Lack of government support and use of inaccurate weighing scales by buyers were also among the reasons for dissatisfaction.

In line with the above findings, we, therefore, suggest the following recommendations for action by different stakeholders, such as government and non-governmental organisations in order to improve agricultural marketing.

Government

a. *Needs to* encourage and support the formation of farmer groups and cooperatives as an important strategy for improving agricultural marketing.
b. *Needs to in*crease investment in the districts, and community access road construction and maintenance in order to increase accessibility of farmers to marketing centres all year round.
c. *Needs to* support farmers to establish community storage facilities which will help provide common storage facilities. In addition, government needs to sensitise and expand the Ware House Receipt system that will help to stabilise prices and also act as collateral for obtaining credit by farmers.
d. *Needs to* establish market and trade information centres in all districts so as to boost both domestic and export marketing.
e. Government needs to provide targeted subsidies to smallholder farmers geared towards improving the quality of produce; these can be channelled through their groups or associations.
f. Government should regulate activities of the traders such as adherence to quality and standard weighing facilities.
g. Needs to improve the legal framework on contract-farming. For instance, contracts signed between farmers and buyers should be witnessed by local governments.

Farmers and Traders

a. Should embrace relationship marketing; where collaboration between farmers and traders is more structured.
b. Farmers should establish strong associations to help them improve the reliability and quality of their produce and contract obligations with traders.
c. Embrace group marketing in order to reduce constraints to market access and increase their bargaining power.
d. Need to strengthen their (farmer group) capacity to produce quality and a high volume of products.

NGOs

a. Need to advise, train and encourage farmers to develop a cooperative culture through formation of SACCOs and Village Savings and Lending Associations (VSLAs).
b. Need to educate farmers on how to deliver quality produce and post harvest handling.
c. Advocate for local procurement of food by international organisations such as World Food Programme.
d. Should direct their attention not only to the protection of smallholder farmers, but also invest in improving relations with the informal traders.
e. Should advocate for increased funding of the agricultural sector by government, especially in the area of market access.
f. Should encourage Participatory Market Chain Approach (PMCA) in order to engage smallholder farmers with other market chain actors, to improve market access.

Chapter 1: Introduction

This survey was conducted in Gulu and Lira districts to measure the citizens' perceptions of agricultural market access using a Citizen Report Card (CRC) methodology. The objective was to assess smallholder farmers' experiences in access to markets for their agricultural produce. The study captured farmers' experiences with access to their agricultural markets through interviewing sampled households in the two districts. A CRC is one of the social accountability tools, which citizens can use to demand improvement in the quality of provision of services. The CRC is a simple and credible tool used to provide a systematic feedback to public agencies about their performance. The CRC provides a summative satisfaction score that captures the totality of critical service-related parameters (ADB & ADBI, 2007).

By collecting feedback on the quality and adequacy of public services from actual users, the CRC provides a rigorous basis and a proactive agenda for communities and civil society organisations to engage in a dialogue with government and service providers to improve the delivery of public services (PAC, 2012).[2] The tool not only facilitates prioritisation of reforms and corrective actions but also provides a benchmark on the quality of public services as enjoyed by citizens.

1.1 Rationale

Most households in Uganda directly or indirectly derive their livelihood from agriculture. Over 75% of Uganda's households are engaged in agriculture and 66% derive their livelihoods from subsistence agriculture. Agriculture in Uganda is dominated by small farmers, working on an average plot of 1.7 acres, and who produce 96% of the food that passes through the market outlets in the country (WFP, 2009). Most smallholder operations occur in farming systems with the family as the centre of planning, decision-making and implementation, operating within a network of relations at the community level (AfDB, 2010). The key long-standing challenges of the smallholder farmers, is low productivity stemming from among other factors, lack of access to markets. For many farmers, there are few opportunities to sell surplus production in local markets (Action Aid, 2010).

During and after the structural adjustment period of the late 1980s and early 1990s, government rolled back towards directly funding agricultural development. The privatisation of public enterprises and the liberalisation of the economy increased private sector involvement in the agricultural sector at all levels of the value chain. Currently, most of the private sector is mainly engaged in input supply, processing and marketing of agricultural produce both within and outside the country. The East African Community (EAC) integration has opened up a number of opportunities for the agriculture sector, especially in providing market alternatives

2 http://www.pacindia.org/publications/tool-kits/citizen-report-card-crc-too/

for small scale producers. However, these opportunities have been exploited by large scale and well organised farmers, and farmers in the more relatively peaceful parts of Uganda. Consequently, farmers in Northern Uganda have not fully benefited due to long periods of insurgency at the hands of the Lord's Resistance Army (LRA) rebellion.

The end of the LRA rebellion in 2006 and the signing of a Comprehensive Peace Agreement in Sudan, led to a new surge of opportunities, especially in the area of agricultural markets for people in Northern Uganda. People returned to their homes from Internally Displaced Peoples (IDPs) camps and revived farming. Consequently, the region has attracted several investments in agriculture particularly investors in beer and sunflower oil production. These investments have mainly increased the production of sunflower and sorghum which are used as raw materials in the production of oil and beer. According to the 2012 UBOS statistical abstract, the Northern region produced up to 177,008 Metric tonnes of sorghum and 93,562 tonnes of simsim.

The production has also been further enhanced by the demand for food in South Sudan, Ethiopia and Kenya, among others. The increase in trade with Sudan is attributed to the relative political stability in both Northern Uganda and Southern Sudan, and, the recovery efforts being pursued by the Government of Southern Sudan that increased the demand for consumer and producer goods.

In spite of the opportunities brought on by these market opportunities and the efforts by the local population to take advantage of these opportunities, farmers in the northern region lag behind farmers in other regions of the country. Farmers have not had a significant impact in terms of increased incomes hence resulting in improved livelihoods. According to the 2012 Poverty Status Report[3], 24.5% of the Uganda population lived in absolute poverty; however, the poverty in the northern region was ranked highest at 46.2%.

Access to markets for agricultural products is a primary constraint to increasing income and improving the livelihoods of most households in northern Uganda. The production of marketable surplus of staple food over what is needed for domestic consumption is initially the most common form of commercialisation in subsistence agriculture (World Bank, 2011).

It is against this background that SEATINI-Uganda conducted this study in the districts of Gulu and Lira to determine the satisfaction levels of the farmers in the northern region in relation to the market opportunities available to them. The study focused mainly on market opportunities for Sunflower, simsim, cassava and maize as such crops are on high demand both within the region and in the neighbouring countries like South Sudan, Ethiopia and Kenya.

The study will provide evidence to enable CSOs' advocacy for ensuring that the farmers in the northern region benefit from the available market opportunities and build their capacity to effectively utilise and benefit from available market opportunities.

1.2 Objectives of the study

The overall objective of the study was to measure the farmers' satisfaction with the available market opportunities for their agricultural products as well as access, reliability and the challenges they face.

3 MFPED (2012), Poverty Status Report: Poverty Reduction and the National Development Process

The specific objectives of the study were to:

- Establish available market opportunities for smallholder farmers in the northern region.
- Assess the level of smallholder farmers' satisfaction with the available market opportunities for their produce.
- Examine the major challenges faced by smallholder farmers in accessing the available market opportunities.
- Provide policy and other recommendations in ensuring that farmers are able to maximally access and benefit from available market opportunities.

1.3 Profile of Districts of Study

Gulu District

Gulu district is located in northern Uganda. It is bordered by Amuru and Nwoya district in the West and South West respectively, Lira district in the South East, Lamwo district in the North East, Pader district in the East, and Oyam district in the South. The total land area of Gulu district is 3,449.08 sq km. Gulu district is made up of 12 sub counties and 4 Divisions, 69 parishes and 342 villages. The district population is estimated to be 396,500 people (UBOS, 2012). Crop production is the major economic activity in Gulu, employing about 95% of the population. Some key socio-economic indicators are presented in *Table 1.1.*

Lira District

Lira District is located in Lango sub-region in Northern Uganda. It is bordered by the districts of Pader and Otuke in the North and North East, Alebtong in the East, Dokolo in the South and Apac in the West. The total land area of Lira district is 1326 sq km. Lira district is made up of 9 sub counties and 4 Divisions; 63 parishes and 20 wards; 678 villages and 64 cells. The district population is estimated to be 403,100 people (UBOS, 2012). The economy of the district is mainly based on agriculture, with 81% of the population engaged in subsistence farming. Other sectors in the economy include agro-processing industries (3.1%), commercial activities and banking (15.9%). Some key socio-economic indicators are presented in *Table 1.1.*

Table 1.1: Key Agricultural Indicators (2010)

Sector	Indicator		Gulu	Lira
Population	Male		195,885	196,108
	Female		200,615	206,992
Agriculture	Agricultural Households -CIS		29,802	59,000
	Total Production of major crops- UCA 2008/09 (Metric Tonnes)	Plantain Bananas	0	215
		Finger Millet	4,931	4,441
		Maize	10,386	17,156
		Sorghum	6,507	13,831
		Rice	1,997	8,009
		Sweet potatoes	61,732	10,871
		Irish Potatoes	0	53
		Cassava	28,933	13,821
	Number of Livestock -2008 Livestock Census	Cattle	40,130	159,533
		Goats	65,301	161,711
		Sheep	4,290	12,749
		Pigs	26,570	28,631
		Chicken	299.830	1,116,903
		Ducks	62,360	30,927
		Turkey	5,210	4,927

Source: *UBOS Statistical Abstract (2012), and Agricultural Census 2008/09; and Gulu and Lira DDPs*

1.4 Limitations of the study

- The building blocks of any user feedback study are ordinal in nature and are based on experiential responses, thus, there is likelihood of subjectivity in the responses.
- The questionnaire design did not allow analysis of the data according to the income level of the households. However, data has been analysed according to the gender of the households.

1.5 Structure of the Report

The report is divided into four sections. Section one deals with the background, section two, explains the methodology of the study including information on the respondent characteristics, Section three, is a presentation of the key findings and the final Section presents the conclusion and key policy recommendations.

Chapter 2: The Survey Methodology

The study used the Citizen Report Card (CRC) methodology which was developed by Public Affairs Foundation in Bangalore, India.[4] The methodology combines quantitative research methods and qualitative findings obtained from Focus Group Discussions (FGDs), and key informant interviews to enhance the overall validity of the quantitative findings. The issues that were investigated include:

- access to markets;
- reliability of markets;
- challenges of accessing markets; and
- overall satisfaction with the markets for agricultural produce.

2.1 Scope and Coverage

The study involved a sample survey of smallholder farmers, government officials, and private sector actors in Gulu and Lira districts as indicated in the *Table 2.1* below. The selection of the districts was purposive, based on the following criteria:

a. Lira district was selected because of the presence of more than 20 agro-based factories contracting and buying produce especially sunflower from farmers.

b. Gulu district was selected because of its proximity to Southern Sudan, a key market for agricultural produce from Northern Uganda.

2.2 Survey Instruments

A quantitative survey questionnaire was developed for use in collecting information on smallholder farmers, government officials and private / NGO actors. The draft questionnaires were field-tested in one sub county in each district (Pece division in Gulu and Adyel in Lira), before being finalised. Copies of the survey instruments are in *Annex 3*. All qualitative information was collected through Focus Group Discussions (FGDs).

2.3 Sample Design

The study collected data from a sample of sub-counties in the two districts. The design was chosen due to time and budget constraints which limits covering the entire population in the district.

The study conducted interviews of 666 respondents in the two districts as shown in *Table 2.1*. The sampling units were households, local government officials and private sector actors. The sub-counties were purposely selected; one close and another far from the district headquarters.

4 Information on how to apply the citizen report card approach can be found at: http://www.pacindia.org/publications/tool-kits/citizen-report-card-crc-too/

To ensure adequate representation of each sub-county based on the population, the study employed the Probability Proportion to Size (PPS) method[5] to derive each sub county sample. The households that were interviewed were selected from the households within the selected sub-county. Due to the absence of a complete listing of households, enumerators started at the sub-county headquarter, moved anti-clockwise (this was arbitrary, but every enumerator followed the same method), skipped two households (skip interval of 2 households[6]) after each interview, until the required number of households for that sub-county was reached. To ensure adequate representation, each parish in the sub-county was covered. One adult person (either a woman or man) per household was interviewed. Since the questions asked were about personal perceptions, the selected respondents were encouraged to give their true opinion.

The Focus Group Discussions (FGDs) were held with selected farmers in each sub county. On average, each FGD was attended by 20 people. The FGDs were conducted in local languages to ensure active involvement of all participants.

Table 2.1 Sample Distribution by District

District	Sub County	Number of Households	FGDs (# of people)	Gov't Officials	Private Sector	Total
Gulu	Bungatira	116	17			
	Odek	112	32			
	Sub-Total	228	49	11	46	334
Lira	Aromo	118	18			
	Barr	142	16			
	Sub-Total	260	34		38	332
TOTAL		488	83	11	84	666

Source: *Survey data*

2.4 Data Collection

Survey data was collected in the month of August 2013. The exercise was carried out by a team that was comprised of one Lead Researcher and Ten (10) Research Assistants. Mr. Daniel Lukwago was the Lead Researcher; provided the overall leadership and undertook quality control through the field research process. He designed the survey instruments, analysed the data, and wrote this study report.

2.5 Data Analysis

Completed questionnaires were cleaned and then entered into a customised data programme; CSPro, and later analysed using STATA software. The statistical analysis consisted of a step-by-step process, starting with frequencies, cross-tabulations and, finally, an exploratory analysis of the respondents' perceptions on market accesses. Data collected during FGDs was reviewed and case studies presented in the report too.

5 PPS is a sampling technique in which the probability of selecting a sampling unit (e.g. health center) is proportional to the size of its population. It gives a probability (i.e., representative) sample.
6 Using a skip interval brings more variety into the cluster, while still keeping it reasonably compact.

