

## A) Microeconomic Developments

Issue	Market Updates
<b>Employment</b>	The number of migrant workers captured by the Immigration Department reduced by 13.5% from 4,207 migrant workers in October 2025 to 3,638 migrant workers in November 2025.
<b>Living Standards</b>	Monthly inflation for Food & Non-alcoholic Beverages registered a 0.5% decrease in November 2025, compared to the 0.4% decrease registered in October 2025. On the other hand, monthly Energy, Fuels and Utilities (EFU) inflation decreased by 0.2% in November 2025, compared to the 0.2% increase registered in October 2025. Household Final Consumption Expenditure increased by 25.1% from Ushs. 26,178 billion in Q4 FY2024/25 to Ushs. 32,748 billion in Q1 FY2025/26.
<b>Equity and Economic Inclusion</b>	The number of senior citizens benefiting from the Social Assistance Grants for Empowerment (SAGE) reduced by 7% from 320,315 senior citizens in FY2023/24 to 297,724 senior citizens in FY2024/25.
<b>Environmental Sustainability</b>	Air quality in Kampala deteriorated, with particulate matter increasing by 26.8% from 31.4µg/m <sup>3</sup> in October 2025 to 39.8µg/m <sup>3</sup> in November 2025. Noise pollution in Kampala increased by 0.57% from 64.29 decibels in October 2025 to 64.66 decibels in November 2025.
<b>Productivity</b>	Malaria prevalence reduced significantly by 47.1% from 2.27 deaths per 1,000 persons in October 2025 to 1.2 deaths per 1,000 persons in November 2025. The decrease could be attributed to the rollout of the malaria vaccine (R21/Matrix-M) earlier in 2025 and the continued high coverage of preventive measures like insecticide-treated nets.
<b>Competitiveness</b>	Monthly inflation for Liquid Energy Fuels registered a 0.2% decrease in November 2025, compared to the 0.3% decrease recorded in October 2025. This was mainly attributed to a 0.6% reduction in the price of diesel during the month of November 2025. Export earnings increased by 3.5% from Ushs 8,795 billion in Q4 FY2024/25 to Ushs 9,102 billion in Q1 FY2025/26. Furthermore, Investment, as measured by the Gross Fixed Capital Formation, reduced by 2.9% from Ushs. 11,320 billion in Q4 FY2024/25 to Ushs. 10,992 billion in Q1 FY2025/26.
<b>Markets &amp; Regulation</b>	The USE All-Share Price Index increased by 6.9% from 1,468.3 in October 2025 to 1,569.8 in November 2025. New business registrations increased by 29.7% from 3,480 new businesses in October 2025 to 4,512 in November 2025.
<b>Local Content</b>	The monthly trade deficit significantly reduced by 85.4% from US\$511.2 million in September 2025 to US\$74.5 million in October 2025. The decrease was mainly attributed to a massive rise in the export receipts of Gold from US\$410.99 million in September 2025 to US\$964.60 million in October 2025 and export receipts of other exports category from US\$199.66 million in September to US\$218.67 million in October 2025.

**B) Policy Response Measures:** This edition of the MIND focuses on Environmental Sustainability as a thematic area, with specific emphasis on Air Quality.

Objective	Interventions
Improved Air Quality	<p>Air pollution, primarily particulate matter (PM<sub>2.5</sub>), is one of the most serious contemporary health threats globally, causing over 7 million premature deaths annually. The 2024 World Air Quality Report ranked Uganda as the 8<sup>th</sup> most polluted country globally with particulate matter at 41µg/m. The Fourth National Development Plan (NDPIV) emphasizes the need to improve air quality by reducing the annual average air pollution level from 41µg/m<sup>3</sup> in FY2024/25 to 25µg/m<sup>3</sup> by FY2029/30. To achieve the above target and improve air quality, Government has:</p> <ol style="list-style-type: none"> <li>1. <b>Strengthened and enforced the legal and regulatory frameworks by:</b> <ol style="list-style-type: none"> <li>a) <b>Implementing the National Environment (Air Quality Standards) Regulations, 2024.</b> These regulations prohibit harmful emission from objectionable matter or obnoxious smells including smoke, gases, vapours, fumes, dust or other matter capable of being dispersed or suspended in the atmosphere. In addition, they prohibit a person from causing emissions into the air beyond permissible limits.</li> <li>b) <b>Launching the Kampala Health and Pollution Action Plan (HPAP)</b> under the Environmental Pollution Programme in Uganda (EPP-UG). This initiative aims at tackling issues related to pollution including vehicle emissions, industrial activities, domestic and municipal waste, medical and mining byproducts and construction debris. For example, Government is enforcing the EURO 4/IV vehicle emissions standard of the East Africa Community that prohibits importation of vehicles that are more than 15 years old, helping to reduce urban air pollution.</li> <li>c) <b>Implementing the National Energy Policy 2023.</b> Among the objectives of the Policy, is to promote the use of clean energy such as the Liquefied Petroleum Gas in order to reduce reliance on charcoal and its associated environmental and health impacts. In 2024, Government signed a landmark Supply and Purchase Agreement with Global Gases Group to establish a Liquefied Petroleum Gas storage facility and cylinder manufacturing and filling plants in Luzira. The agreement will see Global Gases Group produce 500,000 LPG cylinders annually for Ugandan consumers in sizes of 3kg, 6kg and 12kg.</li> </ol> </li> <li>2. <b>Strengthened air quality monitoring and assessment in order to implement target interventions.</b> Government has established low-cost monitoring stations by AirQo in urban areas, including high-resolution systems that have been deployed in Kampala, Jinja, Fort Portal, Kira, and Kabale to monitor air quality. As of December 2024, Uganda had over 171 air quality monitoring sites across all its regions. Furthermore, the National Environment Management Authority (NEMA) is working with Kampala Capital City Authority (KCCA) and Makerere University AirQo to establish a network of sensors in various parts of the country, to get more accurate records for the whole country.</li> <li>3. <b>Facilitated education and awareness campaigns related to air quality.</b> These air quality awareness campaigns take place annually during the first week of May, demonstrating collaborative efforts to improve air quality between Government, Development Partners, Academia and the Public.</li> </ol>

