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# Policy Brief

## State of the Wildlife Economy in Uganda

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### Key messages:

- Uganda is endowed with a great diversity of animal and plant species which forms the foundation of the wildlife economy
- Degradation and the loss of natural resources is, however, a threat to biodiversity and the sustainability of the wildlife economy
- Uganda has an extensive regulatory framework and numerous institutions involved in the wildlife economy: it is important to ensure collaboration and cooperation to manage any overlapping mandates or conflicting policies
- Although there was a large amount of data on the wildlife economy in Uganda, most of it was at a site-level and there was little national level data, with many gaps especially in terms of forest products
- Ecotourism is well-established in Uganda and contributes extensively to the economy, but there is a need to diversify the tourism product and services and establish better infrastructure (roads, airports, etc.) to accommodate this
- A variety of forest products are widely used in Uganda for subsistence and livelihoods. A large amount of this is in the informal economy and, therefore, not accounted for in national statistics or considered in policy-making
- Fisheries are a key sector in Uganda: in terms of livelihoods, subsistence and exports. Management of resources in terms of over-fishing, illegal, unregulated and unreported fishing needs to be a priority to ensure the sustainability of this sector
- Uganda has potential in terms of the carbon market and already has numerous REDD+ projects

### The asset base of the wildlife economy in Uganda

Uganda is endowed with a great diversity of animal and plant species, which form the foundation of the economy (NEMA, 2019a). It was estimated by Moyini et al. (2002 in NEMA, 2019a) that the **gross returns to the national economy from biodiversity alone were as high as USD 63.9 billion** and although Uganda occupies only 2% of the world's area, with a recorded 18,783 species of fauna and flora (NEMA, 2009), **the country ranks among the top ten most biodiverse countries in the world** (CBD, undated).

Uganda is situated in the Great Lakes region and covers a total surface area of 243,145km<sup>2</sup>, of which 16% is terrestrial protected areas, comprising **10 national parks, 506 central forest reserves, 191 local forest reserves, 11 wildlife sanctuaries, 12 wildlife reserves and 5 community wildlife management areas** (pers. comm. G. Owoyesigire, August 2021; UNEP-WCMC, 2021; UWA 2018). The Uganda Wildlife Authority (UWA) is mandated to manage the protected area estate. Uganda hosts rich biodiversity, including 53.9% of the world's remaining mountain gorilla (*Gorilla beringei beringei*) populations; 50% of Africa's bird species; 39% of Africa's mammals; 19% of Africa's amphibian species, 14% of Africa's reptile species; 1,249 recorded butterfly species and 600 species of fish (NEMA, 2019a). **Most wildlife is found inside protected areas**, but the historical loss of wildlife species in the country has been considerable and the negative trends appear to be continuing for some species (UWA, 2018). Poaching and illegal over-hunting have in the past, contributed to the loss of the country species richness (UWA, 2018). **The main threats to wildlife conservation and biodiversity in Uganda** are poaching, habitat fragmentation, degradation and loss, charcoal and firewood collection, climate change, invasive species, parasites and diseases, excessive harvesting of fauna and flora, plastic waste and pollution of water bodies and human-wildlife conflict (NEMA, 2019a; Rossi, 2018; UWA, 2018). **The underlying causes of these threats** include population growth, weak governance, limited opportunities for off-farm employment, poverty, lack of awareness and insecurity of land tenure (Anon, 2015a in Rossi, 2018).

### Socio-economic context

Despite huge improvements over the years Uganda remains one of the poorest nations in the world. The **2020 estimate for the total population in Uganda is 41.1 million** (51% female: 49% male) (UBOS, 2021b), with a **population density (2018) of 213.09 people per km<sup>2</sup>** (World Bank, 2021a). Creating jobs is key to economic growth in Uganda: unlocking and diversifying the wildlife economy has a key role to play here. Uganda is ranked 142 out of 180 in terms of the **Perception of Corruption Index**, with a score of 27, where 0 is highly corrupt and 100 is very clean (Transparency International, 2020). The average regional score for sub-Saharan Africa since 2018 is 32/100 (Transparency International, 2020).

