

# **Marketing of Factory By-Products in the Lake George Area**

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## **1. The Survey**

Small samples from a number of distinct groups with interests in the trade were surveyed to determine the impact of by-products in the area. The groups fall into three distinct categories:

- (1) Opinion formers and administrators (Fisheries Officers and Politicians);
- (2) Interviewees at the retail markets (Market tender holders/agents, Frame traders, Local fish traders, Local traders in competing products, and Consumers); and
- (3) Interviewees at landing sites (Boatowners and Landing site fishmongers).

In the first category three District Fisheries Officers completed questionnaires between 12 and 27 February 2003. They interviewed five politicians on 19 and 21 February. The names of these interviewees are recorded in Tables 1 and 2.

**Table 1. District Fisheries Officers Interviewed**

<b>Name</b>	<b>District</b>
Kaana-Mbaga	Kasese
Luranga M.S.	Bushenyi
Turnival Bright	Kanwenge

**Table 2. District Politicians Interviewed.**

<b>Name</b>	<b>Position</b>	<b>District</b>
Florence Beyunga	Secretary Production LC5	Kanwenga
Tom Rwabuligi	Chairman Production Committee	Kanwenga
Tiller John	Secretary production	Kasese
Kule Joseph	Vice Chair LC5	Kasese
Musema	Speaker, District Council	Kasese

In the remaining two categories (see Tables 3, 4 and 5) interviewing took place between 13 February and 2 March 2003. These interviews were conducted by the DFOs and were all anonymous.

**Table 3. Location of Markets Surveyed**

Market	Parish	Sub-county	County
<b>Bushenyi District:</b>			
Katerera	Katerera	Katerera	Bunyaruguru
Nakasaru		Ryeru	Bunyaruguru
Nyakabirizi	Ward 1	Bushenyi Ishaka Town	Igara
<b>Kamwenga District:</b>			
Kabuga	Kakinga	Kamwenge	Kibale
Kanara	Kanara	Nyabbani	Kitagwenga
Kyendangara	Kitonze	Mahyoro	Kitagwenga
Railway Station	Kamwenge	Kamwenge Town	Kibale?
<b>Kasese District:</b>			
Kikorongo	Kahokya	Lake Katwe	Busongora
Lhubimha	Mpondive	Kananibi	?
Maliba	Maliba	Maliba	Busongora
Nyallasangra	Nyallasangra	Kasese Town	Busongora?
Sauliyallo	Nyallalingo 2	Kasese Town	Busongora?

**Table 4. Number of Interviews Conducted**

Market	Market tender holders/ agents	Frame traders	Local fish traders	Local trader in competing products	Consumers
<b>Bushenyi District</b>					
Katerera	1	1	1	1	1
Nakasaru	1	1	1	1	1
Nyakabirizi	1	1	1	1	1
<b>Kamwenga District</b>					
Kabuga	1	1	3	1	3
Kanara	1	1	1		2
Kyendangara	1	1			1
Railway Station		1		1	1
<b>Kasese District</b>					
Kikorongo	1	1	1	1	1
Lhubimha	2				
Maliba	1	1	1	1	1
Nyallasangra	1	1	1	1	1
Sauliyallo	1	1	1	1	1
<b>Totals</b>	<b>12</b>	<b>11</b>	<b>11</b>	<b>9</b>	<b>14</b>

**Table 5. Location of Landing Sites Surveyed and number of Interviews Conducted.**

<b>Landing Site</b>	<b>Parish</b>	<b>Sub-county</b>	<b>County</b>	<b>Boat-owner</b>	<b>Fish-monger</b>
<b>Bushenyi District</b>					
Katunguru	Katunguru	Katunguru	Bunyaruguru	1	1
Kisenyi	Kisenyi	Katunguru	Bunyaruguru	1	1
<b>Kamwenge District</b>					
Mahyoro	Mahyoro	Mahyoro	Kitagwenda	2	3
<b>Kasese District</b>					
Hamunungu	Hamunungu	Lake Katwe	Busongora	1	1
Katwe	Rwenjuba	Katwe/Kabatrio Town	Busongora	1	1
<b>Totals</b>				<b>6</b>	<b>7</b>

## **2. Availability of By-products, Price, Customer Profile**

### **2.1. Markets where by-products and local fish sold**

In Kasese district the DFO reported that frames were on sale in markets in Kikorongo, Kyarumba, Kinyamaselle, Kiowamba, Kyabarungwa, Kasese town, as well as the markets surveyed and others. In Bushenyi district they were available at markets at Kabwoke, Nyakairizi, Kizinda, Nakasaru, Nilekeye and Katerera. In Kamwenge district they are at markets at Kabuga, Kanwenge town, Kanara, Kichwaramba, Kyendangara and Rwenjaza.

Both by-products and local fish were sold at all of the markets except Lhubimha in Kasese District. The by-products on sale in the area include fresh frames and dried frames, heads, skins and offcuts. Lake George fish includes tilapia, clarius, protopterus and semutundu (bagrus).

Two of the markets visited are held daily (Nakasaru, Nyallasangra), two twice a week (Kikorongo, Maliba) and the rest once a week (Nyakabirizi, Falenga, Kanara, Kyendangara, Katerera). Some of the daily markets are supplemented with special markets one day a week. Generally by-products are sold every day the market operates. But at Nyallasangra by-products are sold mainly on Mondays and Fridays, coinciding with Kikorongo market where by-products from the factories are sold. At Nakasaru by-products are only available on the day the extended market operates.

### **2.2. Distribution and Marketing System**

The recollections of the interviewees about recent trends in the levels of sales in the markets are not consistent. But many estimates suggest that the quantities of by-products sold had declined in the last two or three years. Individual traders in by-products - perhaps the category of interviewee with the best overall picture of the market - interviewed at Kabuga, Kanara, Railway Station and Sauliyallo markets estimated that 2002 sales were about half of the 1999 level. Respondents at other markets painted a different picture. In contrast local retailers traced doubling or more in sales at Nyallasanga and Sauliyallo - but their replies may reflect their own

business only. Similarly wholesalers in local fish estimated substantial growth over the period at Kikongoro and Sauliyallo markets - but again their view of the by-product trade may be partial. The explanation of one of the frame wholesale traders is persuasive: at the start a lot of the by-products came to Kasese (the interview was at Sauliyallo market) but the amount declined as interest increased elsewhere.

### **2.3. Price of By-products and the Social Characteristics of Consumers**

As an indicator of economic status data were collected on the ownership of selected assets. 10 of the interviewees had their own temporary houses, five their own permanent houses, and one a rented temporary house (two households had more than one house). Nine households owned a bicycle, but none a motor cycle or car. All of the households owned chickens, 12 owned a goat, ten land and four a cow. The data are not sufficient to distinguish definitively between the wealth of consumer and non-consumers. However, one of the customers who did not consume by-products may have been slightly wealthier than the average - the household owned both permanent and temporary houses, and was one of the four cow-owning households. While the second non-consumer owned a cow they owned only a temporary house.

### **2.4. Local Fish Supplies**

There were fewer interviews conducted at the landing sites and fewer comments were volunteered - which may indicate that sales of factory by-products are not perceived as of central importance. Indeed of the six boat owners three were aware and three not aware that Nile perch frame aware being sold in the area. They were not seen as being a threat - the quantities were too small.

Four of the seven landing site traders were aware of the sales. Most reported that the by-product trade had had little impact on their fresh fish trade. One, at Hammungungu, reported that his activities had been adversely affected and his prices, sales and income reduced. His turnover has been reduced from 200kg to 100kg because of competition from the by-products. And he thought that their sale should be stopped.