**C) Microeconomic Outlook:** Air pollution and climate change in Uganda pose a micro-economic challenge since rapid urbanization, transport emissions and household energy choices increase health expenditures and reduce individual productivity and welfare.

# MICROECONOMIC ISSUES IN THE NEWS & REPORTS

**NOVEMBER  
2025**

## AIR QUALITY AND BUSOGA ZONAL SUMMARY

<b>Air Quality in Uganda</b>	<p><b>The National State of the Environment Report 2024 indicated that:</b></p> <ul style="list-style-type: none"> <li>a) As of 2024, Uganda had a total of 171 air quality monitoring sites across all its regions comprising of 107 sites in the Central, 11 sites in the Northern, 25 sites in the Eastern and 28 in the Western Region.</li> <li>b) Mortality in Kampala attributed to air pollution over a four-year period (2018 to 2021) is estimated to be 7,257 deaths.</li> <li>c) During the COVID-19 mobility restrictions, air quality in the Greater Kampala improved by about 50%. The improvement was accompanied by Uganda's adoption of the EURO 4/IV vehicle emissions standards of the East Africa Community that prohibits importation of vehicles that are more than 15 years old.</li> <li>d) Air pollution in Uganda is mainly caused by sectors such as transport, energy, waste management and industry.</li> <li>e) The transport sector is responsible for more than 24% of air pollution in Kampala. In addition, waste and residential combustion is responsible for about 30% of air pollution in greater Kampala.</li> </ul>
<b>Busoga Sub-Region:</b>  Economy, Public Services, Industry and Air Quality	<p><b>Busoga sub-region</b> is located in the Eastern part of Uganda, with a population size of 4.3 million people (9.4% of the national population in 2024). On average, households in the sub-region comprise of 4.4 persons. About 38% of the population in the sub-region is in the subsistence economy, above the national average of 33% in 2024.</p> <ol style="list-style-type: none"> <li>1. <b>State of the Economy:</b> The income poverty rate in the sub-region reduced from 29.4% in 2019/20 to 18.9% in 2023/24. Similarly, income inequality reduced from 0.353 in 2019/20 to 0.328 in 2023/24. Furthermore, unemployment in the sub-region stands at 17.9%, above the national average of 12.6%.</li> <li>2. <b>Public Spending and Service Delivery:</b> The sub-region has Magistrate Courts located in Jinja, Bugiri, Buyende, Kaliro, Mayuge, Namayingo, and Namutumba and two High Court Circuits in Jinja and Iganga. There are two Ministerial Zonal Offices located in Jinja for Land and Immigration services. Each district in the sub-region has a NIRA office. The sub-region has two URA offices located in Jinja and Iganga districts.</li> <li>3. <b>Trade, Industry and Local Economic Development:</b> The leading value chain in the sub-region is sugar cane, with processing plants such as Kakira sugar works, Mayuge sugar works, Kamuli sugar works, Kaliro sugar works and Bugiri sugar works. There is a vehicle manufacturing plant (Kiira Motors Corporation) located in Jinja with installed capacity of producing 5,000 vehicles annually. The sub-region has one Industrial and Business Park located in Jinja.</li> <li>4. <b>Air Quality in Busoga sub-region:</b> The sub-region has one Air Quality monitoring site located in Jinja. Air quality in Jinja City improved, with particulate matter dropping by 12.5% from 24<math>\mu\text{g}/\text{m}^3</math> in October 2025 to 21<math>\mu\text{g}/\text{m}^3</math> in November 2025 (AQI Real time Air Quality Index 2025). Furthermore, 0.4% (4,037 households) and 2.5% (24,201 households) of the households in the sub-region use Liquefied Petroleum Gas for cooking and Liquefied Petroleum Gas lamps for lighting respectively, signifying improved indoor air quality.</li> </ol>

