



Briquettes Market Study
Promoting Solar Powered Energy Efficient Stoves (PROSPER)
Project
Kyangwali Refugee Settlement and Host Communities



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1.

BACKGROUND AND METHODOLOGY

1.1 Background

Uganda is currently the largest refugee-hosting country in Africa, after surpassing Ethiopia and Kenya in early 2017. Violence and wars in the Great Lakes Region are some of the main causes of forced displacement into Uganda, led by South Sudan's conflict, insecurity and ethnic violence in the Democratic Republic of the Congo (DRC) and political instability and human rights violations in Burundi¹.

Kyangwali settlement is one of the largest among thirteen (13) main refugee settlements in Uganda with a population of over 125,039 refugees who mainly come from DRC (120,328 refugees); South Sudan (3,439 refugees); Rwanda (1,147 refugees); Burundi (104 refugees); Kenya (11 refugees); Somalia (7 refugees) and Sudan (2 refugees) according to UNHCR 2021. It is located in Kikuube district in the Western Uganda bordered by DRC in the west, Hoima district in the North and Kagadi in the South.

Most of refugee and host community household in Kyangwali cook using firewood due to lack of energy-efficient alternatives. Given the scarcity of natural resources in Kyangwali, there is a huge demand for an affordable and accessible fuel alternative for refugee and host communities. This problem is of a great impact to women and children as they tend to spend the most time exposed to indoor air pollutants and burden of gathering fuel also falls on them. In Kyangwali female refugees are exposed to Gender-based violence (GBV) on their paths to collect fuel².

It is against this backdrop that the project: **Promoting Solar Powered Energy Efficient Stoves (PROSPERS)** in Kyangwali Refugee Settlement was conceived to promote accessibility to quality and affordable clean energy solutions to refugees and host communities.

1.2 About the PROSPERS Project

PROSPERS is a partnership project implemented by Kabarole Research and Centre (KRC), Care International – Uganda and African Clean Energy (ACE) with funding from the Dutch Relief Alliance. The main objective is to promote accessibility to quality and affordable clean energy solutions to refugees and host communities with special attention to women and girls and it targets a total of 700 households, 70% refugees in Kyangwali refugee settlement and 30% from the host community of Kyangwali and Kabwoya Sub Counties in Kikuube District, Bunyoro Sub Region, Mid-western Uganda.

The PROSPERS project promotes energy innovations which include; access to ACE One stove manufactured and distributed by African Clean Energy through a credit model with installments payable in 18 months. The ACE innovation package includes the ACE One stove, solar panel, a lamp, 4G Android smartphone with a pre-installed ACE Connect app which enables customers to manage their loan repayments, and contact customer services directly. The ACE one stove innovation is promoted alongside the briquette model enriched with action research and gender inclusion. The project has supported 10 groups with briquette machines for briquette production and marketing.

A situation analysis for the project was conducted in Kyangwali refugee settlement and found out that marketing of briquettes was a key challenge for the groups already involved in briquette production amidst a huge refugee population that would provide ready market for briquettes.

¹ Uganda Country Refugee Response Plan; The integrated response plan for refugees from South Sudan, Burundi and the Democratic Republic of the Congo; January 2019 – December 2020

² PROSPERS- Dutch relief alliance.org

This report is an output of a field consultative market survey on briquettes that was conducted between December 2021 and February 2022. The survey has generated credible market information and a Briquettes Marketing Strategy – a critical objective of the PROSPERS project.

This study report highlights the following aspects:

- i. Market and value chain analyses of briquettes to map out sustainable market potential, opportunities for Briquette, the necessary policies, systems to support briquette use and production in Kyangwali refugee settlement as well as host community of Kikube District, Hoima and Kampala
- ii. A highlight of strategic market entry points and undertakings to enhance community participation through bulk briquette production in Kyangwali refugee settlement and its host communities.
- iii. An assessment of current sources and cost of energy used by the target market as well as examine available briquette market opportunities with clear assessment of cooking energy needs, quantity/quality demands and demand periods.
- iv. Capacity gaps and challenges associated with sustainable harvesting, utilization and marketing of briquettes both at household and institutional levels in the local communities.
- v. Attached marketing strategy for briquettes that can be adopted by briquette producers in Kyangwali Refugee settlement and its host community.

1.4 Methodology

1.4.1 Study Design

The study adopted a combination of quantitative and qualitative study designs. A mixed-methods approach, “involve[s] the collection, analysis, and integration of quantitative and qualitative data in a single or multi-phase study” (Hanson, *et al.*, 2005). The report took input from desk review of existing literature, consultations with key stakeholders such as the key high-level stakeholders, including the district local government officials from production, Environment and Community-based Services departments in Kikuube district. Other informants included: settlement leaders such as camp commandants, Refugee welfare Chairperson (RWC) and block leaders one Focus Group Discussion with a selected women group that benefited from the project.

1.4.2 Geographical Scope and Targeted respondents

This study was carried out in Kikuube and Hoima Districts targeting refugees and host communities' households, institutions such as schools, hotels, restaurants, prisons, hospitals and health centres, NGOs supporting Persons with Special Needs, energy sector law enforcement personnel, a business community with main focus on energy-related trade among others. Kampala market potential targeted with focus on bulk buyers that can link directly with producers.

1.4.3 Sampling and sample size determination

The quantitative sample size was determined following Kish and Lesley formula for cross-sectional study designs, given by;

$$n = \frac{z^2 p(1-p)N}{z^2 p(1-p) + N(e)^2}$$

Where;

Z, is 1.96 corresponding to a confidence interval of 95%

p, is estimated prevalence of clean energy use. We assumed a prevalence of 50% since we could not get prevalence rates from literature; therefore, p=0.5

q, is 1-p = 1-0.5=0.5

d, Precision/error and we used a 5% precision which translates to 0.05

N= (1.962 x 0.5 x 0.5)/0.052 = 0.9604/0.0025

n=384.16

n=384 (correct to 3 significant figures)

This sample was proportionately distributed between the refugees and host communities following the recommended 70%: 30% government of Uganda Humanitarian nexus

1.4.4 Data Collection Methods and Instruments

The employed range of quantitative and qualitative data collection method that included:

- i. Desk Review especially around Briquettes sub-sector in Uganda and the region;
- ii. Conducting Key Informant Interviews (KIIs) within the settlement and Kikuube District
- iii. Conducting Focus Group Discussions (FGDs) with one women beneficiary group
- iv. Conducting a household Survey that covered 389 respondents
- v. Observation techniques especially on the quality assessment of briquettes and stoves
- vi. Photography to back up recorded evidence from site visits.