### Regulatory framework and institutional support

At a national level, Uganda has **extensive legislation relating to the regulation of the wildlife economy, as well as a clear structure of wildlife use rights.**

Uganda has numerous institutions engaged in managing different aspects of the wildlife economy, at a national and local level as well as academic institutions and NGOs. The diversity of institutions, many with overlapping mandates, increases the complexity of managing the wildlife economy. It is **critical that overlapping mandates and conflicting policies, where applicable, are managed in order to streamline processes in unlocking the potential of the wildlife economy in Uganda and attracting greater investment in it.**



# Policy Brief

## State of the Wildlife Economy in Uganda

### Key wildlife economy activity statistics

#### Wildlife trade

- Legal wildlife trade in Uganda is largely restricted to live birds, reptiles and amphibians
- There is also legal (and illegal) trade in fauna, for example *Prunus africana*, *Dalbergia melanxylon* and *Osyris lanceolata*
- Value of regulated wildlife trade is estimated at USD 3 million per year
- Illegal trade running parallel to legal trade, with Uganda playing a key role as a conduit in the illegal wildlife trade
- Future opportunities for regulated wildlife trade lie in diversification into other commodities

#### Forest products

- Many NTFPs are collected, traded and consumed outside of the cash economy and, therefore, not captured in national statistics
- Total contribution of forests to local people's livelihoods at the national level was calculated to be USD 190 million
- Total economic value including all marketable and non-marketable values of Uganda's forests is approximately UGX 593.24 billion (USD 168 million), approximately 5.2% in GDP terms
- Little cultivation of wild plants for commercial purposes
- Income from forest products is more important than income from livestock and employment/trade combined
- Resources worth UGX 556,955,900 (approx. USD 156,500) were shared with the communities neighbouring the protected areas in 2018
- Ugandan beekeepers harvesting just 1% of the estimated production potential of 500,000 tonnes - estimated that there are about 2 million hives in Uganda, mostly small-scale producers

#### Carbon

- Carbon storage in Uganda is characterised by biomass and soil organic carbon
- As of 2016, ECOTRUST: Trees of Global Benefit (TGB) commanded about 1.8% of the voluntary carbon market share, with 1,321.85 hectares of farmland for 1,533 farmers yielding an equivalent of 1 million tonnes of carbon worth USD 6 million
- 8 million hectares in terms of landscape restoration opportunities
- Net carbon gain estimated from PAs suggest that PAs are an effective policy tool to reduce carbon emissions

#### Ecotourism

- Private sector plays a significant role in the development and management of the tourism sector
- In 2019, leisure tourists had the highest value added, highest value of tourism exports and the highest value added as a percentage of GDP
- 1 USD of tourist exports created between USD 0.9 (direct + indirect effects) and USD 2.5 (direct + indirect + induced effects) of value added
- Visitation to national parks and wildlife reserves had been steadily increasing since 2014
- Gorilla permit sales earned approx. USD 26 million in FY 2018/19
- A total of approximately USD 10 million has been shared with local communities through the Tourism Sharing Scheme since 2005.

#### Hunting

- Hunting generated over USD 700,000 in 2019
- Hunting revenues are shared between partners, which include the private sector and communities, in line with the collaborative agreements
- There is a large amount of unregulated and illegal bushmeat hunting in Uganda

#### Fishing

- Fisheries in Uganda are critical for local livelihoods and food security, as well as being an important export
- The fisheries sector in Uganda contributes to about 2.5% of GDP and supplies 50% of the animal protein consumed in the country
- The sector supports the livelihoods of approx. 5.3 million people
- Fish and fish products have consistently (from 2014-2018) scored second to coffee with respect to Uganda's formal exports by value
- 80% of fishers are categorised as 'artisanal'
- Uganda is the largest aquaculture producer in sub-Saharan Africa after Nigeria
- On Lake Victoria alone, there are currently (2018) 14,000 fish farmers with a total of 30,000 ponds, as well as 2,135 cages, employing 24,160 people
- Uganda earned USD 171.5 million from the export of fish & fish products in 2018



# Policy Brief

## State of the Wildlife Economy in Uganda



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### Key challenges to unlocking the wildlife economy in Uganda

#### Lack of consistent, comparable data over time

It is essential that the value of the wildlife economy to local and national economies in terms of revenues and employment is understood to ensure that policy-makers and those allocating budgets are fully aware of its value.