DASHBOARD: NOVEMBER 2025

Version 1.0

Issues	Indicators		Frequency	Status		Issues	Indicators		Frequency	Status			
Employment	Jobs	Formal Sector <sup>1</sup>	Monthly (-1)	909,845 (0%)		Productivity	Literacy Rate (Grade 6) <sup>11</sup>		Yearly	42.7% (0%)			
		Informal Sector	Yearly (-1)	8,796,480			Numeracy Rate (Grade 6)		Yearly	58% (0%)			
		Migrant Workers	Monthly	3,638 (13.5%)	▼		Morbidity Rate (Malaria Incidence) <sup>12</sup>		Monthly	1.2 (-47.1%)	▼		
	Incomes	Per-capita GDP (US\$): 2024/25	Yearly	1,360 (9.5%)	▲		PIP Budget Absorption (GoU, IFMS %) <sup>13</sup>	Yearly	83.3% (-8.5%)	▼			
						Income Poverty (%)					Yearly	16.1% (20.6%)	▼
		Utilities (Retail Tariff Rates)	Water (M³)	Quarterly	4,307 (1.96%)	▲	Competitiveness	Power Tariff (Ushs per Unit)	Medium	Quarterly	355.1(0%)		
Power/Domestic	Quarterly		756.2(0%)		Large	300.4(0%)							
Data (Ushs, 1GB)	Monthly		2,036 (0%)		Extra Large	203.6(0%)							
Living Standards	Household Expenditure (HFCE), Ushs Bn		Quarterly	32,748 (25.1%)	▲	Av. Freight Costs (US\$, Mom-Kla, 40ft)		Monthly	3,500				
	Healthcare Expenditure (HH, Ushs)		Yearly (-2)	32,000 (113.3%)	▲	Commercial Case Backlog <sup>14</sup>		Yearly (-1)	1,645 (0%)				
	Food Inflation (%)		Monthly	-0.5 (2.9)	▼	Fuel Prices (Liquid Energy Fuel Inflation) <sup>15</sup>		Monthly	-0.2%	▼			
	EFU <sup>4</sup> Inflation (%)		Monthly	-0.2 (0.6)	▼	Customs Clearance (Hours)		Monthly	5.13 (0%)				
	Residential Property Price Index (RPPI) for GKMA		Quarterly	115.76 (2.9%)		Transit Times (Mom-Kla, Days)		Monthly	4.8 (0%)				
	Crime Rate (per 100,000):2024		Yearly	476 (-5%)	▼	Investment Registration (Days)		Yearly	2				
	Private Pension: Active Members		Yearly	733,588 (0%)		Export Growth		Quarterly	3.5%	▲			
	Private Pension: Registered Members		Yearly	2,451,422 (0%)		Electricity Connection (Days)		Monthly	28 (0%)				
	Public Pension (Beneficiaries)		Yearly	382,492 (0%)		Water Connection (Days)		Monthly	3 (0%)				
Equity and Economic Inclusion	SAGE (Beneficiaries)		Yearly	297,724 (-7%)	▼	Investment Growth (GFCF)		Quarterly	-2.9%	▼			
	Agent Banking (Volume of Transactions, Mn)		Yearly	12.5 (50.5%)	▲	Communication Rates	Voice (Ushs Per Sec)	Quarterly	0.45 (4.3%)	▼			
					Data <sup>16</sup> (Unlimited)		Monthly	550,000(0%)					
	Environmental Sustainability	Water Quality (PM <sub>2.5</sub> ) <sup>5</sup>		Quarterly	Low, 20.54 (0%)		IMF Primary Commodity Price Index		Monthly	166.3 (0%)			
		Air Quality (PM <sub>2.5</sub> ) <sup>6</sup>		Monthly	39.8µg/m³ (26.8%)	▲	Average Monthly Net Salary (After Tax)		Yearly	628,611			
Noise Pollution (Decibels, Kampala)		Monthly	High, 64.66 (0.57%)	▲	Retail Sales/EFRIS <sup>17</sup>		Quarterly (-1)	63% (-25%)					
Seasonal Changes in Rainfall		Monthly	Above-Normal		USE All Share Price Index		Monthly	1,569.8 (6.9%)	▲				
Natural Disaster Incidences <sup>7</sup>		Monthly	120,936		New Business Registrations		Monthly	4,512 (29.7%)	▲				
					Hotel Occupancy Rate (Kla)		Yearly	53.2% (13.4%)	▲				

\*Unless indicated all quarterly figures are for Q1, FY2025/26.<sup>1</sup> Active PAYE Register Jobs | <sup>2</sup>Labour Intensive Public Works | <sup>3</sup> Average household expenditure on Primary education | <sup>4</sup>Energy, Fuel and Utilities | <sup>5</sup>Particulate Matter (August 2025) | <sup>6</sup> 0-50 is good | <sup>7</sup> Total number of individuals affected by Natural Hazards | <sup>11</sup> Persons aged 10 years and above | <sup>12</sup> Cases per 1,000 population | <sup>13</sup> Cumulative Absorption in FY2023/24 | <sup>14</sup> June 2024 | <sup>15</sup> Percentage Average change | <sup>16</sup> Average monthly price of data bundles for MTN (170SGB) and Smile (150GB) | <sup>17</sup> Electronic Fiscal Receipting and Invoicing System | <sup>18</sup> Made in Uganda (MUG) | <sup>19</sup> By Value.