1.4.5 Data Analysis and Synthesis of Information

Quantitative data was analyzed quantitatively using appropriate analysis techniques. While using descriptive statistics i.e., (mean, 95% confidence intervals, frequency, proportions, percentages, cross-tabulations and totals showing trends over time) the report shows tables aligned to the themes of the study. Measures of variability such as standard deviation was generated using SPSS software

Qualitative data analysis techniques (quality and thematic analysis techniques) helped the team to analyze qualitative data items collected from key informant interviews and a desk review. The findings fed into a corroborate interpretation of the results from the quantitative data and informed the market strategy.

2. BRIQUETTES MARKET SURVEY FINDINGS

2.1 key Demographic Characteristics

Refugees constituted most of the respondents (67%) compared to 32.6% from the host communities. Since this project targeted women and girls, the gender contribution to this sample was disproportionate (since this was purposively set prior to respondent selection) with 76.3% being female. Most of the respondents (57.8%) were adults (over 30 years) because the respondent selection targeted head of households and women in households (or spouses) who actually cooked using various energy sources. As seen from the table 2.1 below, only 10% of respondents had a form of disability. Owing to the fact that purposively, the survey targeted adults, the majority were married 64.8% compared to only 14.1% had never been married.

Table 2. 1: Key Demographic Characteristics of Respondents

Sub County	No. of People	Percentage (%)
Respondent category		
Refugee	262	67.4
Host	127	32.6
Gender:		
Male	92	23.7
Female	297	76.3
Age Group:		
Youth (18-30 years)	164	42.2
Non youth (31-75years)	225	57.8
Marital status:		
Single/Never married	55	14.1
Ever married or lived together	252	64.8
Separated/Divorced	50	12.9
Widowed	32	8.2
Disability status:		
PWD	41	10.5
Non PWD	348	89.5
Overall	389	100

In terms of education the majority of the respondents (over half) had not completed primary school (55.5%). Its only 2.1% of the respondents that possessed an A 'level qualification. Education has a bearing on use of alternative energy sources. It is more educated and more Enlightened household that often explore better or more efficient energy sources than those with no formal education. In terms of information seeking behavior and acceptance of change, the PROSPERS project shall require to depend on traditional systems, use of local dialets in passing on information and using more resources to reach grassroots (mainly through opinion leaders). Use of formal communication would not serve the majority of the targeted population given this low level of formal education.

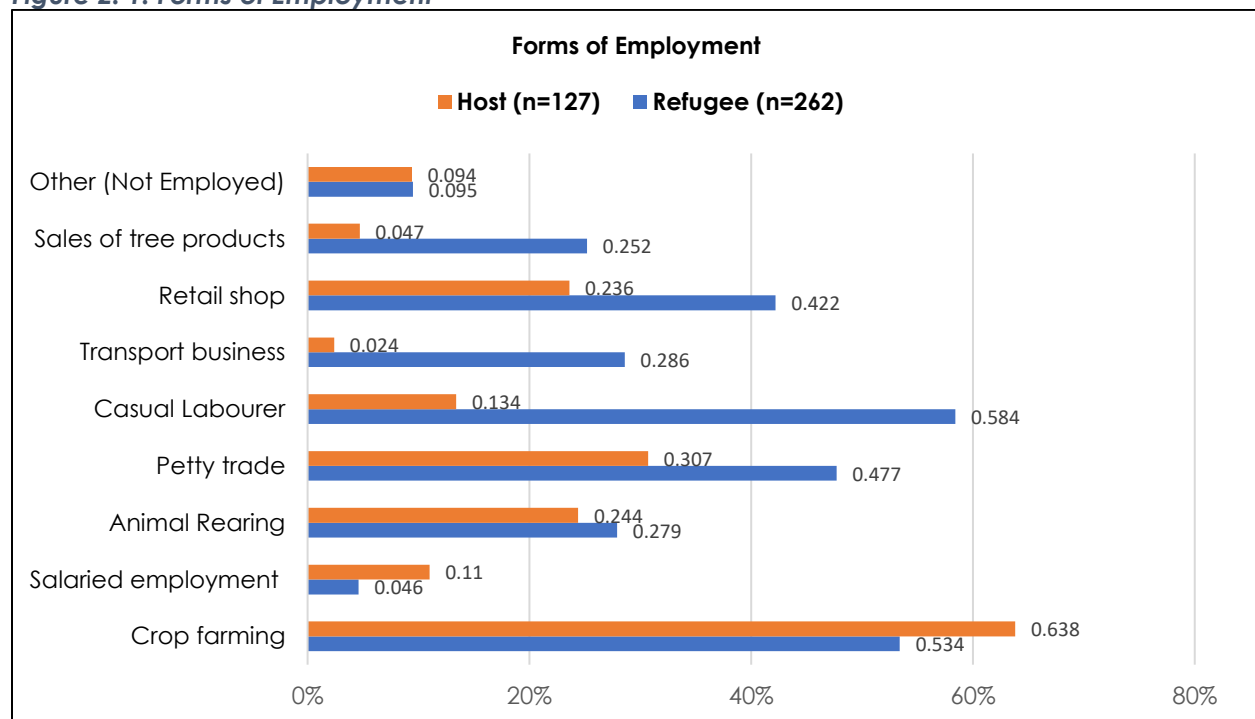
Using flyers, billboards, messaging would be therefore most efficient with use of local language and community mobilizers at the grassroots (for instance in conducting door to door awareness campaigns).

Table 2. 2: Formal education

Sub County	No. of People	Percentage (%)
Education:		
Non formal	103	26.5
Incomplete Primary	113	29
Complete primary	59	15.2
Incomplete O level	50	12.9
Complete O level	45	11.6
Incomplete A Level	5	1.2
Complete A level	1	0.3
Vocational education	12	3
University	1	0.3
Overall	389	100

Another aspect that is critical to this process is the forms of employment in which various household members are engaged. This is critical for two reasons: It determines income profiles, use of various energy sources, lifestyle and live choices including on selection for a particular energy form. As seen from the figure below, the overwhelming majority of households are engaged in either crop farming or casual labor. Others that are in other forms of employment are related to the agricultural sector (livestock). Youth are most engaging in petty trade and retailing. However, it was important to observe a substantial proportion of those employed in sale of tree products.

Figure 2. 1: Forms of Employment



Source: KRC Briquettes Market Survey in Kyangwali, Kikuube 2022

As seen from the table below, the above forms of employment are linked to individual and household incomes. As shown in the table below, monthly incomes at household level average only UGX 132,149 which US\$ 38. Incomes are higher for males and less for Persons with Disabilities but also above the overall average for households in host communities. Income levels are key in

determination of purchase options at the household level. The higher the income the more spread the spending decisions and opportunities.

