Kenya | Joint Market Monitoring Initiative (JMMI)

Q2 2025 (April - June)

MARKET OVERVIEW

INTRODUCTION

The **Joint Market Monitoring Initiative (JMMI)** was established under the guidance of the Kenya Cash Working Group (KCWG) to inform cash-based interventions and to gain a deeper understanding of market dynamics in Kenya. The JMMI assesses the availability and prices of essential commodities typically sold in markets and consumed by the average household in Kenya's arid and semi-arid land (ASAL) counties. It is conducted quarterly in collaboration with local and international non-governmental organizations (NGOs).

According to the June 2025 drought classification by the National Drought Management Authority (NDMA), all 23 ASAL counties were classified under the 'Normal' drought phase, following the positive effects of the March–April–May (MAM) 2025 long rains.[4] The annual inflation rate stood at 3.8% in June 2025, indicating slight upward pressure under the period of review.[5] Despite the MAM 2025 season, the Kenya National Bureau of Statistics (KNBS) highlighted that inflation was primarily driven by increases in the food and non-alcoholic beverages category, due to notable price increases in key food staples.[5]

The data collection for Q2 2025 was conducted from 20th June to 7th July 2025. This factsheet presents an overview of **key foods and non-food items (NFIs) prices and cost of the MEB[1] in the assessed areas.** Additionally, it evaluates the supply chains along with the vendors' perceptions of the marketplace and their commercial operations to better understand market dynamics.

**For more information on the methodology, please refer to page 10.*

Q2 2025 ASAL COVERAGE

309	Vendors interviewed
34	Commodities assessed
31	Markets assessed
11	Participating agencies
5	Counties assessed

KEY INDICATORS

Cost of Food MEB[1]	Cost of Non-Food MEB[1]	Cost of MEB[1]
14,931 KES	5,400 KES	20,331 KES
115.24 USD[2]	41.68 USD[2]	156.92 USD[2]
▲ 950 KES (7%)[3]	▲ 416 KES (8%)[3]	▲ 1,365 KES (7%)[3]