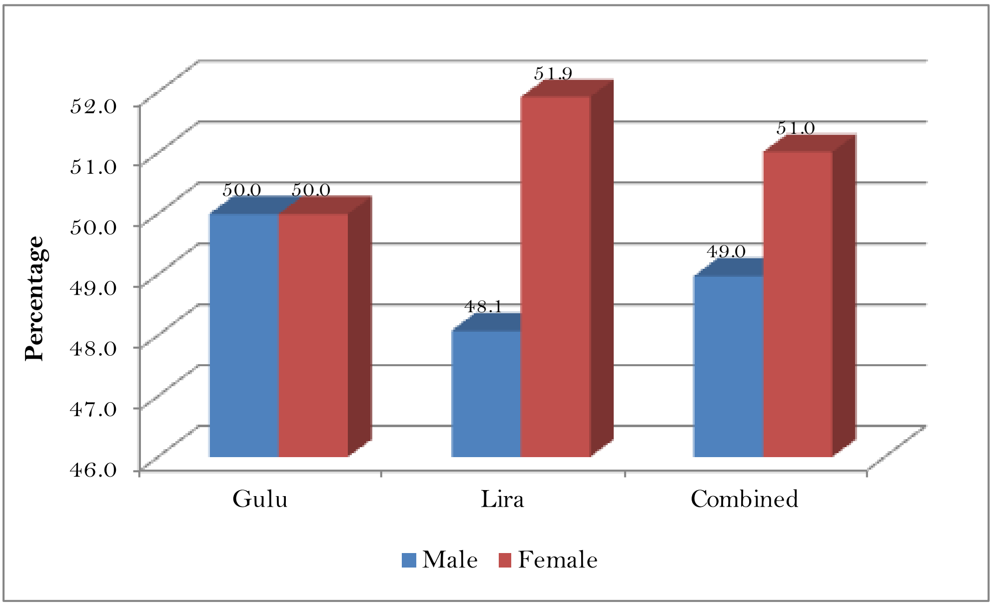
Chapter 3: Key Findings

3.1 Respondent Characteristics

a. Gender:

Overall, 51% of the households were females and 49% males. There was an equal number of males and females in Gulu, whereas in Lira 52% were females and 48% were males (Figure 3.1).

Figure 3.1: Gender of Households



Source: *Survey data*

b. Age:

The dominant age range is 18-42 years, overall 65% of the households were between 18-42 years of age, 19% between 43-54 years, and 16% were 55 years and above. The same characteristics are similar in the two districts and gender; (Table 3.1).

Table 3.1: Age distribution of households (%)

Age (in years)	Gulu			Lira			Combined		
	Male	Female	Total	Male	Female	Total	Male	Female	Total
18-30	31.6	42.1	36.8	25.0	29.9	27.5	28.2	35.5	31.9
31-42	36.8	24.6	30.7	33.1	38.1	35.7	34.9	31.9	33.3
43-54	21.9	21.1	21.5	17.7	14.9	16.3	19.8	17.7	18.7
55 and above	9.7	12.3	11.0	24.2	17.2	20.5	17.2	14.9	16.1
Total	100	100	100	100	100	100	100	100	100

Source: *Survey data*

c. Education:

Overall, half (52%) of the households had no or less than primary education, 29% had completed primary education, 8.4% had completed O-level and 4.1% A-level education. Lira had a highest percentage (60%) of the households with no or less than primary education compared to Gulu (43%). By gender, 68% of females compared to 35% of the male households had no or less than primary education (Table 3.2).

Table 3.2: Highest level of education of Households (%)

Level of Education	Gulu			Lira			Combined		
	Male	Female	Total	Male	Female	Total	Male	Female	Total
No formal education	3.5	22.3	12.8	7.2	37.0	22.7	5.4	30.4	18.1
Less than Primary	27.2	33.0	30.1	32.0	42.2	37.3	29.7	38.1	34.0
Completed Primary	36.8	25.9	31.4	36.0	17.8	26.5	36.4	21.5	28.8
Completed O-Level	14.0	8.0	11.1	10.4	2.2	6.2	12.1	4.9	8.4
Completed A-Level	7.9	6.3	7.1	3.2	0.0	1.5	5.4	2.8	4.1
Completed University	3.5	3.6	3.5	0.8	0.0	0.4	2.1	1.6	1.9
College / Vocational	6.1	0.9	3.5	4.0	0.7	2.3	5.0	0.8	2.9
Other	0.9		0.4	6.4		3.1	3.8		1.9
Total	100	100	100	100	100	100	100	100	100

Source: *Survey data*

d. Major source of income:

The major source of income of the households is shown in Table 3.3. Over three-quarters (75%) of the households derive their income from subsistence farming. Casual labour is also a common source of income. Gulu district had more households (79%) who derive their income from subsistence farming compared to Lira (72%). More female households (79%)

derive their income from subsistence farming than male households (72%).

Table 3.3: Major source of income of households (%)

Source	Gulu			Lira			Combined		
	Male	Female	Total	Male	Female	Total	Male	Female	Total
Subsistence farming	76.3	81.4	78.9	68.0	76.3	72.3	72.0	78.6	75.4
Commercial farming	3.5	0.0	1.8	8.8	0.7	4.6	6.3	0.4	3.3
Wage employment	7.0	6.2	6.6	2.4	0.7	1.5	4.6	3.2	3.9
Non-agricultural enterprises	3.5	3.5	3.5	2.4	3.7	3.1	2.9	3.6	3.3
Casual Labour	4.4	1.8	3.1	8.0	10.4	9.2	6.3	6.5	6.4
Property income		0.9	0.4		0.0	0.0			0.2
Transfers	0.9		0.4	0.0		0.0	0.4	0.4	0.2
Remittances	3.5	2.7	3.1	5.6	7.4	6.5	4.6	5.2	4.9
Other	0.9	3.5	2.2	4.8	0.7	2.7	2.9	2.0	2.5
Total	100	100	100	100	100	100	100	100	100

Source: *Survey Data*

e. Monthly Expenditure:

Households in Gulu had the highest monthly expenditure compared to those in Lira. On average, households in Gulu spend Shs 193,623 in a month compared to Shs 171,292 spent in Lira (Table 3.4). The variations in the monthly spending shows the variations in socio-economic conditions in the two districts.

Table 3.4: Monthly Expenditure of Households

District	Minimum	Maximum	Mean	Std. Dev.
Gulu	0	1,200,000	193,623	201,382
Lira	0	2,000,000	171,292	284,446
Overall	0	2,000,000	181,725	249,114

Source: *Survey data*

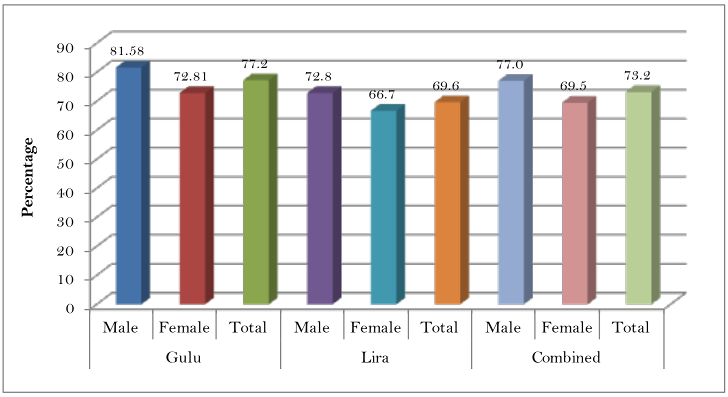
3.2 Access to Markets for Agricultural Produce

Recent studies have shown that improvements in market access increases agricultural productivity and efficiency (Sanjaya DeSilva, 2011). Rural farmers with better market access and more favourable agro-ecological conditions can more readily grow higher-value crops (Benin.S., et al, 2007).

a) Selling agricultural produce

Majority (73.2%) of the households interviewed reported to have sold any agricultural produce during the last one year. The percentage was higher in Gulu (77.2%), compared to Lira (69.6%). More male households (77.0%) compared to females (69.5%) sold any agricultural produce (*Figure 3.2*).

Figure 3.2: Households who had sold agricultural produce



Source: *Survey Data*

"We sell because there is no option, especially for sunflower and cotton, it's not openly sold on the market but to millers or companies"

FGD in Barr S/C, Lira district.

Overall; more than half (57.7%) of the farmers sold their produce in a market (mainly village[7] and assembly[8] markets). This was followed by those who sold their produce at home (50.4%) and stores/ warehouse (16.8%). A high proportion of farmers in Gulu (75.6%) sold their produce in markets compared to Lira (40.3%). A high proportion of female farmers (60.7%) than males (54.9%) sold their produce in markets (*Table 3.5a & 3.5b*).

Table 3.5a: Where farmers sold their agricultural produce (%)

Point of Sale	Gulu			Lira			Combined		
	Male	Female	Total	Male	Female	Total	Male	Female	Total
Home (after harvest)	53.8	49.4	51.7	55.0	43.3	49.2	54.4	46.2	50.4
Garden (before harvest)	1.1	1.2	1.1	0.0	0.0	0.0	0.5	0.6	0.6
Market	73.1	78.3	75.6	36.3	44.4	40.3	54.9	60.7	57.7
Store /warehouse	5.4	2.4	4.0	31.9	26.7	29.3	18.5	15.0	16.8
Other	0.0	0.0	0.0	0.0	1.1	0.6	0.0	0.6	0.3

N.B. Percentages add-up to more than 100% due to multiple responses

Source: *Survey Data*

7 Village markets function as outlets for local farmers, a retail market for local consumers and a bulking-up market for intermediary traders who tend to buy higher quality produce destined for district, urban or even export markets

8 Assembly markets are usually based in towns or villages located on trunk roads. They function as retail markets but they are also important as assembly points for lorry loads (10 to 15 tonnes) of produce to be transported to the main urban centres and, if it is of a heterogeneous and high enough quality, may be sold directly for export. Many assembly markets are open every day.

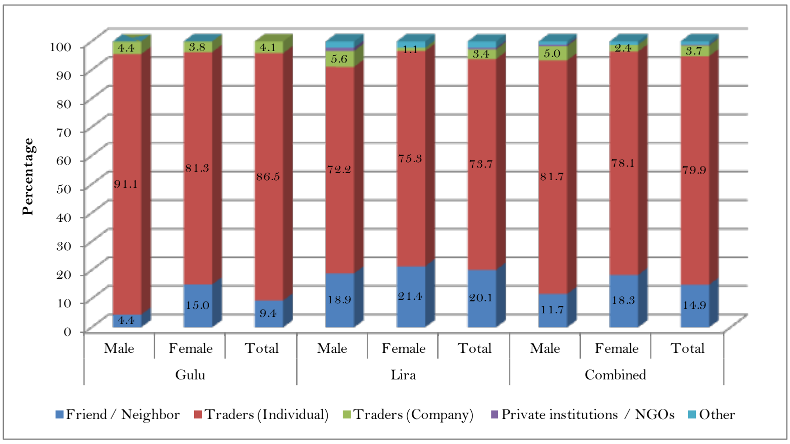
Table 3.5b: Type of market for the agricultural produce (%)

Type of Market	Gulu			Lira			Combined		
	Male	Female	Total	Male	Female	Total	Male	Female	Total
Village market	45.6	53.9	49.6	30.3	32.5	31.5	40.6	45.7	43.2
Assembly market	41.2	36.9	39.1	51.5	37.5	43.8	44.6	37.1	40.8
Wholesale market	5.9	4.6	5.3	3.0	2.5	2.7	5.0	3.8	4.4
Roadside retail market	7.4	4.6	6.0	15.2	27.5	21.9	9.9	13.3	11.7
Total	100	100	100	100	100	100	100	100	100

Source: *Survey Data*

Majority (79.9%) of the farmers sold their agricultural produce to individual traders. This was followed by friends/neighbours (14.9%). Gulu had a higher proportion (86.5%) of farmers who sold their produce to individual farmers compared to Lira (73.7%). A higher proportion (81.7%) of male farmers compared to females (78.1%) sold their produce to individual farmers (*Figure 3.3*).

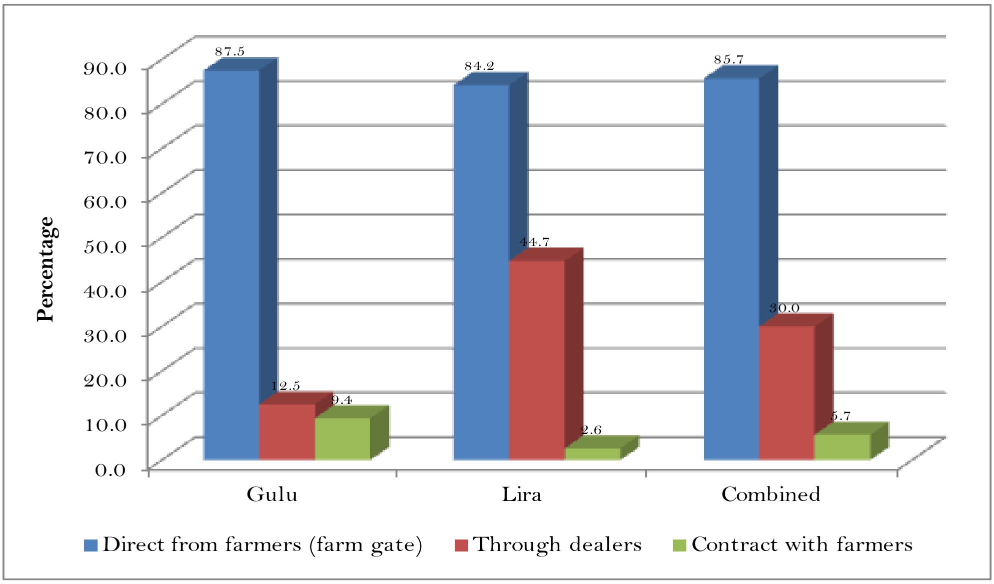
Figure 3.3: Whom the farmers sold their agricultural produce



Source: *Survey Data*

Majority (85.7%) of the private sector actors interviewed reported that they buy most of their agricultural produce directly from farmers. This corroborates well with the farmers who reported to sell their produce to individual traders.