Table 2. 3: Average monthly income

Characteristic	Average monthly Income (UGX)	No. of People
Category of the respondent:		
Refugee	106,855	262
Host	184,331	127
Gender:		
Male	144,859	92
Female	128,212	297
Age Group:		
Youth (18-30 years)	123,762	164
Non youth (31-75years)	138,262	225
Disability status:		
PWD	118,488	41
Non PWD	133,759	348
Overall	132,149	389

2.2 Energy Sources

The market survey deduced that overwhelmingly the majority of households are using firewood for cooking (87.7%). This is followed by cooking using charcoal (71.2%). Follow-up responses showed that most households actually used both firewood and charcoal. **This is followed by 42.7% who are using briquettes.** Only 2.8% and 1.5% are using liquefied petroleum gas and electricity respectively, as shown below.

Table 2. 4: Household source of cooking Energy

Source	Refugee (n=262)	Host (n=127)	Overall (n=389)
	Yes (%)	Yes (%)	Yes (%)
Grasses and sticks	37.8	11.0	29.0
Firewood	95.4	71.7	87.7
Woodlots	10.3	13.4	11.3
Briquettes	46.2	35.4	42.7
Charcoal	73.3	66.9	71.2
Gas	3.1	2.4	2.8
Electricity	0.0	1.5	1.5
NB Allowed for multiple answering			

In terms of preference of energy source (on a scale of 1-5, please select your preferred source of energy. Where 1 = Least preferred; 2 =somehow a little preferred; 3 = Moderately preferred; 4= Preferred; 5= Mostly preferred) still majority of households prefer firewood (77.6%) and 74.8% preference for charcoal **compared to only 31.9% for briquettes.** A substantive number of households (30.6%) and 27.2% mentioned a preference for maize and crop residues respectively – an indication of the use of biomass as an energy source especially at end of harvest periods.

Table 2. 5: Different levels of preference for variances in uses of different types of energy sources

Energy type	Refugee (n=262)		Host (n=127)		Overall (n=389)	
	Preferred (%)	Not preferred (%)	Preferred (%)	Not preferred (%)	Preferred (%)	Not preferred (%)
Briquettes	23.7	76.3	48.8	51.2	31.9	68.1
Charcoal	74.0	26.0	76.4	23.6	74.8	25.2
Solar	12.2	87.8	7.9	92.1	10.8	89.2
Firewood	88.2	11.8	55.9	44.1	77.6	22.4
Paraffin	6.9	93.1	1.6	98.4	5.1	94.9
Electricity	2.3	97.7	3.1	96.9	2.6	97.4
Biogas	0.8	99.2	6.3	93.7	2.6	97.4
Maize cobs	34.0	66.0	23.6	76.4	30.6	72.8
Crop residues	34.7	65.3	11.8	88.2	27.2	72.8

The survey sought to ascertain the reason for preference for a particular energy source, the results as shown below showed, was mainly on availability (51.4%) followed by efficiency (how long the fuel fires). Only 10% mentioned price as a factor in dictating their preference. This means with broader availability of briquettes, uptake will be high with effective delivery modes.

Table 2. 6: Reason for preference of a specific energy source

Characteristic	Price (%)	Availability (%)	Time fuel takes to ignite (%)	How long it burns (%)	Compatibility with the stove (%)	Less smoke (%)	Total (%)	No. of People
Category of the respondent								
Refugees	13.5	43.9	19.8	15.6	5.7	1.5	100	262
Host	3.1	66.9	0.9	8.7	3.9	16.5	100	127
Gender:								
Male	15.2	58.7	8.7	3.3	5.4	8.7	100	92
Female	8.4	49.2	15.2	16.5	5.1	5.6	100	297
Age Group								
Youth (18-30 years)	13.4	48.8	13.4	13.4	4.9	6.1	100	164
Non youth (31-75years)	7.6	53.3	13.8	13.3	5.3	6.7	100	225
Marital status:								
Single/Never married	12.7	58.2	7.3	7.3	1.8	12.7	100	55
Ever married or lived together	9.9	50	16.3	14.3	6	3.5	100	252
Separated/Divorced	8	44	12	14	8	14	100	50
Widowed	9.4	62.5	6.3	15.6	0	6.2	100	32
Education								
Non formal	7.8	64.1	12.6	8.7	2.9	3.9	100	103
Primary	12.2	45.9	15.7	16.3	5.8	4.1	100	172
Secondary +	8.8	48.2	11.4	13.2	6.1	12.3	100	114
Disability status								
PWD	12.2	61	9.8	12.2	2.4	2.4	100	41
Non PWD	9.8	50.3	14	13.5	5.5	6.9	100	348
Overall	10	51.4	13.6	13.4	5.1	6.5	100	389

As seen from the table above, it is mostly respondents in the host communities that were more concerned about availability (but also surprisingly more male than female) as well as persons with disabilities.

Asked from where they obtained their sources of energy, the majority of the household mentioned that they got (mostly firewood which is most used source of fuel) from the designated forest reserve. Others 32% purchased (mostly charcoal) from shop and market vendors with only 6.4% reporting to having directly purchased briquettes from producers.

Table 2. 7: From where did you obtain your source of energy

Source of Energy	Refugee (n=262) %	Host (n=127) %	Overall (n=389) %
From the wild	5	32.3	13.9
From the designated forest reserve	47.7	5.5	33.9
From the refugee settlement	18.3	0.8	12.6
Purchase from vendors	20.2	57.5	32.4
Produce my own briquettes	8.4	2.4	6.4
Others	0.4	1.6	0.8

Most of the households (58.9%) got to know about briquettes from neighbor or friend. Others (46% heard either local leaders or local NGOs. About 32.4% obtained information about briquettes from the PROSPERs project interventions (in table 2.8 below), but allowed for multiple answering.

Table 2. 8: Source of knowledge about various energy sources

	Refugee (n=262)	Host (n=127)	Overall (n=389)
	Yes (%)	Yes (%)	Yes (%)
SACCO or VSLA	37.8	10.2	28.8
Neighbor or Friend	68.3	39.4	58.9
Local or international NGO	51.1	35.4	46.0
Local Leaders	56.1	25.2	46.0
PROSPECTS Project	26.0	45.7	32.4
Other news outlets	2.3	0.8	1.8

Overall, 62.2% of refugees and 52.8% in host communities have ever used briquettes. The highest category of users of briquettes was youth (56.7%) and respondents that had completed secondary schooling (65.8%) hence a drawn linkage between education attainment and use.

Table 2. 9: Ever used Briquettes?

Characteristic	Yes (%)	No (%)	Total (%)	No. of People
Category of the respondent				
Refugees	62.2	37.8	100	262
Host	52.8	47.2	100	127
Gender:				
Male	51.1	48.9	100	92
Female	61.6	38.4	100	297
Age Group				
Youth (18-30 years)	56.7	43.3	100	164
Non youth (31-75years)	60.9	39.1	100	225
Education:				
Non formal	51.5	48.5	100	103
Primary	59.3	40.7	100	172
Secondary +	65.8	34.2	100	114
Disability status:				
PWD	51.2	48.8	100	41
Non PWD	60.1	39.9	100	348
Overall	59.1	40.9	100	389

2.3 Pricing of briquettes

Households in the refugees' settlement are willing to pay UGX 474.02 per kilo of briquettes. Owing to the fact that one half bag of briquettes weighs 60kgs, this translates to UGX 28,441. This is higher than charcoal in the same area where a 60kg bag goes for UGX 23,500. In the host communities the price is slightly higher (UGX 498.80 per kilo of briquettes) but not significantly.