#### Policy divergency

There is a need to ensure that policies to manage the wildlife economy are aligned to promote and encourage investment in the wildlife economy and to improve the ease of doing business in Uganda. There are still gaps in policy, despite an extensive regulatory framework, which provide incentives for illegalities in forest products as well as in the parks, for example through the procurement of illegal timber which is cheaper than certified, legal timber – this needs to be rectified.

#### Degradation of natural resources

The degradation of natural resources, as well as extinction of species (such as rhino), declining populations (such as lion) and invasive species, all impact on the asset base of the wildlife economy and, therefore, on its sustainability.

#### Poor budget for natural resources management (NRM)

NRM is usually not, in comparison to many other sectors, well considered in terms of national budget allocations. This is due in part to a lack of understanding by politicians and other decision-makers as to the value that wildlife provides to local and national economies (see the first challenge listed above).

#### Poaching and other illegal use

Illegal, unregulated and unreported activities

in the wildlife economy all impact on sustainability of resources and also undermine the ability of the wildlife economy to contribute positively to local and national economies.

#### Population pressure

The fast growing population is putting pressure on resources, especially land which is limited. This creates further competition between people and wildlife and leads to increased human-wildlife conflict as well as reduced habitat for wildlife. The lack of land and opportunities also results in conflict within communities.

#### Poverty levels

High poverty levels in Uganda impact on conservation as many people rely on natural resources for livelihoods and subsistence, and there is also competition over land, as mentioned above.

#### Human-wildlife conflict

Human-wildlife conflict is a big challenge in Uganda partly due to the increasing human population, a lack of buffers around protected areas, cultivation of crops right up to protected area boundaries and a lack of available land to expand agricultural activities and/or protected areas.

#### Climate change

The impacts of climate change on natural resources (wildlife), landscapes and people are already having an impact on the wildlife economy and this threat will continue to grow if investment is not made in mitigating the impacts.

#### Poor/inadequate infrastructure to support the wildlife economy

Poor roads, a lack of airfields at a protected area level, and a lack of diverse accommodation, amongst others (including affordable accommodation for Ugandans), are all factors which impact on the wildlife economy and

unlocking its potential in Uganda.

#### Capacity building

There is a need for capacity building in terms of an understanding of the diversity of wildlife economy activities and how to engage in and develop them, as well as in terms of diversification of existing wildlife economy activities, such as tourism.

#### Marketing of wildlife economy activities and products

There is a need to improve marketing of wildlife economy activities and products.

#### Transboundary issues

Transboundary resources can be a challenge in terms of poaching, illegal use, etc. but they also provide an exciting opportunity for regional collaboration and partnerships to unlock the potential of the wildlife economy and to share learnings.

#### Land use planning

Infrastructure development in and around protected areas, such as the upgrading of roads through protected areas, increasing number of tourism lodges which use natural resources such as water, etc., could negatively impact on wildlife and therefore the wildlife economy. Land use planning needs to be done collaboratively between different public sector institutions to ensure sustainability and long-term conservation of natural resources.

#### Macro-level economic challenges

Changes in terms of inflation which affects production and value impact on the viability of some wildlife economy activities and also on production, e.g. for forest products.

# Policy Brief

## State of the Wildlife Economy in Uganda

### Key opportunities for the wildlife economy in Uganda

#### Enabling policy

The Wildlife Act and various other legislation supports the wildlife economy though as discussed in the challenges, some areas of divergence and overlap need to be looked at to allow for increased growth in the wildlife economy.

#### Resource access

UWA allows community members to use the boundaries of protected areas to set up beehives and controlled access is also allowed to collect various resources: this helps to develop a constituency for conservation.

#### Good climate and diversity

Uganda has a good and diverse climate across the country which results in a diversity of species and landscapes which provide diverse wildlife economy activity options. Uganda's location in the region in terms of the ecotones and regional vegetation results in great diversity and opportunities to diversify wildlife economy products and services.

#### Political stability

The current stable political situation is good for investor confidence.

#### Growth potential

The existing markets for different wildlife economy products (e.g. NTFPs and ecotourism) and services are not yet saturated and there are numerous new markets available which provides many opportunities for growth and development.

#### Transboundary business agreements

To-date transboundary agreements include terms related to conservation but do not include anything in terms of business and it would be useful to include these to promote greater inter-regional trade and economic activities.