Figure 3.4: Where private sector actors buy their agricultural produce

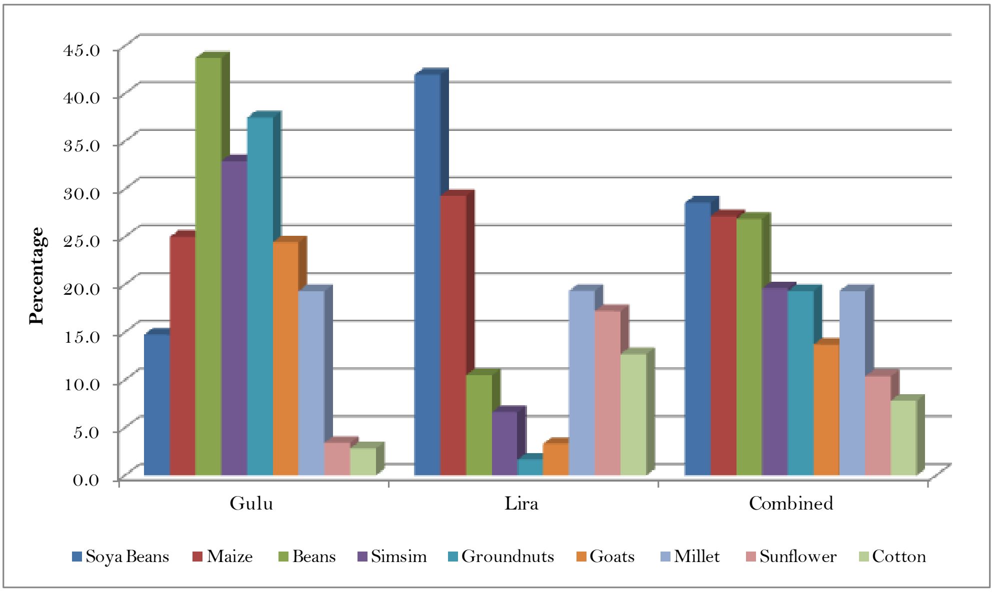


Source: *Survey Data*

The five most commonly sold agricultural produce were Soya Beans (28.6%), Maize (27.2%), Beans (26.9%), Simsim (19.6%), and Groundnuts (19.3%). In Gulu, the five most commonly sold agricultural produce by farmers include: Beans (43.8%), Groundnuts (37.5%), Simsim (33.0%), Maize (25.0%), and Goats (24.4%). Whereas in Lira, the five most commonly sold agricultural produce by farmers include: Soya Beans (42.0%), Maize (29.3%), Millet (19.3%), Sunflower (17.2%), and Cotton (12.7%). For male farmers, the five most commonly sold agricultural produce include: Maize (35.9%), Soya Beans (33.2%), Beans (27.7%), Simsim (19.0%), and Groundnuts (18.5%). However, for female farmers the five most commonly sold agricultural produce include: Millet (26.6%), Beans (26.0%), Soya Beans (23.7%), Groundnuts (20.2%) and Simsim (20.2%) [*Figure 3.5 and Annex 1]*

Some local government officials and private sector actors interviewed complained about the increasing number of traders from foreign countries (especially Southern Sudan) who are buying directly from smallholder farmers; who at times exploit them, don't worry about quality, and or cloud out the local traders; thus stiffing the local economy.

Figure 3.5: Most common agricultural produce sold by farmers



Source: *Survey Data*

b) Distance travelled to sell produce

Farmers that are closer to the consumer markets (i.e. have better market access) tend to sell more of their produce (World Bank, 2011). Majority (82.6%) of the farmers sold their produce within a distance of 5Kms. A higher proportion (90.6%) of farmers in Lira as compared to those in Gulu (74.4%), sold their produce within a distance of 5Kms. More (85.0%) female farmers compared to males (80.4%) sold their produce within a distance of 5Kms (*Figure 3.6*).

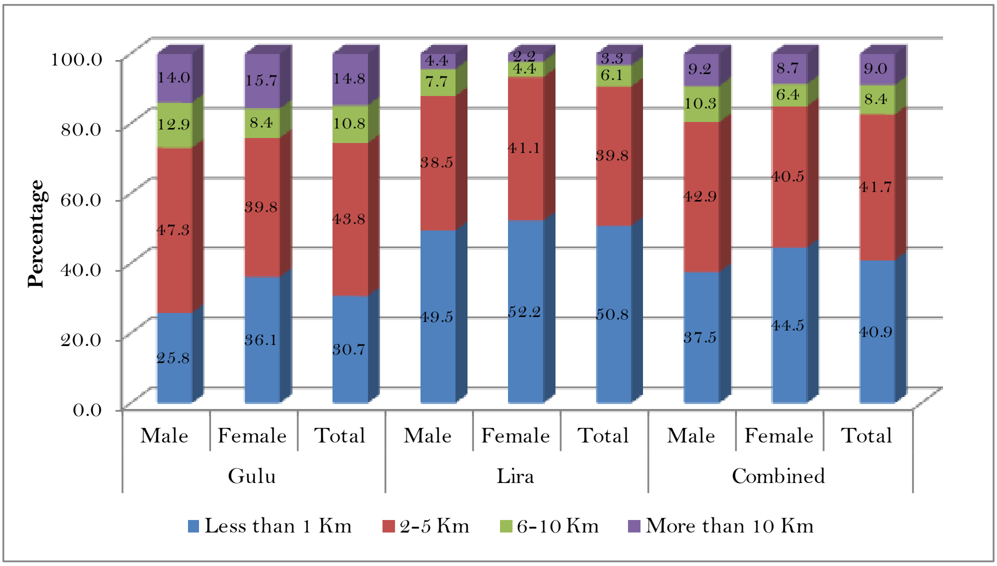
"There are some farmers who are in position to transport their produce to Lira town, but most of us cannot because it's too far and expensive."

FGD in Oromo S/C, Lira district

Consequently, 42.3% used bicycles and 32.2% used feet to transport their produce to the market. Only 7.3% used vehicles. The use of bicycle was higher in Lira (50.8%) compared to Gulu (33.5%). More females (42.8%) walked on foot compared to males (22.3%) to market their produce (*Table 3.6*).

These findings imply that access to markets may no longer be defined in terms of distance to points of sale, but rather in terms of the ability of the farmers to obtain and negotiate for a remunerative price.

Figure 3.6: Distance travelled by farmers to sell their agricultural produce



Source: *Survey Data*

Table 3.6: Means of transport used by farmers to sell their agricultural produce (%)

Means of Transport	Gulu			Lira			Combined		
	Male	Female	Total	Male	Female	Total	Male	Female	Total
Feet	17.2	39.8	27.8	27.5	45.6	36.5	22.3	42.8	32.2
Bicycle	38.7	27.7	33.5	56.0	45.6	50.8	47.3	37.0	42.3
Motorcycle	34.4	22.8	29.0	5.5	0.0	2.8	20.1	11.0	15.7
Vehicle	9.7	9.6	9.7	6.6	3.3	5.0	8.2	6.4	7.3
Others	0.0	0.0	0.0	4.4	5.6	5.0	2.2	2.9	2.5
Total	100	100	100	100	100	100	100	100	100

Source: *Survey Data*

c) Market Information

Access to markets for smallholder farmers is greatly influenced by availability of market information. Lack or asymmetry of information is thus considered to be one of the major constraints to smallholder farmers' access to markets (Okello. J.J, 2011). Up-to-date, or current market information enables farmers to negotiate with traders from a position of greater strength. It also enables spatial distribution of produce from rural areas to urban areas and between markets.

The survey results show that majority of the farmers get market information from individual traders (59.4%), family /friends or neighbours (51.5%), company traders (48.5%), radio / television (26.6%), own research / visiting markets (11.5%) among others. A higher proportion of farmers in Lira (58.0%) than Gulu (38.6%) get market information through traders (company). More male (29.9%) than female (23.1%) farmers get market information from radio/television (*Table 3.7*).

"We lack market information, so, we are sometimes not updated on the current market prices."

FGD in Aromo S/C, Lira district.

Table 3.7a: Main source of market information -farmers (%)

Main Source	Gulu			Lira			Combined		
	Male	Female	Total	Male	Female	Total	Male	Female	Total
Family /friends or neighbours	57.0	54.2	55.7	38.5	56.7	47.5	47.8	55.5	51.5
Traders (individual)	69.9	67.5	68.8	51.7	48.9	50.3	60.9	57.8	59.4
Traders (company)	44.1	32.5	38.6	58.2	57.8	58.0	51.1	45.7	48.5
Cooperative / SACCO	5.4	0.0	2.8	0.0	1.1	0.6	2.7	0.6	1.7
Radio / Television	33.3	25.3	29.6	26.4	21.1	23.8	29.9	23.1	26.6
Newspapers	3.2	3.6	3.4	1.1	0.0	0.6	2.2	1.7	2.0
LC Official	1.1	1.2	1.1	1.1	0.0	0.6	1.1	0.6	0.8
Billboards/ posters	1.1	1.2	1.1	0.0	0.0	0.0	0.5	0.6	0.6
Own research/ visiting markets	22.6	18.1	20.5	2.2	3.3	2.8	12.5	10.4	11.5
Other	0.0	0.0	0.0	5.5	2.2	3.9	2.7	1.2	2.0

N.B. Percentages add-up to more than 100% due to multiple responses
Source: *Survey Data*

Most private sector actors interviewed get market information from other traders (78.6%), family /friends or neighbours (62.9%), farmers (51.4%), radio / television (10.0%) [*Table 3.7b*]. Surprisingly, the use of radio and television is not a very common source of market information.

Table 3.7b: Main source of market information –Traders (%)

Main Source	Gulu	Lira	Combined
Family /friends or neighbours	68.8	57.9	62.9
Other Traders	93.8	65.8	78.6
Farmers	78.1	29.0	51.4
Cooperative / SACCO	3.1	5.3	4.3
Radio / Television	3.1	15.8	10.0
Newspapers	0.0	2.6	1.4
LC Official	0.0	2.6	1.4
Billboards / posters	3.1	2.6	2.9

N.B. Percentages add-up to more than 100% due to multiple responses
Source: *Survey Data*

d) Group Marketing

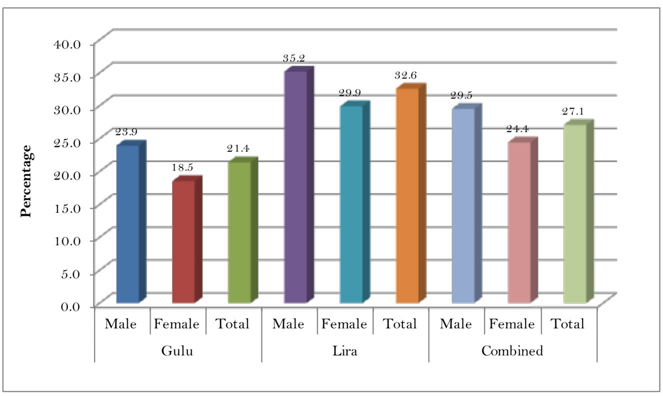
During the colonial period, Ugandan farmers were organised on a geographical basis into primary societies (based on individual parishes), district societies and regional societies. These structures remained in place until the early 1990s and were supported by a government ministry for Cooperatives. However, government liberalised the markets and many farmers' societies vanished or become dormant (Robbins, P., and Ferris, S., 1999).

Group marketing would be a successful strategy for farmers to follow if they wish to maximise their income. For collective marketing to be effective, farmers needs to be in groups. However, group formation has not been fully embraced by the farmers interviewed in the two districts. Only 27.1% of the farmers were members of a group. Lira had a higher percentage (32.6%) than Gulu (21.4%). More male farmers (29.5%) reported to be members of a group compared to female farmers (24.4%) [Figure 3.7].

"Farmers sell individually and each at a different price"

FGD in Barr S/C, Lira district.

Figure 3.7: Farmers who are members of any group



Source: *Survey Data*

"Farmer groups are not there (cooperatives have died) and farmers do not have voices to negotiate fair pricing"

FGD in Bungatira S/C. Gulu District.

Unfortunately, even those who reported to be members of a group, very few (16.8%) were engaged in group marketing. Gulu had a higher proportion of farmers (29.7%) engaged in collective marketing than Lira (8.6%). More female farmers (22.0%) were engaged in collective marketing compared to males (13.0%) [*Table 3.8*].

"Farmers do not have a strong voice and most of them are in dire need of money and cannot wait to bulk their produce and sell at a later time"

FGD in Bungatira S/C, Gulu District.

Table 3.8: Major activities of the group

Type of Activity	Gulu			Lira			Combined		
	Male	Female	Total	Male	Female	Total	Male	Female	Total
Production	68.2	46.7	59.5	87.5	88.5	87.9	79.6	73.2	76.8
Harvesting	45.5	46.7	46.0	18.8	11.5	15.5	29.6	24.4	27.4
Storage	9.1	6.7	8.1	3.1	0.0	1.7	5.6	2.4	4.2
Group Marketing	18.2	46.7	29.7	9.4	7.7	8.6	13.0	22.0	16.8
Saving and lending	81.8	60.0	73.0	62.5	61.5	62.1	70.4	61.0	66.3
Self Help	45.5	60.0	51.4	12.5	0.0	6.9	25.9	22.0	24.2
Others	9.1	6.7	8.1	12.5	0.0	6.9	11.1	2.4	7.4

N.B. Percentages add-up to more than 100% due to multiple responses

Source: *Survey Data*

3.3 Reliability of agricultural markets

a) Contract farming

Contract farming is one way of ensuring a reliable market for the farmer's produce. Contract farming enables smallholder farmers to commercialise their farming operations through the creation of market linkages. Numerous studies involving various agricultural commodities have shown that smallholder farmers have variably benefited from contract farming through the access of production inputs, output markets, market development, rural development, and other intangible benefits (Elepu, G., and Nalukenge,I., 2009).