Table 2. 10: How much are you willing to pay for a kilo of briquettes

Characteristic	Payment for a kg of Briquettes	No. of People
Category of the respondent:		
Refugee	474.02	127
Host	498.80	125
Gender:		
Male	487.86	70
Female	485.71	182
Age Group:		
Youth (18-30 years)	510.19	103
Non youth (31-75years)	469.80	149
Disability status:		
PWD	452.17	23
Non PWD	489.74	229
Overall	486.31	252

Table 2. 11: Would you recommend use of briquettes?

Characteristic	Yes (%)	No (%)	Total (%)	No. of People
Category of the respondent				
Refugees	84.0	16.0	100	262
Host	63.0	37.0	100	127
Gender:				
Male	73.9	26.1	100	92
Female	78.1	21.9	100	297
Age Group				
Youth (18-30 years)	80.5	19.5	100	164
Non youth (31-75years)	74.7	25.3	100	225
Marital status:				
Single/Never married	67.3	32.7	100	55
Ever married or lived together	81.7	18.3	100	252
Separated/Divorced	78.0	22.0	100	50
Widowed	56.2	43.8	100	32
Education:				
Non formal	72.8	27.2	100	103
Primary	83.1	16.9	100	172
Secondary +	71.9	28.1	100	114
Disability status:				
PWD	58.5	41.5	100	41
Non PWD	79.3	20.7	100	348
Overall	77.1	22.9	100	389

The survey also found out that there were varying reasons why past users of briquettes discontinued its use. As shown in table 2.12 on the next page, the reason given by the majority of respondents was lack of availability.

Table 2. 12: Reason for discontinued use of briquettes

	Refugee %	Host %	Overall %
Cost- got a cheaper option	3.5	0.9	2.5
Unavailability	27.9	29.3	28.3
Not efficient- too much fuel consumed	16.9	2.4	11.4
Took too long to ignite	20.3	1.6	13.3
Low heat	7.5	2.4	5.6
Not Applicable	23.9	63.4	38.9

NB: Those that selected Not applicable are still using briquettes

The survey also sought to assess the level of training offered either by this project or any other project on the use of energy efficient cook stoves. 78.2% in refugee settlement and 62.2% in host communities had received this kind of training at least once. Most of this training had been provided mainly to women (75.8%) compared to men (64.1%).

Table 2. 13: Ever received training on using efficient cook stoves

Characteristic	Yes (%)	No (%)	Total (%)	No. of People
Category of the respondent				
Refugees	78.2	21.8	100	262
Host	62.2	37.8	100	127
Gender:				
Male	64.1	35.9	100	92
Female	75.8	24.2	100	297
Age Group				
Youth (18-30 years)	74.4	25.6	100	164
Non youth (31-75years)	72.0	28.0	100	225
Marital status:				
Single/Never married	56.4	43.6	100	55
Ever married or lived together	77.8	22.2	100	252
Separated/Divorced	82.0	18.0	100	50
Widowed	50.0	50.0	100	32
Education:				
Non formal	70.9	29.1	100	103
Primary	74.4	25.6	100	172
Secondary +	72.8	27.2	100	114
Disability status:				
PWD	61.0	39.0	100	41
Non PWD	74.4	25.6	100	348
Overall	73.0	27.0	100	389

The study further deduced that at the household level, energy efficient cook stoves are used by 61.8% of households in the refugee settlement and 57.5% among those in host communities. This is mainly because of various projects targeting refugees on renewable energy.

Table 2. 14: Does your household use Energy Efficient Cook-stove for cooking?

Characteristic	Yes (%)	No (%)	Total (%)	No. of People
Category of the respondent				
Refugees	61.8	38.2	100	262
Host	57.5	42.5	100	127
Gender:				
Male	48.9	51.1	100	92
Female	64.0	36.0	100	297
Age Group:				
Youth (18-30 years)	56.1	43.9	100	164
Non youth (31-75years)	63.6	36.4	100	225
Marital status:				
Single/Never married	34.5	65.5	100	55
Ever married or lived together	64.3	35.7	100	252
Separated/Divorced	78.0	22.0	100	50
Widowed	46.9	53.1	100	32
Education:				
Non formal	54.4	45.6	100	103
Primary	61.0	39.0	100	172
Secondary +	64.9	35.1	100	114
Disability status:				
PWD	48.8	51.2	100	41
Non PWD	61.8	38.2	100	348
Overall	60.4	39.6	100	389

Finally, the survey found out from among those that used energy cooking stoves, the majority (35%) used three cooking stones (these are for use of firewood). For energy cooking stoves the majority used ceramic liner stoves (28.2%) in refugee settlement and others (26%) in host communities (where others referred to clay or ceramic stoves mainly). Respondents that used the ACE 1 stoves introduced by the project that were part of the sample were 21% in the refugee settlement and 7.1% in the host communities.

Table 2. 15: What type of energy cooking stoves are you using?

	Refugee (n=262)	Host (n=127)	Overall (n=389)
	%	%	%
Three cooking stones	31.3	42.5	35
Portable stoves	19.1	22	20.1
ACE 1 stoves	21	7.1	16.4
Ceramic liner stoves	28.2	2.4	19.8
Others	0.4	26	8.7

2.5 Financial Services and related information

The majority of respondents 82.8% in refugee settlement and 59.1% in host communities are aware of existence of financial services and income sources in the area (highest proportion among these (82.1%) among married couples). This is important because households can access (if credit worth) financial services.

Table 2. 16: Are you aware of any potential existing income sources in this area?