#### Improvement to existing models

Revenue-sharing also offers an opportunity as Uganda has one of the best models in East Africa which enables the communities to participate in conservation and ensures that the wildlife economy thrives. Effective administration of the scheme is, however, still lacking, which is a challenge as projects implemented to-date are not always encouraging and communities don't always see results. There is an opportunity to refine the legal framework and guidelines to ensure effective and efficient administration to improve results.

#### Technology

Innovations in technology offer an opportunity to engage the youth more in the wildlife economy through media communications, etc. They also allow for diversification of wildlife economy activities through virtual tours, access to markets, etc. Additionally, technology can support the secondary production of products to add value (e.g. bee's wax or processing of fruit, etc.)

#### Competition and collaboration

The competition between countries and changes resulting from climate change both provide an opportunity for innovation, as does the emergence of economies from the COVID-19 pandemic. UWA is already innovating in terms of adding certification to management activities. There is a need now to establish creative, innovative collaborations and partnerships between the public and private sectors, as well as with communities and across countries in the region. Regional marketing of wildlife economy activities is one option, as well as ensuring ease of business between countries.

### Key policy recommendations to unlock the wildlife economy in Uganda

#### Stakeholder dialogues

A series of stakeholder dialogues for the public sector, private sector, communities, NGOs, development partners, followed by a multi-stakeholder dialogue to discuss the challenges and opportunities and how to unlock the potential of different wildlife economy products and services could provide practical recommendations for policy and practice.

#### Policy and institutional review

Given the diversity of legislation related to the wildlife economy and the number of departments/ministries involved in it, it is recommended that there is a full policy review to streamline policies and avoid overlapping policies; identify policy gaps; etc. The same should be done for institutions involved in the wildlife economy to ensure greater efficiency and to maximise impact.

#### Regional collaboration

Regional collaboration can be encouraged through workshops/dialogues between East African countries where there is a sharing of best practices and lessons learned and discussions related to opportunities to partner and promote the region, maximising on the various strengths of the different countries. An EAC Regional Wildlife Economy Strategy, developed collaboratively, could provide direction and guidance for regional collaboration and unlocking the regional as well as national and local wildlife economies.

#### Establishment of data collection and analysis protocols

Given the large data gaps and inconsistencies in terms of data across wildlife economy activities it is recommended that there is the **establishment of data collection and analysis protocols**, which allow for the collection of comparable data over time, and would also be useful in terms of data-driven decision-making. The types of data that would be important include levels of investment in wildlife and wildlife economy activities, turnover, number of jobs, wildlife stocks, hectares under conservation management, management effectiveness of these areas, size of different sectors such as ecotourism, hunting, wildlife ranching, etc.

The **establishment of national-level data collection and M&E strategies**, as well as databases and a dedicated national team (or through collaborations with NGOs and academic institutions) to collect this data would be useful for long-term monitoring and evaluation. These systems and teams should be embedded within the National Bureau of Statistics or Ministries/ Departments of M&E or within Wildlife Research Institutes to ensure sustainability. The further aggregation of national data to a regional level in the East African Community would also enable data-driven decision-making at the regional level.



# Policy Brief

## State of the Wildlife Economy in Uganda

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### Conclusion

Uganda is endowed with rich natural resources which form the basis of the wildlife economy. Degradation and illegal, unreported and unregulated activities are, however, negatively impacting on the potential to grow the wildlife economy. These need to be addressed along with improving rankings in terms of the Corruption Perception Index to improve investor confidence and unlock new and innovative wildlife economy activities.

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**Sources:** Adeleke et al., 2019 in NEMA, 2019; Barirega et al., 2012; Bush et al., 2012; CBD, undated; Chidumayo, 2013 in Tugume et al., 2019; ECOTRUST, undated; FAO, 2013; Ministry of Tourism, Wildlife and Antiquities, 2018b, 2020, 2021a, 2021b; Moyini & Masiga, undated; NEMA, 2019a, 2019b; Olupot et al., 2009; Owoyesigire, G., 2021; Rossi, 2018; Ssemmanda et al., 2020; Sserwambala, 2018 in NEMA, 2019a; Transparency International, 2021; UBOS, 2021 & 2021b; UNDP & NEMA, 2017; UNEP-WCMC, undated; 2021; UWA, 2018, 2019, 2021; World Bank, 2020, 2021. See the full case study for full references.

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