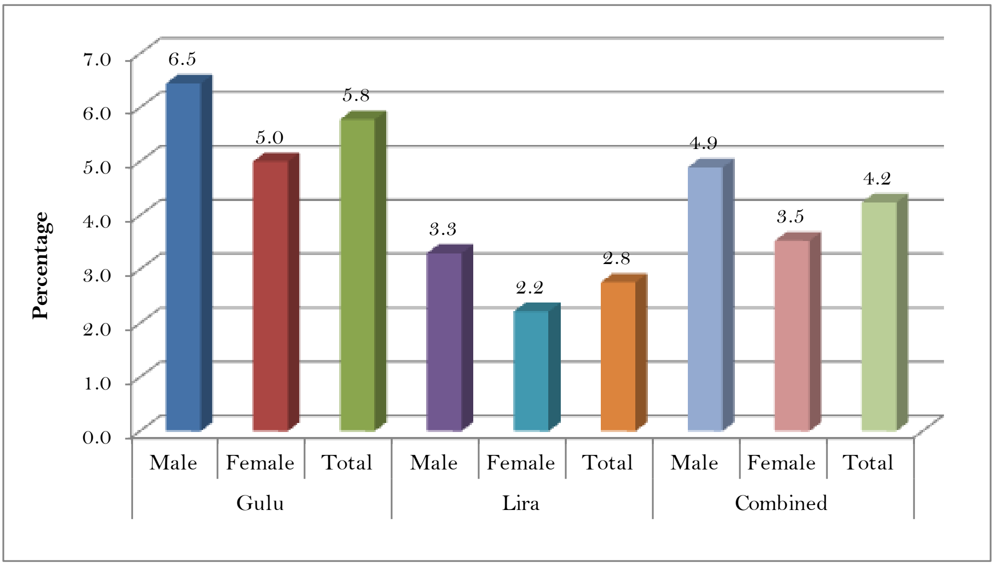
Despite the benefits accruing to smallholder farmers from engaging in contract farming, very few farmers in the study district are engaged in contract farming. Only 4.2% of the farmers interviewed were engaged in contract farming. Gulu district reported the highest percentage of 5.8% however, Lira reported 2.8%. Male farmers reported a higher percentage (4.9%) compared to females (3.5%) [*Figure 3.8*]. Most farmers are engaged in contract farming of Sunflower, maize, Beans, and G/Nuts.

"Our quality of produce some times does not meet the required standard because of poor storage and post harvest handling"

FGD in Barr S/C, Lira district.

During FGDs, some farmers complained about the failure of some buyers to honour their contracts as a deterring factor for not embracing contract farming. However, the companies too accused some farmers for not honouring contracts. Other factors that hinder contract farming include: low literacy levels among farmers; low production levels and ignorance among farmers. The weak legal framework on enforcement of contracts also makes contract farming untenable.

Figure 3.8: Farmers engaged in contract farming



Source: Survey Data

b) Rating of market access of agricultural produce

Farmers were asked about their rating of access to markets during the last one year of a few selected agricultural produce; Beans, Cassava, G/Nuts, Maize, Millet, Rice, Simsim, Soya beans, and Sunflower. The results are presented in *Tables 3.9a-c*. Overall, they reported an improvement in the market for rice and Simsim and lowest improvement in the market of maize and sunflower. Generally, Gulu farmers reported a higher improvement in the market of the above mentioned agricultural produce compared to Lira. This can be attributed to the proximity of the district to South Sudan with higher demand for agricultural produce.

Table 3.9a: Farmers' rating of market access of agricultural produce-Combined

Rating	Beans	Cassava	G/Nuts	Maize	Millet	Rice	Simsim	Soya Beans	Sunflower
Improved	35.0	36.1	43.4	17.3	27.6	59.7	60.0	30.4	24.2
Same	41.7	37.5	39.6	57.3	54.0	26.9	31.6	24.4	27.3
Worsened	23.3	26.4	17.0	25.5	18.4	13.4	8.4	45.2	48.5
Total	100	100	100	100	100	100	100	100	100

Source: *Survey Data*

Table 3.9b: Farmers' rating of market access of agricultural produce-Gulu

Rating	Beans	Cassava	G/Nuts	Maize	Millet	Rice	Simsim	Soya Beans	Sunflower
Improved	44.3	40.5	46.9	22.7	16.1	88.6	68.5	56.0	44.4
Same	36.7	51.4	40.7	70.5	77.4	11.4	29.6	36.0	22.2
Worsened	19.0	8.1	12.4	6.8	6.5	0.0	1.9	8.0	33.3
Total	100	100	100	100	100	100	100	100	100

Source: *Survey Data*

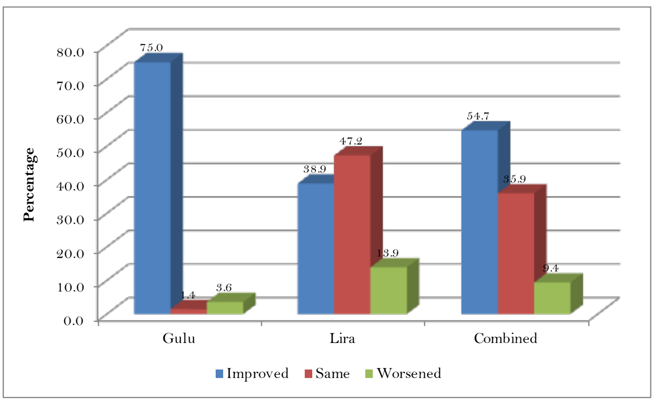
Table 3.9c: Farmers' rating of market access of agricultural produce-Lira

Rating	Beans	Cassava	G/Nuts	Maize	Millet	Rice	Simsim	Soya Beans	Sunflower
Improved	17.1	31.4	32.0	13.6	35.6	28.1	48.8	23.3	21.1
Same	51.2	22.9	36.0	48.5	37.8	43.8	34.2	21.1	28.1
Worsened	31.7	45.7	32.0	37.9	26.7	28.1	17.1	55.6	50.9
Total	100	100	100	100	100	100	100	100	100

Source: *Survey Data*

As shown in Figure 3.9, overall, more than half (54.7%) of the private sector actors interviewed believe that there has been some improvement in market access over the last one year. Gulu reported the highest (75%) and Lira the lowest (38.9%) proportion of private sector actors who believe there has been some improvement in market access.

Figure 3.9: Private Sector actors' rating of market access of agricultural produce



Source: *Survey Data*

"The market is there. However, the problem is the buyers. For example, Mukwano sets a price for sunflower at the time of planting, only to reduce it at harvest, and as farmers, we do not have a choice but to sell."

FGD in Barr S/C, Lira district.

3.4 Key Constraints to access to markets of agricultural produce

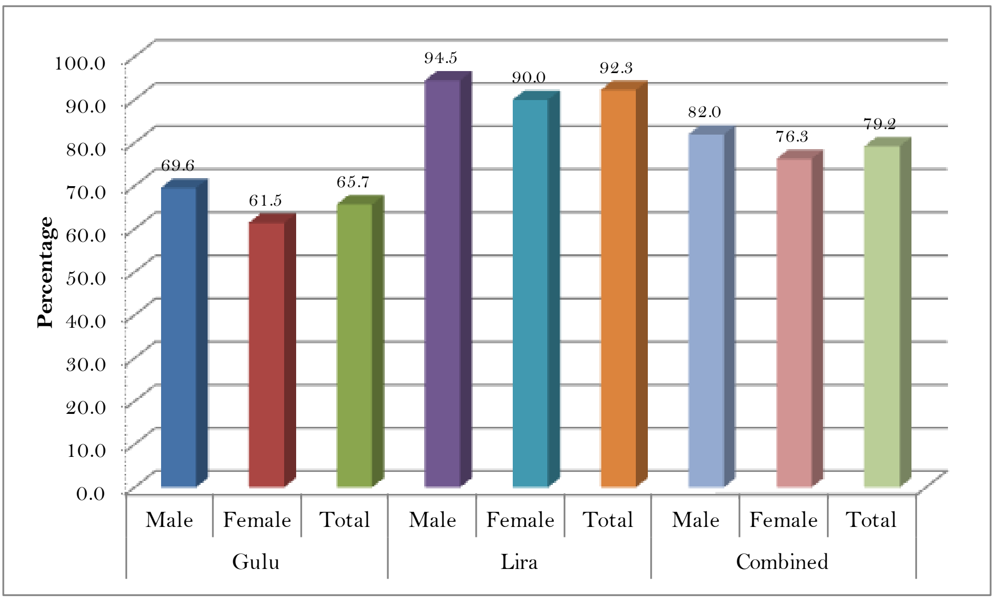
a) Exploitation by buyers of agricultural produce

The relationship between the farmers and the buyers seems to be shaky; with most farmers reporting that they are exploited by the buyers of their produce. Overall, 79.2% of the farmers reported that they are exploited. The proportion of farmers who reported to having been exploited was higher in Lira (92.3%) and lowest in Gulu (65.7%). A higher proportion of male farmers (82.0%) reported to have been exploited, than females (76.3%) [Figure 3.10].

"Prices are being determined by the buyers rather than the farmers themselves and its worse with cash crops like cotton, tobacco, and even sim sim"

FGD in Bungatira S/C, Gulu District.

Figure 3.10: Farmers who believe they have been exploited



Source: *Survey Data*

"The middle men have signed contracts with the companies yet a farmer has no contract. So, we have no right or demand for better prices"

FGD in Barr S/C, Lira district.

Most farmers (90.2%) reported that they are exploited by individual traders. This is followed by friends / neighbours (30.8%), companies (21.7%). Similar patterns were reported in both districts and gender (*Table 3.10*).

Table 3.10: Buyers who Farmers believe exploit them most

Type of Buyer/s	Gulu			Lira			Combined		
	Male	Female	Total	Male	Female	Total	Male	Female	Total
Friend /Neighbour	23.0	20.0	21.6	34.1	40.0	37.0	29.5	32.3	30.8
Traders (Individual)	93.4	92.0	92.8	92.9	83.8	88.5	93.2	86.9	90.2
Traders (Company)	18.0	18.0	18.0	23.5	25.0	24.2	21.2	22.3	21.7
Cooperatives	3.3	0.0	1.8	0.0	2.5	1.2	1.4	1.5	1.5
Gov't institutions (i.e. sch., hosp. etc)	3.3	0.0	1.8	3.5	1.3	2.4	3.4	0.8	2.2
Private institutions / NGOs	0.0	0.0	0.0	2.4	1.3	1.8	1.4	0.8	1.1
Other	4.9	2.0	3.6	4.7	0.0	2.4	4.8	0.8	2.9

N.B. Percentages add-up to more than 100% due to multiple responses

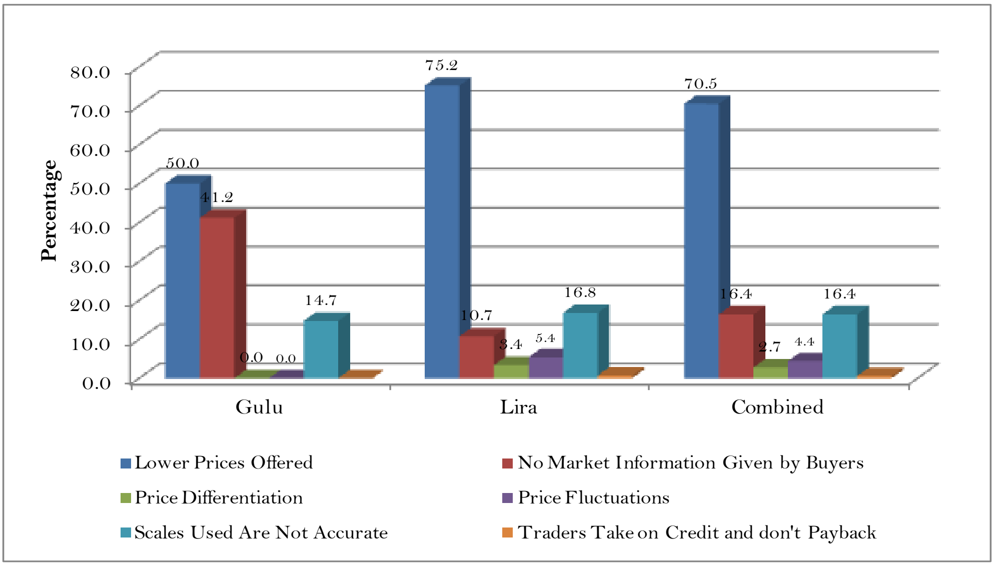
Source: *Survey Data*

"Our local markets are not reliable, that's why the middle men come to us at home,' and cheat us because we are selling individually and each household has its own needs or emergencies."

FGD in Barr S/C, Lira district.

Most farmers reported that they are exploited through lower prices (70.5%), minimal information is provided by the buyers (16.4%), and inaccurate weighing scales (16.4%) are employed. Lira has the highest proportion of farmers who reported lower prices offered (75.2%). Whereas Gulu has the highest proportion of farmers who reported minimal information provided by the buyers (41.2%) [*Figure 3.11*].