Characteristic	Yes (%)	No (%)	Total (%)	No. of People
Category of the respondent				
Refugees	82.8	17.2	100	262
Host	59.1	40.9	100	127
Gender:				
Male	77.2	22.8	100	92
Female	74.4	25.6	100	297
Age Group				
Youth (18-30 years)	80.5	19.5	100	164
Non youth (31-75years)	71.1	28.9	100	225
Marital status:				
Single/Never married	58.2	41.8	100	55
Ever married or lived together	82.1	17.9	100	252
Separated/Divorced	70.0	30.0	100	50
Widowed	56.2	43.8	100	32
Education:				
Non formal	80.6	19.4	100	103
Primary	75.6	24.4	100	172
Secondary +	69.3	30.7	100	114
Disability status:				
PWD	63.4	36.6	100	41
Non PWD	76.4	23.6	100	348
Overall	75.1	24.9	100	389

According to the survey results, only 50.4% of respondents in the refugee settlement belonged to a Village Saving *and Loans Association (VSLA)*

Table 2. 17: Current membership in Village Saving and Loans Association (VSLA)

Characteristic	Yes (%)	No (%)	Total (%)	No. of People
Category of the respondent				
Refugees	50.4	49.6	100	262
Host	74.0	26.0	100	127
Gender				
Male	59.8	40.2	100	92
Female	57.6	42.4	100	297
Age Group				
Youth (18-30 years)	53.7	46.3	100	164
Non youth (31-75years)	61.3	38.7	100	225
Marital status				
Single/Never married	45.5	54.5	100	55
Ever married or lived together	58.7	41.3	100	252
Separated/Divorced	72.0	28.0	100	50
Widowed	53.1	46.9	100	32
Education				
Non formal	62.1	37.9	100	103

Characteristic	Yes (%)	No (%)	Total (%)	No. of People
Primary	55.8	44.2	100	172
Secondary +	57.9	42.1	100	114
Disability status				
PWD	70.7	29.3	100	41
Non PWD	56.6	43.4	100	348
Overall	58.1	41.9	100	389

Asked whether respondents had ever received training on savings and credit management, the majority of household members in both refugee (87.9%) and host communities (83%) had received such training – pointer to why uptake was high.

Table 2. 18: As a member received training on savings and credit management

Characteristic	Yes (%)	No (%)	Total (%)	No. of People
Category of the respondent				
Refugees	87.9	12.1	100	132
Host	83.0	17.0	100	94
Gender				
Male	81.8	18.2	100	55
Female	87.1	12.9	100	171
Age Group				
Youth (18-30 years)	86.4	13.6	100	88
Non youth (31-75years)	85.5	14.5	100	138
Marital status				
Single/Never married	80.0	20.0	100	25
Ever married or lived together	85.8	14.2	100	148
Separated/Divorced	88.9	11.1	100	36
Widowed	88.2	11.8	100	17
Education				
Non formal	90.6	9.4	100	64
Primary	85.4	14.6	100	96
Secondary +	81.8	18.2	100	66
Disability status				
PWD	86.2	13.8	100	29
Non PWD	85.8	14.2	100	197
Overall	85.8	14.2	100	226

To ascertain the level of engagement in the VSLA for those who reported to be members of these groups, it was deduced that 60.3% of households in host communities had ever borrowed from the VSLA compared to 37.1% for households in refugee settlement.

Table 2. 19: Have you ever borrowed from a VSLA

Characteristic	Yes (%)	No (%)	Total (%)	No. of People
Category of the respondent				
Refugees	37.1	62.9	100	116
Host	60.3	39.7	100	78
Gender:				
Male	53.3	46.7	100	45
Female	44.3	55.7	100	149
Age Group				
Youth (18-30 years)	30.3	69.7	100	76

Characteristic	Yes (%)	No (%)	Total (%)	No. of People
Non youth (31-75years)	56.8	43.2	100	118
Marital status:				
Single/Never married	30.0	70.0	100	20
Ever married or lived together	47.2	52.8	100	127
Separated/Divorced	59.4	40.6	100	32
Widowed	33.3	66.7	100	15
Education:				
Non formal	44.8	55.2	100	58
Primary	36.6	63.4	100	82
Secondary +	63.0	37.0	100	54
Disability status:				
PWD	60.0	40.0	100	25
Non PWD	44.4	55.6	100	169
Overall	46.4	53.6	100	194

In terms of saving, by the time of the survey, only 32.4% and 37% of households in refugee settlement and host communities had any monthly savings with VSLAs. This points to a very low saving culture, or low household incomes based on subsistence with little or nothing to save.

Table 2. 20: Currently with Savings with a VSLA

Characteristic	Yes (%)	No (%)	Total (%)	No. of People
Category of the respondent				
Refugees	32.4	67.6	100	262
Host	37.0	63.0	100	127
Gender				
Male	34.8	65.2	100	92
Female	33.7	66.3	100	297
Age Group:17				
Youth (18-30 years)	36.0	64.0	100	164
Non youth (31-75years)	32.4	67.6	100	225
Marital status				
Single/Never married	40.0	60.0	100	55
Ever married or lived together	32.9	67.1	100	252
Separated/Divorced	34.0	66.0	100	50
Widowed	31.3	68.7	100	32
Education				
Non formal	35.0	65.0	100	103
Primary	32.0	38.0	100	172
Secondary +	36.0	64.0	100	114
Disability status				
PWD	22.0	78.0	100	41
Non PWD	35.3	64.7	100	348
Overall	33.9	66.1	100	389

MARKETING STRATEGY FOR BRIQUETTES

3. MARKETING STRATEGY FOR BRIQUETTES

3.1 Vision

The Vision statement for the Briquettes Marketing Strategy is:

Clean and Conserved Environment from Wider Use of Briquettes

3.2 Mission

The Mission statement for the strategy is

Ensuring Accessibility and Affordability of Briquettes

3.3 Goal

The Goal statement for this strategy is

Wider use of briquettes as a feasible energy alternative for a conserved environment and sustainable livelihoods for all value chain actors

3.4 Objectives

The following are the objectives of this strategy

- i. To ensure accessibility of quality briquettes for wider use at ease-of-reach point
- ii. To ensure affordability of quality briquettes by bringing down its price
- iii. To create awareness and sensitize masses on feasibility of using quality briquettes
- iv. To support scaled up quality briquettes production as a panacea to bring down the price
- v. Strengthening public private partnerships in quality briquettes production and marketing
- vi. Integrate and mainstream cross-cutting issues in wider quality briquettes production (including women, children, persons with disability, reducing gender-based violence, saving the environment from degradation as well as contributing to reduction of HIV/AIDS)

3.5 Marketing Strategies

The following are the key marketing strategies;

3.5.1 To ensure accessibility of briquettes for wider use at ease-of-reach point

For ensuring briquettes reach the last mile user the following will be the interventions that will be required to ensure accessibility of briquettes and to drum up use at all levels:

- i. **Ensuring that quality briquettes are readily available** at all markets and shops just like charcoal. This means that all actors across the production value-chain should be supported to massively produce and put at **fronts of market and shop stalls** where regularly users obtain all other retail merchandise.
- ii. Ensuring that a network is supported **for wider distribution of quality briquettes** from places where they are produced to places where they are demanded.

- iii. Enhancing **investment in packaging** so that users obtain various sizes and volumes of packs from the smallest units to larger ones.