ASSESSED COUNTIES AND MEDIAN TOTAL MEB VALUES

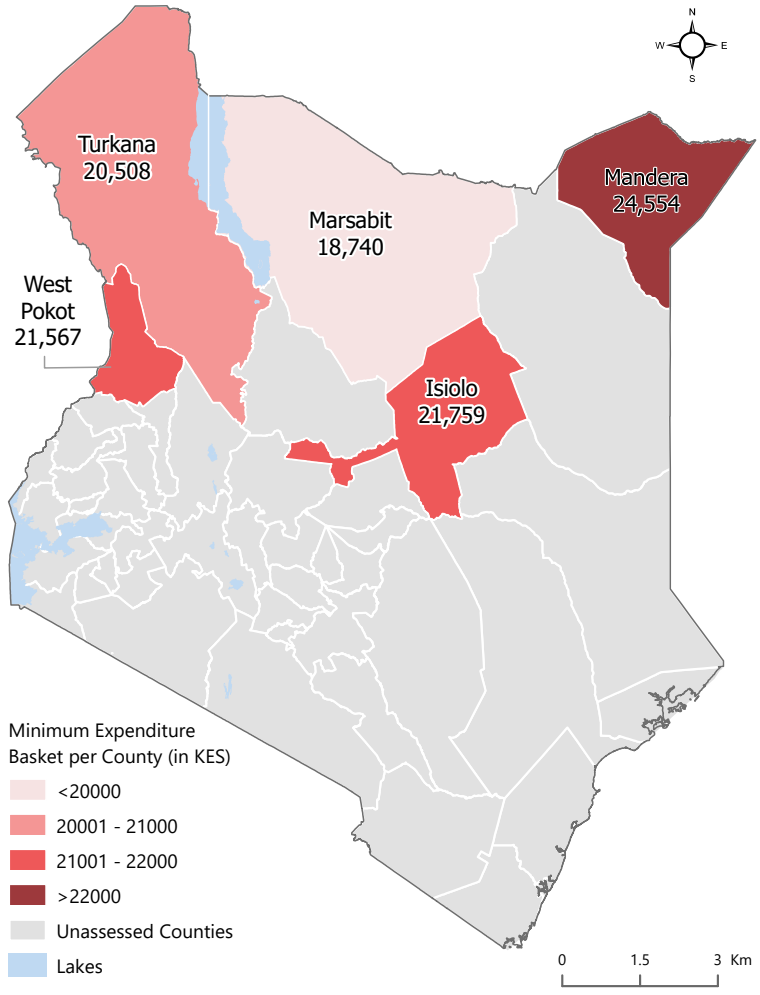


Figure 1: Map of the Q2 2025 assessed counties and MEB values

KEY FINDINGS

- Overall, the national **Minimum Expenditure Basket (MEB)[1] increased by 7%**. Rising prices continue to erode households (HH) purchasing power, driven mainly by higher food and water prices. This may further limit the ability of vulnerable HHs to meet basic needs.
- A majority (93%) of the interviewed vendors reported facing operational challenges, including low demand, high supply costs, and lack of funds to restock. Nearly half (43%) of interviewed vendors reported having faced difficulties keeping their businesses operational and well-stocked.
- While **most key goods remain physically available, vendors reported that customers increasingly cannot afford them,** and vendors reported low consumer demand. These findings suggest that economic affordability, rather than physical availability, is the more significant constraint to market access for HHs.
- Of the 31 markets assessed, 81% were classified as having limited functionality and 16% as having poor functionality, facing issues related to affordability and resilience. This highlights ongoing challenges in market operations and underscores the importance of continued market monitoring.

ONLINE DASHBOARD

An interactive online dashboard is available to explore the data collected through the JMMI, including the prices of monitored items and the cost of the MEB across different ASAL counties in Kenya and time periods. To access the dashboard, visit https://dashboards.impact-initiatives.org/ken/jmmi/

KENYA CASH WORKING GROUP

RURAL MINIMUM EXPENDITURE BASKET (MEB)

The MEB[1] is composed of essential commodities and services and represents the average minimum cost of the culturally adjusted basic items required to support a six-person household (HH) for one month.

The cost of the Rural MEB can be used as a proxy for the expenses facing a six-person HH to cover its basic needs for one month. Only the MEB's key elements, i.e. food and NFIs as defined by the KCWG, were incorporated into computing the MEB.

Food Items	Quantity
Maize flour	32.25 Kg
Rice	22.5 Kg
Cowpeas	7.5 Kg
Oil, Vegetable	5.25 L
Dried beans	7.5 Kg
Cow milk, whole, not fortified	22.5 Kg
Leafy vegetables, dark green	15 Kg
Salt, Iodized	0.75 Kg
Sugar	0.75 Kg