Figure 3.11: Ways through which farmers believe they are exploited



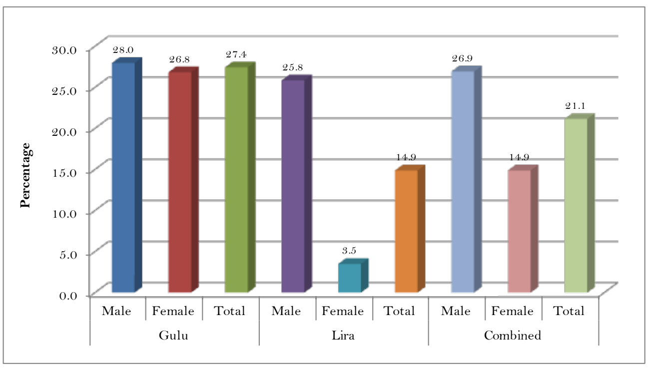
Source: *Survey Data*

b) Inadequate organisations /companies helping farmers to access markets

Overall, very few farmers (only 21.1%) are aware of the organisation /company helping farmers to access markets. The lowest level of awareness was reported in Lira (14.9%), and the highest in Gulu (27.4%). Male farmers are more aware (26.9%) compared to female farmers (14.9%) [*Figure 3.12*]. Some of the companies mentioned included: Sasakawa, Techno serve, Nile breweries, Mukwano, Victoria Seeds, Acted, Mount Mero, Plan Uganda, Euroafrique, World Vision, FAO, FAPAD, Action Hunger, and Germany Agro, among others.

In addition, majority (90%) of the local government officials interviewed reported a lack of awareness of any organisation/company helping farmers to access markets.

Figure 3.12: Farmers awareness of organisations helping farmers to access markets



Source: Survey Data

c) Minimal Government support in helping farmers to access markets

With the private sector led growth model, government focus is mainly on creating an enabling environment for the private sector to thrive. Thus, most government programmes have focused on building the required infrastructure such as roads, markets etc, rather than providing direct support to farmers to access markets. Most respondents were aware of government programmes such as Agricultural Livelihoods Recovery Programme (ALREP)9, National Agricultural Advisory Services (NAADS), and Peace Recovery and Development Plan (PRDP), among others. Most farmers interviewed, think such programmes are not helping them to access markets. They believe that the government has left them to the realms of the private sector.

"lack of proper coordination between the government and private investors hence the local farmers end up being the victims of low pricing"

FGD in Odek S/C, Gulu District.

d) Other constraints

Farmers revealed other constraints they face in marketing their agricultural produce. These rated in order of importance: Low prices offered (84.3%); Lack of market information (37.6%); High transport costs (35.7%); Long distances to the markets (30.1%); High market dues (23.3%); Poor storage facilities (21.6%); High labour costs (14.6%); and Poor communication (i.e. telephone network) (12.4%) [*Table 3.11*]

"The issue of low prices for our produce is disturbing, we do not benefit from farming more or less and this means a loss".

FGD in Oromo S/C, Lira district.

9 ALREP aims to stimulate the Northern Ugandan agricultural sector as a means for increasing the prosperity of its conflict-affected population, as well as contribute to the economic growth of the region and Uganda.

In Gulu, the farmers rated these constraints as follows: Low prices offered (81.1%); High transport costs (56.6%); Lack of market information (54.3%); Long distances to the markets (45.1%); High market dues (36.6%); High Labour costs (18.3%); Poor storage facilities (16.6%); and Poor communication (i.e. telephone network) (14.9%).

In Lira, the farmers rated these constraints as follows: Low prices offered (87.3%); Poor storage facilities (26.5%); Lack of market information (21.6%); High transport costs (15.5%); Long distances to the markets (15.5%); High Labour costs (11.1%); High market dues (10.5%); and Poor communication (i.e. telephone network) (9.9%).

"This market access is just political, government taxes the investor, bearing in mind that the investor will recover or fill the gap by squeezing the farmer with low prices"

FGD in Oromo S/C, Lira district.

Table 3.11: Key constraints/challenges faced by farmers (%)

Constraint	Gulu			Lira			Combined		
	Male	Female	Total	Male	Female	Total	Male	Female	Total
Low prices offered	82.6	79.5	81.1	89.0	85.6	87.3	85.8	82.7	84.3
Lack of market information	54.4	54.2	54.3	18.7	24.4	21.6	36.6	38.7	37.6
High transport costs	64.1	48.2	56.6	22.0	8.9	15.5	43.2	27.8	35.7
Long distances to the markets	52.2	37.4	45.1	20.9	10.0	15.5	36.6	23.1	30.1
High market dues	30.4	43.4	36.6	11.0	10.0	10.5	20.8	26.0	23.3
Poor storage facilities	17.4	15.7	16.6	28.6	24.4	26.5	23.0	20.2	21.6
High Labour costs	21.7	14.5	18.3	9.9	12.2	11.1	15.9	13.3	14.6
Poor communication (i.e. telephone network)	13.0	16.9	14.9	7.7	12.2	9.9	10.4	14.5	12.4

N.B. Percentages add-up to more than 100% due to multiple responses
Source: *Survey Data*

3.5 Satisfaction with access to markets

Satisfaction reflects the overall assessment of a service by the user, based on his/her experience. In this assessment, the person implicitly brings in his/her expectations or standards that in turn may also be influenced by the past experience of others in the community, one's educational level and awareness. Irrespective of how a person arrives at his/her assessment of satisfaction, it is an internal assessment on which he/she may act. Admittedly, satisfaction reflects personal judgments of users and can be measured only through the information provided by them (ADB & ADBI, 2007[10]).

10 Asian Development Bank (ADB) and Asian Development Bank Institute (ADBI) (2007), Improving Local Governance and Pro-Poor Service Delivery: Citizen Report Card Learning Toolkit.

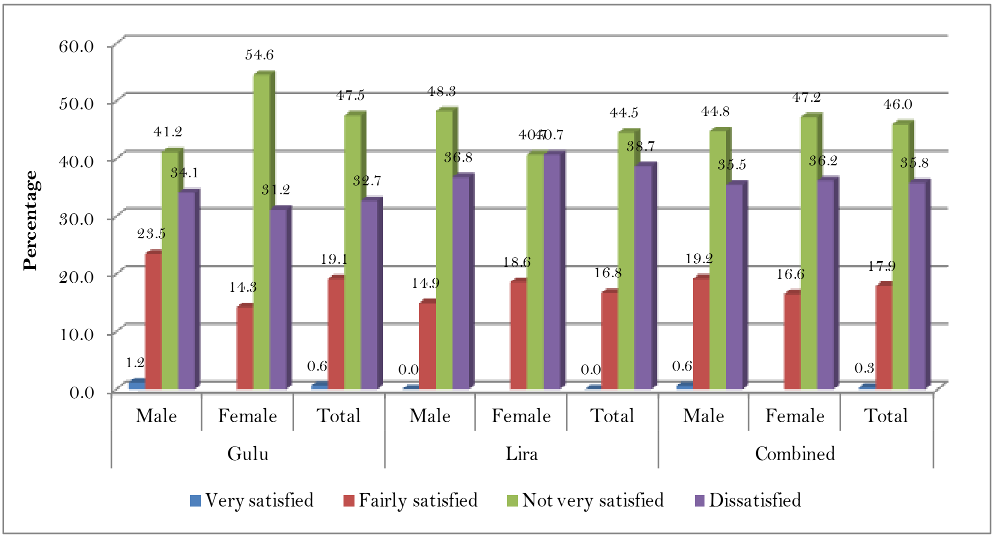
3.4.1 Overall satisfaction

Farmers were asked if they were satisfied with the overall access to markets of their agricultural produce. They were provided with five options: very satisfied, fairly satisfied, not very satisfied, and dissatisfied. Their satisfaction ratings are presented in *Figure 3.13.* Nearly half (46%) of the farmers were not very satisfied, 35.8% were dissatisfied. Only 0.3% and 17.9% were very satisfied and fairly satisfied, respectively.

In Gulu, 47.5% of the farmers were not very satisfied, 32.7% were dissatisfied. Only 0.6% and 19.1% were very satisfied and fairly satisfied, respectively. Whereas in Lira, 44.5% of the farmers were not very satisfied, 38.7% were dissatisfied and 16.8% were fairly satisfied.

By gender, 44.8% of the male farmers were not very satisfied, 35.5% were dissatisfied. Only 0.6% and 19.2% were very satisfied and fairly satisfied, respectively. On the other hand, 47.1% of the female farmers were not very satisfied, 36.2% were dissatisfied and 16.6% fairly satisfied.

Figure 3.13: Farmers overall Satisfaction with access to markets of their agricultural produce



Source: Survey data

In addition to the overall satisfaction, farmers were asked about their satisfaction with seventeen (17) different indicators. These included: Market for cassava; Market for simsim; Market for sunflower; Market for maize; Market for Beans; Market for Sorghum; Market for Millet; Market for Rice; Market information (i.e. on prices); Behaviour of traders (individual); Behaviour of traders (companies); Prices of produce; Access to markets of produce (i.e. roads, tel. etc); Quality of market places (i.e. facilities); Private sector / NGO assistance; and Government assistance (see details in Annex 2).

Overall, 29.8% of the farmers were satisfied with the market for Simsim; 41.7% were fairly satisfied with the market for rice; 44.9% were not very satisfied with the market information, especially on the prices; and 74.5% were dissatisfied with the support provided by government towards agricultural marketing (*Table 3.12*).

Table 3.12: Farmers' rating of satisfaction indicators -Combined (%)

Indicator/s	Very satisfied	Fairly satisfied	Not very satisfied	Dissatisfied	Total
Market for Beans	7.9	30.5	32.2	29.4	100
Market for Cassava	7.6	32.6	28.8	31.1	100
Market for Maize	2.1	32.1	30.5	35.3	100
Market for Millet	4.0	34.9	33.3	27.8	100
Market for Rice	12.1	41.7	17.4	28.8	100
Market for Simsim	29.8	33.5	19.6	17.1	100
Market for Sunflower	2.9	14.3	37.1	45.7	100
Market information (i.e. on prices)	2.0	8.8	44.9	44.3	100
Behaviour of traders (individual)	5.0	7.6	38.6	48.8	100
Behaviour of traders (companies)		6.8	32.2	61.0	100
General Prices of produce	0.7	6.5	35.6	57.3	100
Access to markets (i.e. roads, tel. etc)	3.2	11.5	34.3	51.0	100
Quality of market places (i.e. facilities)	3.0	7.8	27.7	61.5	100
Private sector / NGO assistance	4.0	17.0	18.0	61.0	100
Government assistance	1.0	4.8	19.7	74.5	100

Source: *Survey data*

In Gulu, 61.7% of the farmers were satisfied with the market for Beans; 79.0% were fairly satisfied with the market for Cassava; 56.3% were not very satisfied with the market information, especially on the prices; and 88.7% were dissatisfied with the general prices of agricultural produce (*Table 3.13*).

Table 3.13: Farmers' rating of satisfaction indicators - Gulu (%)

Indicator/s	Very satisfied	Fairly satisfied	Not very satisfied	Dissatisfied	Total
Market for Beans	61.7	31.7	3.3	3.3	100
Market for Cassava	15.8	79.0	2.6	2.6	100
Market for Maize	14.5	51.3	21.1	13.2	100
Market for Millet	10.5	63.2	15.8	10.5	100
Market for Rice	9.4	68.8	15.6	6.3	100
Market for Simsim	5.7	73.6	15.1	5.7	100
Market for Sunflower	1.8	5.3	44.4	48.5	100
Market information (i.e. on prices)	1.2	8.1	56.3	34.5	100
Behaviour of traders (individual)	0.6	0.6	36.1	62.7	100
Behaviour of traders (companies)	0.6	8.3	47.3	43.8	100
General Prices of produce	0.0	1.4	9.9	88.7	100
Access to markets (i.e. roads, tel. etc)	0.0	12.1	15.5	72.4	100

Quality of market places (i.e. facilities)	0.0	6.9	44.6	48.5	100
Private sector / NGO assistance	0.0	42.9	14.3	2.9	60
Government assistance		6.1	40.8	53.1	100

Source: Survey data

In Lira, 10.6% of the farmers were satisfied with the market for Beans; 34.7% were fairly satisfied with the market for Cassava; 40.6% were not very satisfied with the behaviour of individual traders; and 66.2% were dissatisfied with the access to markets of their produce, especially roads (*Table 3.14*).

Table 3.14: Farmers' rating of satisfaction indicators -Lira (%)

Indicator/s	Very satisfied	Fairly satisfied	Not very satisfied	Dissatisfied	Total
Market for Beans	10.6	26.6	23.4	39.4	100
Market for Cassava	10.2	34.7	29.6	25.5	100
Market for Maize	8.1	9.8	33.0	49.1	100
Market for Millet	6.4	20.2	34.0	39.4	100
Market for Rice	5.6	19.0	19.0	56.3	100
Market for Simsim	5.6	14.6	21.9	57.9	100
Market for Sunflower	5.4	15.1	19.3	60.2	100
Market information (i.e. on prices)	3.1	12.2	38.8	45.9	100
Behaviour of traders (individual)	3.0	14.9	40.6	41.6	100
Behaviour of traders (companies)	3.0	9.5	33.1	54.4	100
General Prices of produce	2.1	23.4	39.4	35.1	100
Access to markets (i.e. roads, tel. etc)	1.5	6.6	24.8	67.2	100
Quality of market places (i.e. facilities)	1.1	6.2	29.1	63.7	100
Private sector / NGO assistance	0.8	15.7	36.6	47.0	100
Government assistance		7.0	28.9	64.1	100

Source: Survey data

By gender, 27.0% of the male farmers were satisfied with the market for Simsim; 46.0% were fairly satisfied with the market for rice; 40.0% were not very satisfied with the market information, especially on the prices; and 73.6% were dissatisfied with the support provided by government towards agricultural marketing (*Table 3.15*).