3.5.2 To ensure affordability of briquettes by bringing down its price

To ensure (in comparison and in competition with charcoal and firewood) that the price for briquettes is reduced, the following will be the key interventions

- i. **Reduction of production costs** by scaling production of inputs (clay, soil, charcoal ash, biomass, agricultural residues (sugarcane husks, maize cobs, coffee husks, groundnut shells, tobacco dust, sunflower hulls, rice straws and husks among others)
- ii. **Investing in mechanization** where various production centers have enduring higher capacity equipment for mass production
- iii. **Providing incentives for pace-setter** (those currently in production of briquettes and able to supply poultry farms, restaurants, hotels, hospitals, prisons, schools and offices among others)

3.5.3 To create awareness and sensitize masses on feasibility of using briquettes

For the marketing strategy to hold, it will be critical that all people are made aware of the advantages of using briquettes, their potential and contribution to conservation of the climate and clean cooking. It is this awareness that will drive up demand.

- i. **Produce and widely disseminate Information Education and Communication (IEC) materials on briquettes** to the wider public. This information can also be translated into local languages
- ii. Conduct outreaches that show-case (with demonstrations) in the local communities practically on proper use and production domestically of Briquettes
- iii. Use radio, TV and other print media to obtain feedback and work on it to scale up use of briquettes.

3.5.4 To support scaled up briquettes production as a panacea to bringing down the price

- i. Promotion through initiatives such as direct support for production (Free of service).
- ii. Invest in procurement or local manufacture of equipment that can support mass production
- iii. Promote more briquette technology with MDAs, non-government organizations (NGOs), and private companies.

3.5.5 Strengthening public private partnerships in briquettes production and marketing

- i. Give out the work of production and sales to a private entity which can in turn share a proportion of proceeds for awareness creation and other mobilization efforts to KRC (for instance, UGX 100 shillings from proceeds per kilo to KRC)
- ii. Work with partners to introduce better briquette entrepreneurial models such as tailored vender support (around market days), demonstration on key events and expos and linking producers to large scale users like hospitals, schools, poultry farmers and prisons within and around the local community which will create economic gains from targeted clients.

3.5.6 Integrate and mainstream cross-cutting issues in wider briquettes production (including women, children, persons with disability, reducing gender-based violence, saving the environment from degradation as well as contributing to reduction of HIV/AIDS)

- i. Provide low interest credit to support vulnerable groups to take up briquette production to support their livelihoods.

- ii. Use production centers to dissemination information on GBV, HIV/AIDS and rights of PWDs.

3.6 Pricing and cost Implications

Pricing modelling is based on four fundamentals as discussed below:

i. Cost of production

Within the Kyangwali refugee settlement, the production has faced a key challenge of under-capacity of the current machine, the breakdown of machines that has attracted a high repair cost from time to time. These call for new investment in machines that can be locally resourced that can still do most of the works (some with various metal fabricators in Katwe in Kampala) that do not require to be imported from outside Uganda. This is what will drive down the cost and at the same time ensure sustainability of quality briquettes production.

There are various associated costs of production at the various stages of the value chain as below.

Table 3.1 Various stages of the briquettes making process with cost imperatives

Stages of the Production value chain	Costs (UGANDA SHILLINGS)
Stage 1: Carbonization	
a) Earth pit kilns	Small scale pit method that can carbonize between 400-500 kg. in two days UGX 752,500
b) Brick and Steel Kilns	Small scale carbonize (UGS 1,050,000)
c) Large scale plans and retorts	UGX 83,000,000
Stage 2: Preparation of Feedstock	
Miller to crush these into smaller fine matter (sugarcane husks, maize cobs, coffee husks, groundnut shells, tobacco dust, sunflower hulls, rice straws and husks)	Mechanized Manual crusher (UGX 10,500,000 – UGX 49,000,000) Option of manually grinding at home used labor
Stage 3 Binding (using common binders such as cassava flour, molasses, wheat flour, fine clay or red soil)	
	Manual mixer used to crush particles with the binder UGX 378,000
Stage 4 Compacting and fine round (Use of machines or by had)	
	<ul style="list-style-type: none"> • Manual excluder (UGX 752,500) • Single manual honey comb machine (UGX 658,000) • Double honey comb machine (UGX 857,500)

Note that most of these are equipment costs (not variable costs of production)

It is also important to note that all these produce different types of briquettes as tabled below

Table 3.2 Various types of briquettes




Type of Briquette	Name
	Non-carbonized straw briquette (piston- extruded)
	Carbonized charcoal dust (roller press)
	Honey-comb briquette (hydraulic press)
	Hand-made charcoal dust briquettes

Table 3:3 Various machine types and prices per unit

Item (7 machine of each type per 333 people per district)	Price of Machine(USD)
 <p>Manual extruder Produces 9 cylindrical briquette pallets at a time</p>	215\$ -1,505\$
<p>Manual crusher This can crush about 50kgs of chur per hour</p>	170\$ -1,190\$

Item (7 machine of each type per 333 people per district)	Price of Machine(USD)
	
<p data-bbox="395 546 879 577">Single manual honey comb machine</p>  <p data-bbox="735 613 1145 748">This can be used to produce about 150 honey combs per day with an average weight of 2kg per honey comb</p>	188\$ - 1,316\$
 <p data-bbox="735 815 1145 987">Double honey comb machine This can be used to produce about 300 honey combs per day with an average weight of 1.5kg per honey comb</p>	245\$-1715\$
 <p data-bbox="735 1182 1123 1352">Manual sieving machine This helps to sieve carbonized materials so as to obtain different particals required for the mixtures</p>	108\$-756\$
 <p data-bbox="735 1391 1123 1525">Manual mixer This is used to mix the crushed particals with the binder</p>	180\$ - 1,260\$
 <p data-bbox="735 1733 1145 1839">Small scale carboniser This can carbonize about 70kg of chur per day</p>	300\$-2,100\$

Item (7 machine of each type per 333 people per district)	Price of Machine(USD)
 <p data-bbox="708 266 1169 546">Small scale pit method carboniser This can carbonize about 400 to 500kg of chur in two days</p>	215\$ - 1,505\$

ii. Price tag given to briquettes at point of sale

According to the survey the price of briquettes is UGX 1,000 per kilo compared to UGX 824 for charcoal.

iii. Price of the competing charcoal and wood options

The challenge of sustained preference for charcoal

Briquettes market characteristics	Charcoal market characteristics
Not readily available on the market	Available on markets across the country
Production expensive (Requires specialized machines to make)	Production cheaper (Largely rudimentary)
Costly at UGX 1,000 per kilo	Relatively affordable at UGX 824 a kilo
Clean energy (does not emit CO ₂)	Emits CO ₂
Cooking time (longer)	Cooking time (shorter)
No sure market (and hence requires more marketing and advertisement)	Available market

As can be seen from the table above, the charcoal provides a higher advantage point in terms of marketing than briquettes. Many would love to use briquettes but cannot access them at regular supply.

iv. Market analysis. The biggest driver of demand for briquettes is information.