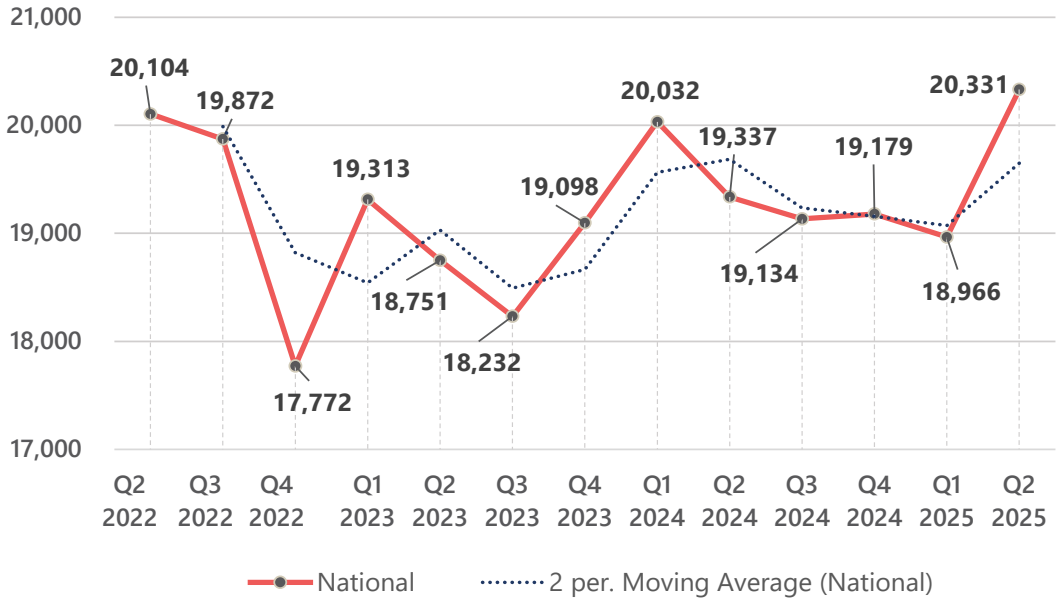
Non-Food Items	Quantity
Water	1,125 L
Multipurpose soap	2.2 Kg
Toothpaste	0.425 L
Sanitary pads	2 packs of 8
Education (pen, pencil, book, rubber, sharpener)	2 stationary kits
Charcoal	12 Kg
Solar Lamp	1 piece
National Health Coverage	500 KES
Communication (Airtime)	300 KES
Public transport	200 KES

COST OF THE MEB IN KES[2] AND CHANGE SINCE Q1 2025

County	MEB[1]	Change[3]	Food MEB	Change[3]	NFI MEB	Change[3]
Mandera	24,554	▼ 2%	18,949	▲ 8%	5,605	▼ 24%
Isiolo ●	21,759		14,425		7,334	
West Pokot	21,567	▲ 22%	15,079	▲ 11%	6,488	▲ 62%
Turkana	20,508	▼ 6%	15,956	▲ 3%	4,552	▼ 28%
Marsabit	18,740	▼ 2%	13,325	▼ 2%	5,415	▼ 3%

● : No MEB evolution data has been reported due to the absence of data collection in Isiolo County during the previous round (Q1 2025).

EVOLUTION OF THE NATIONAL RURAL MEB (KES[2]) OVER TIME



The national MEB exhibited fluctuating trends between Q2 2022 and Q2 2025, reflecting changing market dynamics over time, including periods of increased inflationary pressures and favorable climatic conditions that temporarily eased commodity prices or improved supply conditions. The lowest recorded value was KES 17,772 in Q4 2022, while the highest was KES 20,331 in Q2 2025.

Q2 2025 MEB TAKEAWAYS

- An increase in the food MEB was observed across most assessed counties, reflecting rising prices of key food commodities and suggesting an increasing cost burden on households.
- In contrast, the NFI MEB showed unit prices for most non-food items remaining stable or even declining, except in West Pokot County, where the cost of refilling a 20-litre jerry can of water rose sharply from KES 10 to KES 40, driving up the overall NFI MEB.
- Across counties, Mandera County recorded the highest Food MEB, while Isiolo County reported the highest NFI MEB, underscoring regional variations in market dynamics.
- According to the June 2025 KNBS report, food prices showed mixed trends.[5] Price increases were recorded for sugar, staples such as loose maize grain and maize flour, as well as vegetables including kale and tomatoes. In contrast, kerosene and LPG prices declined, while the cost of solid fuels, particularly firewood and charcoal rose during the period under review.

FOOD AND NFI PRICE COMPARISON

- Between March and June 2025, price increases were observed across most food commodities. The most notable increases among the MEB components included sugar (+29%) and maize flour (+11%). In line with seasonal trends, the prices of vegetables such as kale (+33%), spinach (+33%), and traditional vegetables (+25%) also rose. Despite the availability of forage and water, coupled with improved livestock body conditions,[4] the unit price of cattle milk (1L) increased by 7%.
- Among the monitored NFI items, a sharp increase (+67%) in water refill costs contributed to the overall rise in the national NFI MEB. Charcoal price declined (-12%) while the cost of firewood rose (+50%).