Table 3.15: Farmers' rating of satisfaction indicators- Males (%)

Indicator/s	Very satisfied	Fairly satisfied	Not very satisfied	Dissatisfied	Total
Market for Simsim	27.0	37.8	21.6	13.5	100
Market for Rice	12.7	46.0	15.9	25.4	100
Market for Beans	8.0	28.4	34.1	29.6	100
Behaviour of traders (individual)	6.8	6.2	39.6	47.5	100

Private sector / NGO assistance	5.6	19.6	16.8	57.9	100
Market for Cassava	4.7	31.3	29.7	34.4	100
Access to markets (i.e. roads, tel. etc)	4.5	10.6	31.8	53.1	100
Market for Millet	3.9	26.9	36.5	32.7	100
Market for Maize	3.7	33.9	31.2	31.2	100
Quality of market places (i.e. facilities)	3.0	5.9	26.6	64.5	100
Market information (i.e. on prices)	2.3	5.7	46.0	46.0	100
Government assistance	1.9	5.7	18.9	73.6	100
General Prices of produce	0.6	6.2	36.0	57.1	100
Market for Sunflower		13.7	33.3	52.9	100
Behaviour of traders (companies)		3.8	40.0	56.3	100

Source: Survey data

On the other hand, 32.1% of the female farmers were satisfied with the market for Simsim; 40.5% were fairly satisfied with the market for millet; 43.7% were not very satisfied with the market information, especially on the prices; and 75.5% were dissatisfied with the support provided by government towards agricultural marketing (*Table 3.16*).

Table 3.16: Farmers' rating of satisfaction indicators – Females (%)

Indicator/s	Very satisfied	Fairly satisfied	Not very satisfied	Dissatisfied	Total
Market for Simsim	32.1	29.8	17.9	20.2	100
Market for Rice	11.6	37.7	18.8	31.9	100
Market for Cassava	10.3	33.8	27.9	27.9	100
Market for Beans	7.9	32.6	30.3	29.2	100
Market for Sunflower	5.6	14.8	40.7	38.9	100
Market for Millet	4.1	40.5	31.1	24.3	100
Quality of market places (i.e. facilities)	3.1	9.8	28.8	58.3	100
Behaviour of traders (individual)	3.0	9.1	37.6	50.3	100
Private sector / NGO assistance	2.2	14.0	19.4	64.5	100
Market information (i.e. on prices)	1.8	12.0	43.7	42.5	100
Access to markets (i.e. roads, tel. etc)	1.8	12.5	36.9	48.8	100
General Prices of produce	0.7	6.8	35.1	57.4	100
Market for Maize		29.5	29.5	41.0	100
Behaviour of traders (companies)		9.3	25.8	65.0	100
Government assistance		3.9	20.6	75.5	100

Source: *Survey data*

3.4.2 Reasons for Dissatisfaction

The main reasons for dissatisfaction reported by the farmers are presented in *Table 3.17*. Overall; lower prices, bad roads, high market dues, lack of market information, price fluctuations, and high transport costs featured prominently among the farmers. Lack of government support and use of inaccurate weighing scales by buyers were also among the reasons for dissatisfaction. Similar patterns were reported in the two districts and across gender.

"Imagine something painful; someone tightening his/her weighing scale and you may have expected some good kilograms, but you end up being cheated with a small margin"

FGD in Odek S/C, Gulu District.

Broken bridge in Odek S/C, Gulu District

"access to markets is a big problem since farmers have a poor road net work around the district to where they can sell their produce"

FGD in Bungatira S/C, Gulu District

Table 3.17: Reasons for Dissatisfaction by Farmers (%)

Reasons	Gulu	Lira	Males	Females	Combined
Lower Prices Offered	30.3	43.4	37.5	37.3	37.4
Bad Roads	21.4	10.0	16.7	13.5	15.2
High Market Dues	5.9	10.7	7.6	9.4	8.5
No Market Information	12.2	3.9	8.0	7.4	7.7
Price Fluctuations	8.4	6.8	7.3	7.8	7.5
High Transport Costs	6.7	4.6	4.4	7.0	5.6
No Market For Produce	1.7	7.1	5.1	4.1	4.6
Lack of Gov't Support	4.2	3.6	4.4	3.3	3.9

Inaccurate Weighing Scales	1.7	5.0	4.7	2.0	3.5
Long Distances To Markets	2.1	2.1	1.1	3.3	2.1
No Proper Market Facilities	2.9	0.4	1.5	1.6	1.5
Poor Storage Facilities	2.5	0.4	0.7	2.0	1.3
Price Differentiations	0.0	1.4	0.7	0.8	0.8
Lack of Market Facilities	0.0	0.4	0.4	0.0	0.2
Unscrupulous Buyers	0.0	0.4	0.0	0.4	0.2
Total	100.0	100.0	100.0	100.0	100.0

Source: *Survey data*

Proposals for improvement reported by the farmers are presented in *Table 3.18*. The most commonly reported ones included: government introducing price controls, improving on the transport network, better market access, farmers forming cooperatives i.e. SACCOS, government building storage facilities and reduction of market dues.

"our market (Odek market) is under a tree with no proper protective gears, no toilet and yet the government is generating revenues (market dues) from the traders"

FGD in Odek S/C, Gulu District.

Table 3.18: Proposed suggestions for improvement reported by Farmers (%)

Reasons	Gulu	Lira	Males	Females	Combined
Gov't should introduce price controls	23.0	31.3	28.3	26.6	27.5
Improve on transport network	25.4	12.1	19.9	15.9	18.1
Better market access	7.7	23.0	12.7	20.1	16.1
Farmer should form cooperatives i.e. SACCOS	14.4	3.9	8.8	8.4	8.6
Gov't should build storage facilities /ware houses	2.9	9.4	8.0	4.7	6.5
Reduce market dues	3.3	7.8	6.4	5.1	5.8
Provision of Mkt information esp. on prices	8.1	3.5	6.0	5.1	5.6
Build modern markets	3.3	2.3	2.4	3.3	2.8
Access to credit facilities	1.4	3.5	2.0	3.3	2.6
Large scale production	3.3	0.0	1.6	1.4	1.5
Scales be standardised	1.4	1.2	0.4	2.3	1.3
Improve the quality of produce	2.4	0.0	1.6	0.5	1.1
Gov't needs to protect the farmers	1.9	0.0	0.8	0.9	0.9
Gov't support in marketing of agric produce	0.5	1.2	0.8	0.9	0.9
Gov't should not tender its markets	0.5	0.4	0.4	0.5	0.4
Contract Farming	0.5	0.0	0.0	0.5	0.2
Encourage value addition	0.0	0.4	0.0	0.5	0.2
Total	100	100	100	100	100

Source: Survey data

Chapter 4: Conclusions and Recommendations

4.1 Conclusion

This study was conducted in Gulu and Lira to measure smallholder farmers' perceptions of access to markets of their agricultural produce. The study found that access to markets is a big challenge to most smallholder farmers mainly due to lack of market information, poor infrastructure (such as roads and market places), exploitation by traders (buyers) and minimal support from government and the private sector.

An overwhelming majority of the farmers are dissatisfied with the overall access to markets of their agricultural produce. The very low level of satisfaction with market access is a critical issue of concern for policy makers, since access to markets has a bearing on improving livelihoods of most smallholder farmers in Uganda.

4.2 Recommendations

Based on the findings, the following recommendations are generated for action by different stakeholders, such as government and non-governmental organisations in order to improve agricultural marketing:

a) Government

- *Increase support to farmers' cooperatives:* The government to encourage and support the formation of farmer groups and cooperatives as an important strategy for improving agricultural marketing. Government needs to support the formation of Village Savings and Lending Associations (VSLAs) and establish a regulatory framework for the VSLAs.
- *Improve road network and other communication systems:* Increased investment in district, and community access road construction and maintenance in order to increase accessibility of farmers to marketing centres all year round. Government needs to increase funding towards maintenance of district and community access roads.
- *Increased investment in storage facilities and sensitisation on the Ware House Receipt system*: Government needs to support farmers to establish community storage facilities which will help provide common storage facilities. In addition, government needs to sensitise and expand the Ware House Receipt system that will help to stabilise prices and also act as collateral for obtaining credit by farmers.
- Limit the level of fees and dues: The central government should intervene to limit the level of dues charged by the local authorities along the supply chains to reduce the effect of taxes on the farmers' incomes and the margins of traders.
- Establish market and trade information centres: Government needs to establish

market and trade information centres in all districts so as to boost both domestic and export marketing. The information centres need to be strengthened financially through increased budgetary allocation to enable them collect, store and disseminate market information up to sub-county level.

- • Provide subsidies: Government needs to provide targeted subsidies to smallholder farmers geared at improving the quality of produce; these can be channelled through their groups or associations.
- Needs to train farmers in modern farming and post harvest handling as part of the agricultural extension education.
- Regulate activities of the traders such as adherence to quality and standard weighing facilities.
- Need to improve the legal framework on contract-farming. For instance, contracts signed between farmers and buyers should be witnessed by local governments.
- Needs to facilitate the work of district commercial officers to enable them to effectively do their work.

b) Farmers

- Should embrace relationship marketing; where collaboration between them and traders is more structured.
- Should establish strong associations to help them improve the reliability and quality of their produce and contract obligations with traders.
- Should embrace the cooperative culture among themselves
- Need to embrace group marketing in order to reduce constraints to market access and increase their bargaining power.
- Need to strengthen their (farmer group) capacity to produce quality and high volume products.
- Need to change their attitudes; by treating farming as a business

c) Traders

- Should embrace relationship marketing; where collaboration between farmers and traders is more structured.
- Should establish associations to help them agree on quality standards for agricultural produce, negotiate with local authorities on the improvement of basic market facilities, and help in the settling of conflicts between traders and farmers.

d) NGOs

- Need to advise, train and encourage farmers to develop a cooperative culture through formation of SACCOs and Village Savings and Lending Associations (VSLAs).
- Need to educate farmers on how to deliver quality produce and post harvest handling.
- Advocate for local procurement of food by international organisations such as World Food Programme. The local procurement of food supplies can lead to higher incomes for farmers and transport agents, and increase local employment opportunities.
- Should direct their attention not only to the protection of small holder farmers, but also invest in improving relations with the informal traders. Supporting traders will not only

benefit traders, but will ultimately also benefit smallholder farmers.

- Should advocate for increased funding of the agricultural sector by government, especially in the area of market access.
- Should make farmers aware of their right to information, how they can make use of it, and how to influence its delivery. This can take a form of providing market information through local FM stations.
- Should encourage Participatory Market Chain Approach (PMCA)11 in order to engage smallholder farmers with other market chain actors to improve market access.
-

11 PMCA is an instrument for facilitating change in market chains that lack coordination, so creating an environment that fosters interaction among market chain actors, promotes mutual learning and trust and stimulates shared innovations (Bernet T., Thiele G. and Zschocke T., 2006).

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Annexes

Annex 1: Most common agricultural produce sold by farmers (%)

Type of Produce	Gulu			Lira			Combined		
	Male	Female	Total	Male	Female	Total	Male	Female	Total
Soya Beans	16.1	13.3	14.8	50.6	33.3	42.0	33.2	23.7	28.6
Maize	32.3	16.9	25.0	39.6	18.9	29.3	35.9	17.9	27.2
Beans	44.1	43.4	43.8	11.0	10.0	10.5	27.7	26.0	26.9
Simsim	30.1	36.1	33.0	7.7	5.6	6.6	19.0	20.2	19.6
Groundnuts (un shelled)	35.5	39.8	37.5	1.1	2.2	1.7	18.5	20.2	19.3
Millet	10.8	28.9	19.3	14.3	24.4	19.3	12.5	26.6	19.3
Rice	21.5	22.9	22.2	11.0	4.4	7.7	16.3	13.3	14.9
Goats	29.0	19.3	24.4	3.3	3.3	3.3	16.3	11.0	13.7
Sorghum	16.1	26.5	21.0	3.3	5.6	4.4	9.8	15.6	12.6
Sunflower	5.4	1.2	3.4	15.4	19.1	17.2	10.3	10.5	10.4
Cassava	16.1	15.7	15.9	5.5	3.3	4.4	10.9	9.3	10.1
Chicken	21.5	9.6	15.9	4.4	4.4	4.4	13.0	6.9	10.1
Cotton	4.3	1.2	2.8	8.8	16.7	12.7	6.5	9.3	7.8
Groundnuts (shelled)	14.0	8.4	11.4	0.0	0.0	0.0	7.1	4.1	5.6
Peas	5.4	10.8	8.0	0.0	2.2	1.1	2.7	6.4	4.5
Sweet Potatoes	6.5	8.4	7.4	0.0	2.2	1.1	3.3	5.2	4.2
Tomatoes	4.3	4.8	4.6	0.0	1.1	0.6	2.2	2.9	2.5
Milk	4.3	2.4	3.4	0.0	0.0	0.0	2.2	1.2	1.7
Oranges	3.2	2.4	2.8	0.0	0.0	0.0	1.6	1.2	1.4
Coffee	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Other	21.5	12.1	17.1	4.4	3.3	3.9	13.0	7.5	10.4

N.B. Percentages add-up to more than 100% due to multiple responses

Source: Survey Data

Annex 2: Farmers' rating of satisfaction indicators (%)

Market for Beans	Gulu			Lira			Combined		
	Males	Females	Total	Males	Females	Total	Males	Females	Total
Very satisfied	12.5	16.7	14.5	4.2	1.9	3.0	8.0	7.9	7.9
Fairly satisfied	47.5	55.6	51.3	12.5	17.0	14.9	28.4	32.6	30.5
Not very satisfied	25.0	16.7	21.1	41.7	39.6	40.6	34.1	30.3	32.2
Dissatisfied	15.0	11.1	13.2	41.7	41.5	41.6	29.6	29.2	29.4
Total	100	100	100	100	100	100	100	100	100