Unless households' perception of briquettes improves and they are perceived as efficient at cooking (regardless of price) will the demand rise with a gradual fall in prices. Prices however will not fall alone by demand but increase scale of production and ready-availability. The competition from charcoal will continue to outstrip that of briquettes even with scale-up investments as seen in the table below. **It is important to note that while the prices for briquettes ranges between UGX 600-1000 per kilo, for strategic planning purposes, and with a base inflation currently at 6% - a prospective price for a kilo of briquettes is estimated to range on average shilling 890 per kilo (if production is incentivized and scaled up). If this does not happen it will remain at the business as usual scenario of UGX 990.5 which will remain higher than the kilo price for charcoal.**

The table below provides the market scenarios for briquettes

Items	Production and marketing cost per kilo	Unit price per kilo	Profit mark-up on a kilo
BAU Scenario (Business as Usual)			

Briquettes	UGX 990.5	UGX 1,000	UGX 9.5
Charcoal	UGX 698	UGX 824	UGX 126
Scaled-up and subsidized Briquettes production at a commercial level			
Briquettes	UGX 990.5	UGX 890.5	UGX 100
Charcoal	UGX 698	UGX 900	UGX 202

Source: KRC and contributory computations from 2019 GEF DEEP Briquettes study in Kampala

As shown in the table above, charcoal in the current scenario is still more profitable than briquettes (UGX 126 per kilo compared to only UGX 9.5 for briquettes). Even with incentives this is likely to remain the scenario with charcoal still raising UGX 202 in profit per kilo compared to only UGX 100 for briquettes.

A critical aspect that would make market narrative for briquettes is shown in the textbox below:

Typically, cooking a traditional meal for 1kg of dry beans for a household costs UGX 3,000 by charcoal (US\$ 0.86) and be extinguished. However, cooking the same meal with briquettes will cost UGX 3,800 (US\$ 1.08) but for a much shorter time and not be extinguished to cook extra foods. This is the narrative that will make the difference at household level in terms of inducing demand. This will need to be backed up by awareness door-to-door campaigns and availability of briquettes at stalls and markets the same way charcoal is.

3.7 Mapping of Key Support Institutions

S/N	Name of Institution	Area of Operation	Contact Address
1.	Green Bio Energy Limited	<ul style="list-style-type: none"> Provision of alternative cooking solution Buy waste from 100 women suppliers in Kampala who receive stable wage and technical training Partner with Living Goods, Brac and Watoto NGOs. 	Green Bio-Energy Limited Tel: MTN 0393 514 710 Airtel: 0702 069 566 Email: info@greebioenergy.org Physical Location: Plot 5 Stretcher Road Ntinda Kampala
2.	Adapt Plus Limited	<ul style="list-style-type: none"> Provide technical and innovative solutions in the areas of energy and agriculture Pioneer social enterprise in mass production of fuel briquettes and low-cost fuel efficient stoves among refugee settlements in Uganda 	Contact CEO Mr David Nkwanga Tel +256 772 625963 Email: adaptplus@gmail.com Location: Katende Kasenje Road Off Kampala Masaka Road P. O Box 29455 Wakiso Kampala
3.	Center for Energy and Efficient Business	<ul style="list-style-type: none"> Clean biomass fuel and briquettes as well as firewood and charcoal saving stoves. 	Mr. Frank Ssentongo Tel 071 2 344612 Sfrank20@gmail.com Arthur Mugwanya MD Mugarthur2002@yahoo.com +256 77 2 355 382
4.	COBSTOVE Uganda Limited	<ul style="list-style-type: none"> Purposes to enrich youth and women in exchange of skills for distribution and marketing 	Mr. Masereka AbudulKarim CEO globalconsultskampala@gmail.com +256 700 947 190

S/N	Name of Institution	Area of Operation	Contact Address
		scopes for tree-planting and renewable energy	Mrs. Nakulima Madina Maserekamadinah2@gmail.com +256772390471
5.	Bold Energy	<ul style="list-style-type: none"> Deal in Biogas, Biomass, Briquettes and Solar as well as cooking stoves 	Mr. Ronald Rwankangi CEO ronald@boldenergy.co.ug +256 77 2 302 979
6.	Bio Innovations Company Ltd	<ul style="list-style-type: none"> Availing clean renewable energy from wastes by collecting organic waste, manufacture of briquettes and biomass pellets, as well as distribution, marketing and sales 	Alex Tumukunde Director tumukundalex@yahoo.com Tel 0779 125508 Or Secretary birikanos@gmail.com Tel 077 6 11 08 47
7.	Awamu Biogas Energy Limited	<ul style="list-style-type: none"> Development of Top-Lit Updraft gasifier stoves that utilize renewable energy from dry organic waste products, while increasing agricultural productivity and sustainability through environmentally responsible production of fuels 	Contact: Mr. Nolbert Muhumuza muhumuza@gmail.com Tel +256776346724
8	Econ Group	<ul style="list-style-type: none"> Aim to reduce de-forestation by promoting the use of reusable stone stoves (eco-stoves) 	Contact: Mrs Rose Twine rose@eco-stovesystem.com Tel 0702 920729 Other contact Mr Boney Kayumbak jmusiriza@gmail.com Tel 0706187028
9	Makerere University - The Urban Action Lab The KNOW Kampala Project	<ul style="list-style-type: none"> Knowledge in Action for Urban Equity Project provides capacity building through peer-to-peer learning and exchanges across the entire briquettes value chain. Provided in 2021, seed grants for briquettes 	Contact GBE Green Bio-Energy Limited Tel: MTN 0393 514 710 Airtel: 0702 069 566 Email: info@greebioenergy.org Physical Location: Plot 5 Stretcher Road Ntinda Kampala