COST OF THE MEB IN KES[2] AND CHANGE SINCE PREVIOUS ROUND

Items	Overall median cost	Change[3]	Isiolo	Mandera	Marsabit	Turkana	West Pokot
White maize (1 Kg)	100	▲ 51%	100	117.5	70	100	65
Maize flour (1 Kg)	100	▲ 11%	100	130	100	100	85
Wheat flour (1 Kg)	100	0%	120	122.5	100	100	100
Rice (1 Kg)	130	▲ 4%	130	140	120	140	130
Beans (1 Kg)	140	▼ 3%	120	200	140	100	140
Cowpeas (1 Kg)	140	▼ 3%	125	260	120	140	260
Pigeon peas (1 Kg)	288	▲ 45%	*	275	100	300	300
Tea leaves (50 g)	50	▲ 100%	50	50	30	30	50
Cattle milk (1 L)	160	▲ 7%	160	220	120	200	160
Vegetable oil (1 L)	300	▲ 2%	250	290	300	300	300
Salt (200 g)	15	▲ 7%	20	20	10	15	10
Sugar (1 Kg)	200	▲ 29%	200	145	150	200	200
Onions (1 Kg)	100	0%	80	140	100	100	110
Tomatoes (1 Kg)	100	0%	95	110	100	100	150
Kale (1 Kg)	80	▲ 33%	80	100	50	100	65
Spinach (1 Kg)	80	▲ 33%	80	100	55	100	65
Traditional vegetables (1 Kg)	100	▲ 25%	100	*	100	100	80
Cabbage (500 g)	100	0%	95	100	100	100	80
Soap (120 g)	50	▲ 9%	50	40	50	30	50
Sanitary pads (8 pack)	100	0%	100	100	100	100	100
Toothpaste (35 ml)	50	▼ 9%	70	50	50	50	80
Jerry can (20 L)	200	▲ 33%	220	300	200	200	150
Bucket (20 L)	250	▲ 12%	200	350	150	250	250
Solar lamp (1 pc)	600	▼ 14%	625	550	625	550	600
Refill Liquefied Petroleum Gas (LPG 6 Kg)	1,400	**	1,200	1,600	1,150	1,400	1,600
Firewood (1 bundle)	150	▲ 50%	100	120	200	150	200
Charcoal (2 Kg)	75	▼ 12%	100	180	75	50	55
Kerosene (1 L)	200	▼ 17%	*	150	250	*	*
Pen (1 pc)	10	0%	20	20	10	10	10
Pencil (1 pc)	10	0%	15	10	10	10	10
Rubber (1 pc)	10	0%	12.5	10	10	10	10
Exercise book (1 pc)	20	0%	15	35	15	20	20
Sharpener (1 pc)	10	▲ 33%	20	10	10	10	10
Water refill from a tap stand or borehole (20 L)	25	▲ 67%	50	20	25	20	40

Items	Remaining stock (days)	Time needed to restock (days)
White maize (1 Kg)	21	1
Maize flour (1 Kg)	20	1
Wheat flour (1 Kg)	21	1
Rice (1 Kg)	20	1
Beans (1 Kg)	21	1
Cowpeas (1 Kg)	21	2
Pigeon peas (1 Kg)	30	5
Tea leaves (50 g)	20	1
Cattle milk (1 L)	7	1
Vegetable oil (1 L)	21	1
Salt (200 g)	28	1
Sugar (1 Kg)	20	1
Onions (1 Kg)	5	1
Tomatoes (1 Kg)	3	1
Kale (1 Kg)	2	1
Spinach (1 Kg)	2	1
Traditional vegetables (1 Kg)	2	1
Cabbage (500 g)	4	1
Soap (120 g)	21	1
Sanitary pads (8 pack)	30	1
Toothpaste (35 ml)	30	1
Jerry can (20 L)	22	2
Bucket (20 L)	30	2
Solar lamp (1 pc)	30	5
Refill LPG (6 Kg)	30	2
Firewood (1 bundle)	30	3
Charcoal (2 Kg)	15	1
Kerosene (1 L)	20	3
Pen (1 pc)	30	1
Pencil (1 pc)	30	1
Rubber (1 pc)	30	1
Exercise book (1 pc)	30	1
Sharpener (1 pc)	30	1
Water refill from a tap stand or borehole (20 L)	***	***

* No price data collected as a result of the unavailability of the respective commodity at the time of data collection.
** No quarterly comparison for LPG due to the absence of the price of gas during the previous round (Q1 2025).
*** No information regarding the remaining stock days and the time needed to restock was collected.