Market for Cassava	Gulu			Lira			Combined		
	Males	Females	Total	Males	Females	Total	Males	Females	Total
Very satisfied	9.5	11.8	10.5	2.3	9.8	6.4	4.7	10.3	7.6
Fairly satisfied	61.9	64.7	63.2	16.3	23.5	20.2	31.3	33.8	32.6
Not very satisfied	9.5	23.5	15.8	39.5	29.4	34.0	29.7	27.9	28.8
Dissatisfied	19.1	0.0	10.5	41.9	37.3	39.4	34.4	27.9	31.1
Total	100	100	100	100	100	100	100	100	100

Market for Maize	Gulu			Lira			Combined		
	Males	Females	Total	Males	Females	Total	Males	Females	Total
Very satisfied	8.3		5.7	1.4		0.8	3.7		2.1
Fairly satisfied	66.7	88.2	73.6	17.8	13.1	15.7	33.9	29.5	32.1
Not very satisfied	19.4	5.9	15.1	37.0	36.1	36.6	31.2	29.5	30.5
Dissatisfied	5.6	5.9	5.7	43.8	50.8	47.0	31.2	41.0	35.3
Total	100	100	100	100	100	100	100	100	100

Market for Millet	Gulu			Lira			Combined		
	Males	Females	Total	Males	Females	Total	Males	Females	Total
Very satisfied	0.0	13.6	9.4	4.76	0	2.13	3.85	4.05	3.97
Fairly satisfied	70.0	68.2	68.8	16.67	28.85	23.4	26.92	40.54	34.92
Not very satisfied	20.0	13.6	15.6	40.48	38.46	39.36	36.54	31.08	33.33
Dissatisfied	10.0	4.6	6.3	38.1	32.69	35.11	32.69	24.32	27.78
Total	100	100	100	100	100	100	100	100	100

Market for Rice	Gulu			Lira			Combined		
	Males	Females	Total	Males	Females	Total	Males	Females	Total
Very satisfied	15.0	16.7	15.8	11.6	9.8	10.6	12.7	11.6	12.1
Fairly satisfied	75.0	83.3	79.0	32.6	21.6	26.6	46.0	37.7	41.7
Not very satisfied	5.0	0.0	2.6	20.9	25.5	23.4	15.9	18.8	17.4
Dissatisfied	5.0	0.0	2.6	34.9	43.1	39.4	25.4	31.9	28.8
Total	100	100	100	100	100	100	100	100	100

Market for Simsim	Gulu			Lira			Combined		
	Males	Females	Total	Males	Females	Total	Males	Females	Total
Very satisfied	46.7	76.7	61.7	13.6	7.4	10.2	27.0	32.1	29.8
Fairly satisfied	43.3	20.0	31.7	34.1	35.2	34.7	37.8	29.8	33.5
Not very satisfied	6.7	0.0	3.3	31.8	27.8	29.6	21.6	17.9	19.6
Dissatisfied	3.3	3.3	3.3	20.5	29.6	25.5	13.5	20.2	17.1
Total	100	100	100	100	100	100	100	100	100

Market for Sunflower	Gulu			Lira			Combined		
	Males	Females	Total	Males	Females	Total	Males	Females	Total
Very satisfied		0.0	0.0		5.8	3.1		5.6	2.9
Fairly satisfied	60.0	0.0	42.9	8.7	15.4	12.2	13.7	14.8	14.3
Not very satisfied	0.0	50.0	14.3	37.0	40.4	38.8	33.3	40.7	37.1
Dissatisfied	40.0	50.0	2.9	54.4	38.5	45.9	52.9	38.9	45.7
Total	100	100	60	100	100	100	100	100	100

Market information (i.e. on prices)	Gulu			Lira			Combined		
	Males	Females	Total	Males	Females	Total	Males	Females	Total
Very satisfied	1.1	1.23	1.15	3.6	2.33	2.96	2.3	1.8	2.04
Fairly satisfied	6.5	9.88	8.05	4.8	13.95	9.47	5.7	11.98	8.75
Not very satisfied	55.9	56.79	56.32	34.9	31.4	33.14	46.0	43.71	44.9
Dissatisfied	36.6	32.1	34.48	56.6	52.33	54.44	46.0	42.51	44.31
Total	100	100	100	100	100	100	100	100	100

Behaviour of traders (individual)	Gulu			Lira			Combined		
	Males	Females	Total	Males	Females	Total	Males	Females	Total
Very satisfied	1.1	2.5	1.8	12.6	3.5	8.1	6.8	3.0	5.0
Fairly satisfied	4.4	6.3	5.3	8.1	11.6	9.8	6.2	9.1	7.6
Not very satisfied	47.8	40.5	44.4	31.0	34.9	33.0	39.6	37.6	38.6
Dissatisfied	46.7	50.6	48.5	48.3	50.0	49.1	47.5	50.3	48.8
Total	100	100	100	100	100	100	100	100	100

Behaviour of traders (companies)	Gulu			Lira			Combined		
	Males	Females	Total	Males	Females	Total	Males	Females	Total
Very satisfied									
Fairly satisfied	4.6	7.4	6.1	3.5	10.0	7.0	3.8	9.3	6.8
Not very satisfied	54.6	29.6	40.8	34.5	24.3	28.9	40.0	25.8	32.2
Dissatisfied	40.9	63.0	53.1	62.1	65.7	64.1	56.3	65.0	61.0
Total	100	100	100	100	100	100	100	100	100

General Prices of produce	Gulu			Lira			Combined		
	Males	Females	Total	Males	Females	Total	Males	Females	Total
Very satisfied	0.0	0.0	0.0	1.1	1.1	1.1	0.6	0.7	0.7
Fairly satisfied	8.6	5.0	6.9	4.4	8.0	6.2	6.2	6.8	6.5
Not very satisfied	47.1	41.7	44.6	27.5	30.7	29.1	36.0	35.1	35.6
Dissatisfied	44.3	53.3	48.5	67.0	60.2	63.7	57.1	57.4	57.3
Total	100	100	100	100	100	100	100	100	100

Access to markets (i.e. roads, tel. etc)	Gulu			Lira			Combined		
	Males	Females	Total	Males	Females	Total	Males	Females	Total
Very satisfied	0.0	1.2	0.6	8.8	2.3	5.6	4.5	1.8	3.2
Fairly satisfied	6.8	9.9	8.3	14.3	14.9	14.6	10.6	12.5	11.5
Not very satisfied	45.5	49.4	47.3	18.7	25.3	21.9	31.8	36.9	34.3
Dissatisfied	47.7	39.5	43.8	58.2	57.5	57.9	53.1	48.8	51.0
Total	100	100	100	100	100	100	100	100	100

Quality of market places (i.e. facilities)	Gulu			Lira			Combined		
	Males	Females	Total	Males	Females	Total	Males	Females	Total
Very satisfied	0.0	1.3	0.6	6.1	4.8	5.4	3.0	3.1	3.0
Fairly satisfied	0.0	1.3	0.6	12.2	17.9	15.1	5.9	9.8	7.8
Not very satisfied	37.9	34.2	36.1	14.6	23.8	19.3	26.6	28.8	27.7
Dissatisfied	62.1	63.3	62.7	67.1	53.6	60.2	64.5	58.3	61.5
Total	100	100	100	100	100	100	100	100	100

Private sector / NGO assistance	Gulu			Lira			Combined		
	Males	Females	Total	Males	Females	Total	Males	Females	Total
Very satisfied	0.0	0.0	0.0	8.7	2.7	5.6	5.6	2.2	4.0
Fairly satisfied	10.5	15.0	12.1	24.6	13.7	19.0	19.6	14.0	17.0
Not very satisfied	18.4	10.0	15.5	15.9	21.9	19.0	16.8	19.4	18.0
Dissatisfied	71.1	75.0	72.4	50.7	61.6	56.3	57.9	64.5	61.0
Total	100	100	100	100	100	100	100	100	100

Government assistance	Gulu			Lira			Combined		
	Males	Females	Total	Males	Females	Total	Males	Females	Total
Very satisfied	0.0		0.0	3.2		1.5	1.9		1.0
Fairly satisfied	2.3	0.0	1.4	7.9	5.4	6.6	5.7	3.9	4.8
Not very satisfied	7.0	14.3	9.9	27.0	23.0	24.8	18.9	20.6	19.7
Dissatisfied	90.7	85.7	88.7	61.9	71.6	67.2	73.6	75.5	74.5
Total	100	100	100	100	100	100	100	100	100

Source: Survey Data

Annex 3: Survey Instruments

Annex 3.1: Household Quantitative Survey Questionnaire

SEATINI-UGANDA

AGRICULTURAL MARKET ACCESS IN NORTHERN UGANDA

INDIVIDUAL FARMERS' QUESTIONNAIRE

August, 2013

Batch No. |___________|Questionnaire No. |____________|
Date: |_______|_______|_______|
Enumerator:
Name: ....
Signature: ....

Identification Particulars

District Name (Gulu =1; Lira =2)	
County/Municipality	
Division / Town Council/Sub-County	
Parish / Ward	
Rural/Urban (Urban =1; Rural =2)	
Name of Respondent:	
Tel Contact:	
Time at interview start:	
Time at interview end:	

Section 1: Respondent's Characteristics

Age (in years) ¨ 1 = 18-30 ¨ 2 = 31-42 ¨ 3 = 43- 54 ¨ 4 = 55 and above	Gender: [Observe] ¨ 1 = Male ¨ 2 = Female	Current Marital Status ¨ 1 = Never Married ¨ 2 = Married ¨ 3 = Widowed ¨ 4 = Divorced / Separated
Religion ¨ 1 = Protestant ¨ 2 = Catholic ¨ 3 = Moslem ¨ 4 = Seventh Day Adventist ¨ 5 = Pentecostal / Saved ¨ 6 = Other (specify)	Highest Level of Education ¨ 1 = No formal education ¨ 2 = Less than Primary ¨ 3 = Completed Primary ¨ 4 = Completed O-Level ¨ 5 = Completed A-Level ¨6=Completed University ¨ 7= College / Vocational ¨ 8= Other (Specify)	What is the respondent's main occupation? ¨ 1 = Subsistence farming ¨ 2 = Commercial farming ¨ 3 = Wage employment ¨ 4 = Trade and Commerce ¨ 5 = Casual labour ¨ 6= Unemployed ¨ 7= Other (specify)

What is the respondent's principal source of income? ¨ 1 = Subsistence farming ¨ 2 = Commercial farming ¨ 3 = Wage employment ¨4=Non-agricultural enterprises ¨ 5 = Casual Labour ¨ 6= Property income ¨7=Transfers (pension, social security benefits,) ¨ 8= Remittances from relatives ¨ 9= Other (specify)	How much money did the respondent spend during the last month? [Please insert number, insert 0 if none] UGX:[_________________]	Type of roof of the respondent's house [observe] ¨ 1 = Grass- Thatched ¨ 2 = Iron Sheets ¨ 3 = Tiles

Section 2: Market Access

Have you sold any agricultural produce during the last one year? ¨ 1 =Yes ¨ 2 =No è Q.2	State the reason, why? ¨ 1 =Don't produce enough ¨ 2 =Lack of market ¨ 3 =Not interested ¨ 4 =Other (specify) [End the interview and go to another respondent]	From where did you sell your produce? [Multiple response] ¨ 1 = Home (after harvest) ¨ 2 = Garden (before harvest) ¨ 3 = Market è Q.3A ¨ 4 = Store / warehouse ¨ 5 =Other (specify)
3A. What type of market do you mostly sell your produce? ¨ 1 =Village market □ ¨ 2 =Assembly market[2] ¨ 3 =Wholesale market□ ¨4=Roadside retail market[4]	Whom did you mostly sell your produce? ¨ 1 =Friend / Neighbour ¨ 2 =Traders (Individual) ¨ 3 =Traders (Company) ¨ 4 =Cooperative ¨ 5 =Gov't institutions (i.e. sch., hosp.etc) ¨ 6 =Private institutions / NGOs ¨ 7 =Other (specify)	What Distance did you travel to sell your produce? (approximate) ¨ 1 = Less than 1km ¨ 2 = 2-5km ¨ 3 = 6-10km ¨ 4 = more than 10km
What means of transport did you mostly use to transport your produce to the market? ¨ 1 = Foot ¨ 2 = Bicycle ¨ 3 = Motorcycle ¨ 4 = Vehicle ¨ 5 = Other (specify)	What is your main source of market information? [Multiple response] ☐1=Family/friends or neighbours ¨ 2 =Other Farmers ¨ 3=Traders ¨ 4 =Cooperative / SACCO ¨ 5 =Radio / Television ¨ 6 =Newspapers ¨ 7 =LC Official ¨ 8 =Billboards / posters ¨9=own research / visiting markets ¨ 10 =Other (specify)	What costs do you incur in the process of marketing your produce? [Multiple response] ¨ 1= None ¨ 2 = Hire of stalls ¨ 3= Communication (airtime) ¨ 4 = Market dues ¨ 5 = Transport ¨ 6 = Storage ¨ 7 = Accommodation ¨ 8 = Others (specify)