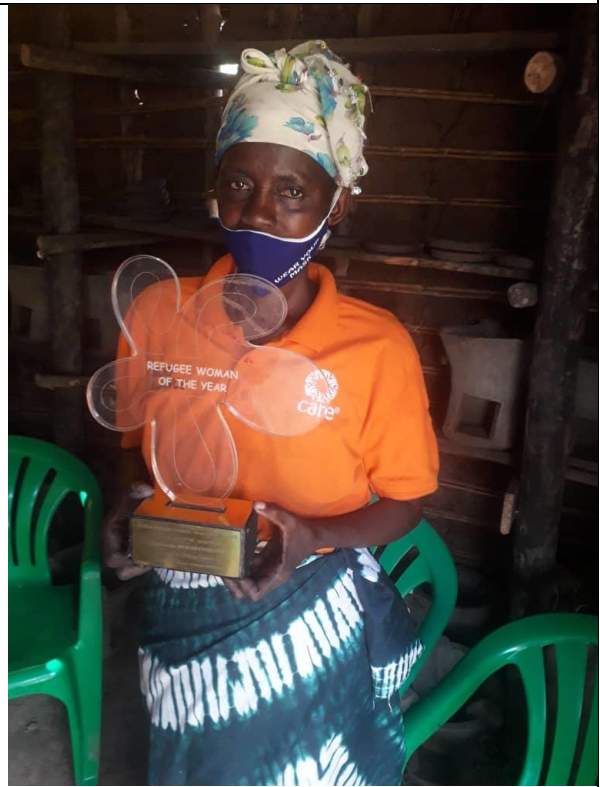
INSTITUTION IN KIKUUBE DISTRICT

Name of Institution	Name of the contact person	District	Type of fuel used for Cooking	Are you currently using briquettes	Do you find briquettes easier to use compared to charcoal
Kikuube HC IV	Dr Kukiriza Alex - Facility In-charge	Kikuube	Firewood	No	No
Wambabya HC III	Christine Ajuna -Facility In-charge	Kikuube	Firewood	No	No difference
St. Patrick's Guest House		Kikuube	Firewood and Chacoal	No	Not Sure
Kyangwali HC IV	Dr Timbigamba Justus- Facility In charge	Kikuube	Firewood	No	Not Sure
Cobrus nursery and primary school	JohnBosco Amanyaruhanga - Deputy administration	Kikuube	Firewood	No	Not Sure
Rwenyawawa Health center III	Paul Kayebire	Kikuube	Firewood	No	Not Sure
Daughter s restaurant	Margret Nseka	Kikuube	Firewood	No	Not Sure
Abwooli restaurant	Atuhairwe Kedres	Kikuube	Firewood	No	Yes
Kyangwali Secondary school	Nsingoma Patrick	Kikuube	Firewood	No	Not Sure
Yala kashano restaurant	Ochaya Benard- Manager	Kikuube	Firewood	No	Not Sure
Auncles / Defeels restaurant	Manager	Kikuube	Charcoal	No	Not Sure
Lucy Bisereko HC III	Mutesi Maureen- Facility Incharge	Kikuube	Firewood	No	Not Sure
Betty's restaurant	Betty Kiden- Manager	Kyangwali Refugee Settlement	Charcoal	No	Yes

Name of Institution	Name of the contact person	District	Type of fuel used for Cooking	Are you currently using briquettes	Do you find briquettes easier to use compared to charcoal
Multi Force restaurant		Kikuube	Charcoal	No	Yes
Act faith restaurant		Kikuube	Charcoal	No	Not sure

ANNEX 1: Field Photos





ANNEX 2A: QUESTIONNAIRE

Annex 2A: Individual Survey Questionnaire

HOUSEHOLD QUESTIONNAIRE

Consultancy Services to Conducting a Briquettes Market Study And Development Of Marketing Strategy For Promoting Solar Powered Energy Efficient Stoves In Kyangwali Refugee Settlement (PROSPERS) Project

Greetings,

My name is I am part of the team from Pazel Conroy Consulting Ltd, that has been contracted by KRC to conduct a Briquettes Market study and Development of Marketing strategy for promoting Solar Powered Energy Efficient Stoves in Kyangwali Refugee Settlement (PROSPERS) Project

The study seeks to understand current briquettes market and develop a market strategy for promoting solar powered energy efficient stoves in kyangwali refugee settlement (PROSPERS) Project. The overall objective of the study is to To generate credible market information/data that will support the development of the Briquettes Marketing Strategy to guide the marketing function of the briquette producing groups under the PROSPERS' project.

The findings of the study will be used in the project to strategize, develop and offer better support to target communities. You have been selected as a respondent in this research. We therefore request you to allow us ask you some questions which you can answer as you feel. The information you will give will be treated confidentially and will be anonymously used for purposes of writing the research report and will not be used for any other purpose. Thank you very much in advance for your assistance.

Do you accept to be part of this interview?

1. Yes 2. No

A- BACKGROUND INFORMATION

District	
Settlement	
Zone	
Cluster	
Nationality status	1. Refugee 2. National
If refugee in above, what is your country of birth?	1. Democratic Republic of Congo 2. Rwanda 3. Other.....
Date:	Date ____ mm ____/2021
Interviewer Name	
Supervisor Name	
Name of trading Centre / hub	

B- DEMOGRAPHIC CHARACTERISTICS

Q101	Gender of the respondent	1. Male 2. Female
Q102	How old are you (<i>Age in complete years</i>)? If don't know probe for year of birth and calculate	
Q103	What is the highest level of education you have attained?	1. No formal education 2. Primary education 3. Secondary education 4. Vocational education 5. University 6. Other (Specify): _____
Q104	What is your current marital status?	1. Single/ never married 2. Married 3. Cohabiting 4. Separated 5. Divorced 6. Widowed

QUESTIONS		ANSWERS
Q201	Have you heard about briquettes before?	1. Yes 2. No
Q201b	If yes, what have you heard about them?	
Q202	Have you used briquettes before?	1. Yes 2. No
Q203	If yes, what has been your experience using briquette?	
Q204	For how long have you been using briquettes?	
Q205	If no, are you willing to use briquettes?	1. Yes 2. No If no, why?
Q206	How many people do you know are using Briquettes	
Q207	What are their experience using briquettes?	1. Good 2. Bad 3. Others
Q208	Are briquettes available on market?	1. Yes 2. No If yes, what is the capacity?
Q209	How many people are producing briquettes and What capacity can they produce?	
Q210	What are the policies available supporting the briquettes use and production?	
Q211	What factors are limiting the production of briquettes?	

Q212	What is the cost of producing briquettes?	
Q213	What are the other sources of energy used in kyangwali settlement and its host communities	

END

Annex 2B: Key Informant Interview and Focus Group Discussion Guides

KEY INFORMANT INTERVIEW GUIDE

Consultancy Services to Conducting a Briquettes Market Study And Development Of Marketing Strategy For Promoting Solar Powered Energy Efficient Stoves In Kyangwali Refugee Settlement (PROSPERS) Project

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My name is I am part of the team from Pazel Conroy Consulting Ltd, that has been contracted by KRC to conduct a Briquettes Market study and Development of Marketing strategy for promoting Solar Powered Energy Efficient Stoves in Kyangwali Refugee Settlement (PROSPERS) Project

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You have been selected as a respondent in this research. We therefore request you to allow us ask you some questions which you can answer as you feel. The information you will give will be treated confidentially and will be anonymously used for purposes of writing the research report and will not be used for any other purpose. Thank you very much in advance for your assistance.

Do you accept to be part of this interview?

1. Yes 2. No

Location	
Contact	
Role/ Title	
Nationality	

LOCAL LEADERS/KRC

1. What are the policies available for use and production of briquettes in kyangwali settlement and its host communities?	
2. Who have you helped the people producing briquettes in kyangwali settlement and its host	

communities so as to increase their production?	
3. How many people have been enrolled in production of briquettes in kyangwali settlement and its host communities?	
4. What are the other sources of energy used by refugees in kyangwali settlement and its host communities?	
5. What is the current market status for the briquettes in kyangwali settlement and its host communities?	

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