AVAILABLE STOCK, TIME NEEDED TO RESTOCK, AND CURRENT AVAILABILITY OF ITEMS IN THE MARKET

Items[6]	Number of KIs interviewed per item	Wide availability (% KIs)	Limited availability (% KIs)	Complete unavailability (% KIs)
White maize (1 Kg)	133	64%	32%	3%
Maize flour (1 Kg)	180	75%	25%	0%
Wheat flour (1 Kg)	162	70%	29%	2%
Rice (1 Kg)	159	72%	27%	1%
Beans (1 Kg)	151	65%	34%	1%
Cowpeas (1 Kg)	30	16%	43%	40%
Pigeon peas (1 Kg)	19	8%	35%	54%
Tea leaves (50 g)	127	75%	25%	0%
Cattle milk (1 L)	81	56%	38%	4%
Vegetable oil (1 L)	154	69%	29%	0%
Salt (200 g)	161	81%	19%	0%
Sugar (1 Kg)	168	77%	23%	0%
Onions (1 Kg)	96	66%	34%	0%
Tomatoes (1 Kg)	93	65%	34%	1%
Kale (1 Kg)	74	46%	52%	2%
Spinach (1 Kg)	57	31%	58%	10%
Traditional vegetables (1 Kg)	24	14%	52%	33%
Cabbage (500 g)	88	59%	41%	0%
Soap (120 g)	128	77%	23%	0%
Sanitary pads (8 pack)	88	59%	40%	1%
Toothpaste (35 ml)	61	40%	49%	11%
Jerry can (20 L)	43	25%	71%	0%
Bucket (20 L)	41	34%	57%	7%
Solar lamp (1 pc)	27	25%	52%	18%
Refill LPG (6 Kg)	33	32%	57%	10%
Firewood (1 bundle)	18	44%	36%	13%
Charcoal (2 Kg)	43	54%	32%	8%
Kerosene (1 L)	15	11%	51%	29%
Pen (1 pc)	83	73%	25%	2%
Pencil (1 pc)	80	72%	27%	1%
Rubber (1 pc)	63	59%	38%	2%
Exercise book (1 pc)	77	68%	30%	2%
Sharpener (1 pc)	62	63%	35%	1%
Water refill from a tap stand or borehole (20 L)	31	71%	24%	0%

Nearly a quarter (26%) of vendors self-reported limited or no availability of some commodities, while almost half of the interviewed vendors (43%) indicated experiencing difficulties in restocking.

Vegetables such as spinach (58%), traditional vegetables (52%), and kale (52%) were among the food items for which a higher proportion of vendors reported limited availability. Consequently, the absence of vendors selling traditional vegetables resulted in data gaps for these items in Mandera County, likely due to local dietary preferences or seasonal factors affecting supply.

Among NFIs, household essentials such as jerrycans (71%) and buckets (58%), as well as energy sources including LPG cooking gas (57%), solar lamps (52%), and kerosene (51%), recorded the highest proportions of vendors reporting limited availability in the market at the time of data collection. Additionally, these items exhibited slightly delayed restocking compared to other assessed commodities, possibly due to their transportation needs that may lead to longer restocking times.

Despite the reported challenges in restocking, most vendors indicated that both food and NFIs were typically restocked within one day. This short restocking period suggests that market supply chains remain relatively efficient and responsive. Consumable goods such as food, soap, and charcoal generally require more frequent replenishment than non-consumable items like solar lamps and buckets, in order to consistently meet household demand.