What type of agricultural produce did you sell? [multiple response] ☐1= Beans ☐2= Cassava ☐3= Chicken ¨4 =Goats ¨5= Groundnuts (shelled) ¨6= Groundnuts (un shelled) ¨7= **Maize** ¨8= Milk ¨ 9=**Millet** ¨ 10=Oranges ¨ 11=Peas ¨ 12=Rice ¨ 13=**Simsim** ¨ 14=**Sorghum** ¨ 15=Soya Beans ¨ 16=**Sunflower** ¨ 17=Sweet Potatoes ¨ 18= Tomatoes ¨ 19= Coffee ¨ 20= Cotton ¨ 21= Other (specify)	9A. Quantity sold (unit / measurement) ☐1=Beans [............./...........] ☐2=Cassava [............./...........] ¨ 3= Chicken [............./...........] ¨4= Goats [............./...........] ¨5= G/nuts (shelled [............./...........] ¨6=G/nuts (unshelled) [......../...........] ¨ 7 = **Maize** [............./...........] ¨ 8= Milk [............./...........] ¨9 = **Millet** [............./...........] ¨ 10 = Oranges [............./...........] ¨ 11 = Peas [............./...........] ¨ 12 = Rice [............./...........] ¨ 13 = **Simsim** [............./...........] ¨ 14 = **Sorghum** [............./...........] ¨ 15= Soya Beans [............./...........] ¨ 16 = Sunflower [............./...........] ☐17=Sweet Potatoes [............./...........] ¨ 18 = Tomatoes [............./...........] ¨ 19= Coffee [............./...........] ¨ 20= Cotton [............./...........] ☐21= Other (specify) [............./...........]	9B. What price? **(price/ unit)** ¨ 1= Beans [............./...........] ¨ 2 = Cassava [............./...........] ¨ 3= Chicken [............./...........] ¨ 4 = Goats [............./...........] ¨5= G/Nuts (shelled) [............/.........] ¨6=G/Nuts (unshelled) [......../........] ¨ 7 = **Maize** [............./...........] ¨ 8= Milk [............./...........] ¨ 9 = **Millet** [............./...........] ¨ 10 = Oranges [............./...........] ¨ 11 = Peas [............./...........] ¨ 12 = Rice [............./...........] ¨ 13 = **Simsim** [............./...........] ¨ 14 = **Sorghum** [............./...........] ¨ 15= Soya Beans [............./...........] ¨ 16 = Sunflower [............./...........] ☐17=Sweet Potatoes [............/.........] ¨ 18 = Tomatoes [............./...........] ¨ 19= Coffee [............./...........] ¨ 20= Cotton [............./...........] ☐21=Other (specify) [............/...........]
Are you a contract farmer? ¨ 1= Yes ¨ 2= No [Skip to Q.15]	Type of agricultural produce contracted [multiple response] ☐1= Maize ¨ 2= Millet ¨ 3= Rice ¨ 4= Simsim ¨ 5= Sorghum ¨ 6= Sunflower ¨ 7= Other (specify)	Name of the company you have a contract with -- -- --

How do you rate the performance of the company in terms of honouring the contract? ☐1= Very Good ¨ 2= Good ¨ 3= Fair ¨4= Poor ¨5= Very Poor ¨6= Refused to answer	Would you recommend another farmer/s to the company? ¨ 1= Yes ¨ 2= No è Q.14A	14A. State the reason, why you would not recommend someone else -- -- --
Are you aware of any organisation / company helping farmers to access markets ¨ 1 = Yes è Q.15A ¨ 2 = No [skip to Q.16]	15A. If, yes , name the organisation / companies -- -- --	Are you currently a member of any farmer's group? ¨ 1=Yes è Q.16A ¨ 2=No [skip to Q.18]
16A. How long have you been a member of this group? ¨ 1= less than 1 year ¨ 2= 1-3years ¨ 3= 4-6 years ¨ 4 = More than 6 years	What is the main aim of the group? [multiple response] ¨ 1= Production ¨ 2= Harvesting ¨ 3= Storage ¨ 4 = Collective Marketing è Q.17A ¨ 5 = Saving and lending ¨ 6 = Self Help ¨ 7 = Others (specify)	17A. How has the group helped you to access markets for your agricultural produce? [multiple response] ¨ 1= Market information ¨ 2= Access to finance (credit) ¨ 3 =Training ¨ 4= Market research ¨ 5= Others (specify)
Do you think you are exploited by the buyers of your agricultural produce? ¨ 1= Yes è Q.18A & Q.18B ¨ 2= No	18A.Whom do you think exploits you most?[multiple response] ¨ 1 =Friend / Neighbour ¨ 2 =Traders (Individual) ¨ 3 =Traders (Company) ¨ 4 =Cooperative ¨ 5 =Gov't institutions (i.e. sch., hosp.etc) ¨ 6 =Private institutions / NGOs ¨ 7 = Other (specify)	
18B.Why do you think you are exploited? -- -- -- --		

What constraints/challenges do you meet in the process of marketing your produce? [multiple response] ¨ 1 = High transport costs ¨ 2 = Poor communication (i.e. telephone network) ¨ 3 = High market dues ¨ 4 = Long distances to the markets ¨ 5 = Low prices offered ¨ 6 = Lack of market information ¨ 7 = Poor storage facilities ¨ 8 = Labour costs ¨ 9 = Others (specify)	

Section 3: Satisfaction with access to markets

Question	Indicator	Response
How do you rate market access of your produce during the last one year? [Ask about any changes during the last 1 year]		1=Improved 2=Same 3=Worsened 4=Not Applicable
	Beans	
	Cassava	
	Chicken	
	Goats	
	G/Nuts	
	Maize	
	Milk	
	Millet	
	Oranges	
	Peas	
	Rice	
	Simsim	
	Sorghum	
	Soya Beans	
	Sunflower	
	Sweet Potatoes	
	Tomatoes	
	Coffee	
	Cotton	

		1=Very satisfied 2=Fairly satisfied 3= Not very satisfied 4= Dissatisfied 5= Do not know
Kindly rate your level of satisfaction with the following aspects of access to market of your agricultural produce	Market for cassava	
	Market for simsim	
	Market for sunflower	
	Market for maize	
	Market for Beans	
	Market for Sorghum	
	Market for Millet	
	Market for Rice	
	Market information (i.e. on prices)	
	Behaviour of traders (individual)	
	Behaviour of traders (companies)	
	Prices of produce	
	Access to markets of your produce (i.e. roads, tel. etc)	
	Quality of market places (i.e. facilities)	
	Private sector / NGO assistance	
	Government assistance	
Overall access to market of your agricultural produce?		
Reasons for dissatisfaction (give most important three)		
What suggestions do you have to improve access to markets of you agricultural produce (give most important three)		

Annex 3.2: Government Quantitative Survey Questionnaire

SEATINI-UGANDA

AGRICULTURAL MARKET ACCESS IN NORTHERN UGANDA

GOVERNMENT INSTITUTIONS QUESTIONNAIRE

Batch No. I___________I Questionnaire No. I___________I
Enumerator's Name: .... Signature: ....

IDENTIFICATION PARTICULARS

District : ¨ 1 = Gulu ¨ 2 =Lira	
Name of Sub-County:	
Name of the Respondent:	
Position of the Respondent:	
Tel Contact:	
Date : (day/month/year)	
Time of the interview:	

SECTION 1: MARKET ACCESS

Are you are aware of government programme/s geared at enabling farmers access markets for their produce? ¨ 1 =Yes ¨ 2 =No è Q.6 to Q.10	If Yes in Q.1, mention the programme/s [List them] ....
Explain how the programmes are implemented (i.e. who are the target groups, how do farmers benefit etc)	
How effective have these programmes been in supporting farmers to access markets in your district / sub-county? [Rate each programme separately]	¨ 1 =Very Effective ¨ 2 = Effective ¨ 3 =Not Effective ¨ 4 = Don't know

What challenges has government faced in implementing these programmes?
....
....
....
....
....
....
....
....

Are you aware of any organisation / company helping farmers to access markets for their agricultural produce?
¨ 3=Worsened
¨ 1 = Yes è Q.6a
¨ 2 = No

6a. Name of organisation / company?
....
....
....
....
....
....

How do you rate access farmers' to agricultural markets during the last one year?
¨ 1=Improved
¨ 2=Same
¨ 4=Don't Know

What constraints/challenges do farmers face in the process of marketing their produce? [multiple response]
¨ 1 = High transport costs
¨ 2 = Poor communication (i.e. telephone network)
¨ 3 = High market dues
¨ 4 = Long distances to the markets
¨ 5 = Low prices offered
¨ 6 = Lack of market information
¨ 7 = Poor storage facilities
¨ 8 = Others (specify)

What proposals do you have to improve farmers' access to markets of their produce?
....
....
....
....
....
....

Why you think government is not having any programme on enabling farmers to access markets of their produce?
¨ 1= lack of funds
¨ 2= not government business /policy
¨ 3= private sector role
¨ 4= don't know
¨ 5= Other (specify)

Annex 3.3: Private Sector Quantitative Survey Questionnaire

SEATINI-UGANDA

AGRICULTURAL MARKET ACCESS IN NORTHERN UGANDA

PRIVATE SECTOR QUESTIONNAIRE

Batch No. I___________I Questionnaire No. I___________I

Enumerator's Name: .... Signature: ....

Identification Particulars

District : ¨ 1 = Gulu ¨ 2 =Lira	
Type ¨ 1 = Company ¨ 2 = Trader (Dealer) ¨ 3 = Trader (Retailer) ¨ 4 = Other (Specify)	
Name of the Respondent:	
Tel Contact:	
Date : (day/month/year)	
Time of the interview:	

Section 1: Market Access

Do you buy any agricultural produce? ¨ 1 =Yes è Q.1A, Q.1B, Q.1C ¨ 2 = No [skip to Q.2]	1A. How do you buy agricultural produce? ¨ 1 = Direct from farmers (farm gate) ¨ 2 = Through dealers ¨ 3 = Contract with farmers ¨ 4 = Others (specify)
1B. What is your main source of market information? [Multiple response] ¨ 1=Family /friends or neighbours ¨ 2 =Other Traders ¨ 3=Farmers ¨ 4 =Cooperative / SACCO ¨ 5 =Radio / Television ¨ 6 =Newspapers ¨ 7 =LC Official ¨ 8 =Billboards / posters ¨ 9 =Other (specify)	1C. What costs do you incur in marketing agricultural produce? [Multiple response] ¨ 1= None ¨ 2= Hire of stalls / shop ¨ 3= Communication (airtime) ¨ 4 = Market dues ¨ 5 = Transport ¨ 6 = Storage ¨ 7 = Accommodation ¨ 8 = Others (specify)

<table>
<tr><td colspan="2">Have you in any way helped farmers to access market of their agricultural produce?
¨ 1 =Yes è Q.2A
¨ 2 =No</td><td colspan="2">2A. If Yes, explain how?
....
....
....
....
....
......</td></tr>
<tr><td colspan="2">Are you aware of any organisation / company helping farmers to access markets?
¨ 1 = Yes è Q.3A
¨ 2 = No</td><td colspan="2">3A. Name of organisation / company?
....
....
....
....
....
...........</td></tr>
<tr><td colspan="2">Are you are aware of government programme/s geared at enabling farmers to access markets for their produce?
¨ 1 =Yes è Q.4A & Q.4B
¨ 2 =No è Q.5 to Q.7</td><td colspan="2">4A. If Yes, mention the programme/s [List them]
....
....
....</td></tr>
<tr><td colspan="3" rowspan="4">4B. How effective have these programmes been in supporting farmers to access markets? [Rate each programme separately]
....
....
....</td><td>¨ 1 =Very Effective
¨ 2 = Effective
¨ 3 =Not Effective
¨ 4 = Don't know</td></tr>
<tr><td></td></tr>
<tr><td></td></tr>
<tr><td></td></tr>
<tr><td colspan="4">How do you rate farmers' access to agricultural markets during the last one year?
¨ 1=Improved
¨ 2=Same
¨ 4= Don't Know</td></tr>
<tr><td colspan="4">What proposals do you have to improve farmers' access to markets of their produce?
....
....
....
....</td></tr>
<tr><td colspan="4">Why you think government is not having any programme to enable farmers to access markets of their produce? [only if No in Q.4]
¨ 1= lack of funds
¨ 2= not government business /policy
¨ 3= private sector role
¨ 4= don't know
¨ 5= Other (specify)</td></tr>
</table>

Annex 3.4: Focus Group Discussion Guide

SEATINI-UGANDA

AGRICULTURAL MARKET ACCESS IN NORTHERN UGANDA

FOCUS GROUP DISCUSSION CHECKLIST

	Activity	Mode
1	Understanding farmer's perceptions of access to agricultural markets *The discussion will be kick-started with a provocative statement meant to elicit responses in respect of how community members perceive agricultural markets:* "Access to agricultural markets is not a big problem farmers are facing in our community" The anticipated response categories will polarise those who are in support of the statement and those who oppose it. Care should be taken to exhaustively pursue the reasons advanced by each perspective. No attempt should be made to generate a consensus on the contradicting views; rather it is a deeper understanding of the factors that underlie and inform what people think about access to agricultural markets. Care should be taken also to capture voices in their exact formulation.	Facilitation of debate
2	Market access How do you market your produce? List the options What is your main source of market information? List and RANK them in order of importance What costs do you incur in the process of marketing your produce? List and RANK them in order of importance How do you rate market access of your produce during the last one year? Rate according to the following criteria: 1=Improved; 2=Same; 3=Worsened (record the numbers on each category) Kindly rate your level of satisfaction with access to market of your agricultural produce Rate according to the following criteria: 1=Very satisfied; 2=Fairly satisfied; 3= Not very satisfied; 4= Dissatisfied (record the numbers on each category) Are you aware of any programmes in your area that support farmers to access markets for their agricultural produce If yes, name them (note if government or private or NGO) Are you aware of any organisation / company helping farmers to access markets If Yes, List them Solicit views how they benefit	Brainstorming and Discussion
3	Challenges Do you think farmers are exploited by the buyers of their agricultural produce? If yes, why? State reasons (RANK them according to importance) Who do you think exploits the farmers most? List them (RANK them according to importance) What constraints/challenges do you meet in the process of marketing your agricultural produce? Suggestions to improve farmers' access to agricultural markets.	**Brainstorming and Discussion**