Overall, staple foods were found to be more widely available across markets, with salt, sugar, maize flour, and tea leaves accessible.

MAIN SUPPLY ROUTES

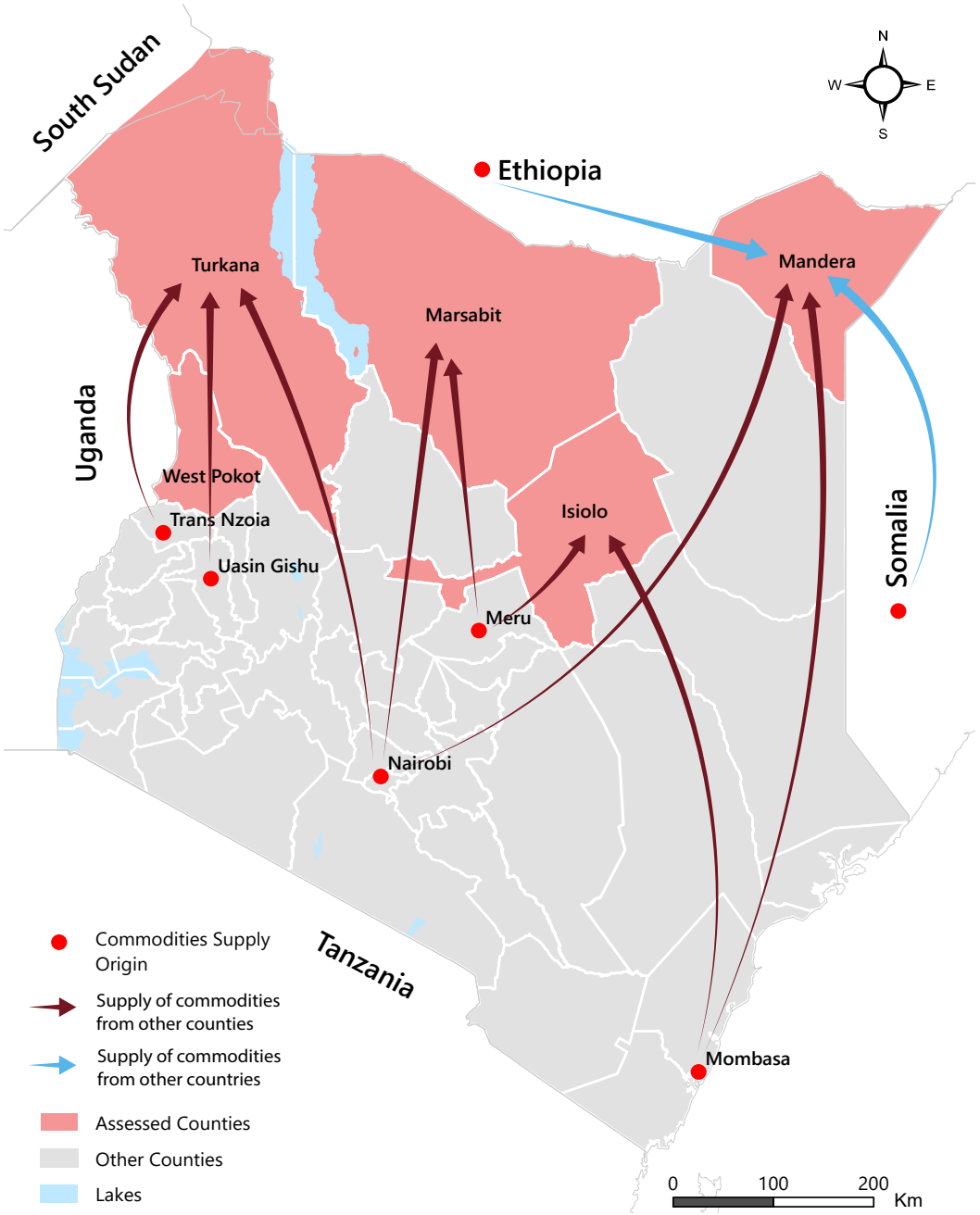


Figure 2: Map of main supply route of assessed counties

• This is a self-reported question by the vendors, and opinions may change from one vendor to another.

LOCATION OF MAIN SUPPLIER

Figure 2 presents the supply route map, illustrating the flow of commodities from main suppliers as reported by interviewed vendors. Understanding these supply routes is essential for assessing market resilience.

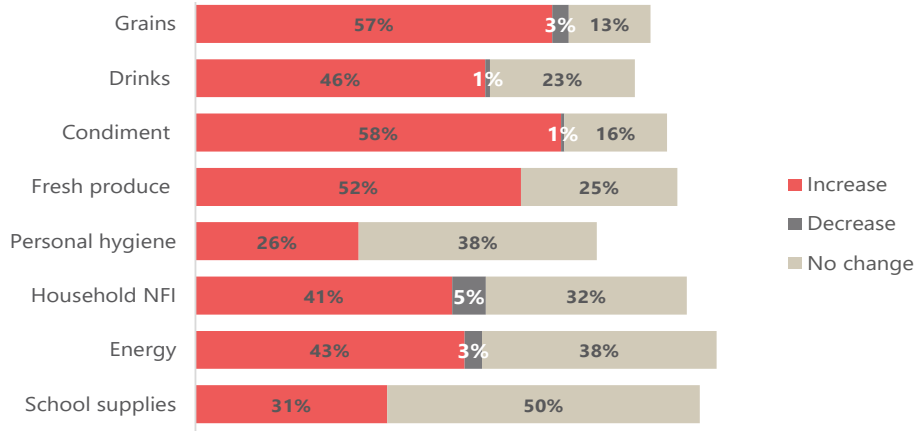
Almost all interviewed vendors (97%) reported that their main suppliers were located within Kenya, primarily within their respective counties, followed by neighboring counties. Additionally, sourcing was also reported from Meru, one of the leading counties in agricultural production and from Trans Nzoia and Uasin Gishu counties, both known largely for grain farming.[7] In contrast, vendors in Mandera County indicated sourcing various grains (33%) and household NFIs (13%) from suppliers based in Mombasa, while 11% of vendors in Isiolo County reported obtaining condiments from Mombasa as well.

Findings further indicate limited reliance on cross-border trade, with only a few vendors (n=8)[8] reportedly sourcing grains, condiments, and household NFIs from neighboring countries such as Ethiopia and Somalia. These vendors were exclusively located in Mandera County.

REPORTED PREDICTED CHANGES IN SUPPLIERS' PRICES

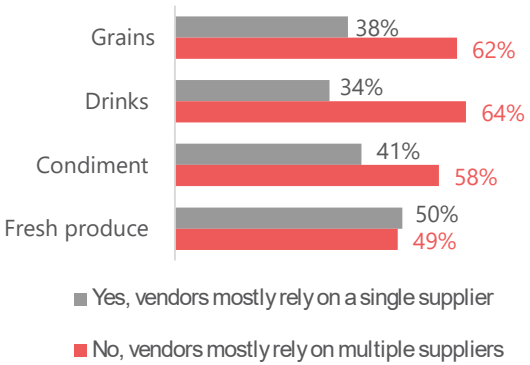
According to the KNBS the overall Consumer Price Index (CPI) increased from 144.88 in May 2025 to 145.58 in June 2025, translating to a monthly inflation rate of 0.5%.[5] The national trend reflects sustained upward pressure on commodity prices. A considerable proportion of vendors reported expected price increases, particularly for grains (57%) among the food items and for energy sources (43%) among NFIs. The most commonly cited reasons for the anticipated price increases were reduced supply due to limited availability, higher demand for the commodities, and the rising exchange rate. These anticipated price increases, especially for essential food and NFI commodities, may indicate potential strain on household purchasing power and market stability if supply constraints persist. Nearly half (43%) of the interviewed vendors reported that they were able to predict price changes in popular commodities one month ahead of data collection.

Expectation of supplier price changes one month following data collection, by % of vendors who reported being able to predict supplier price changes by category:[6,•]

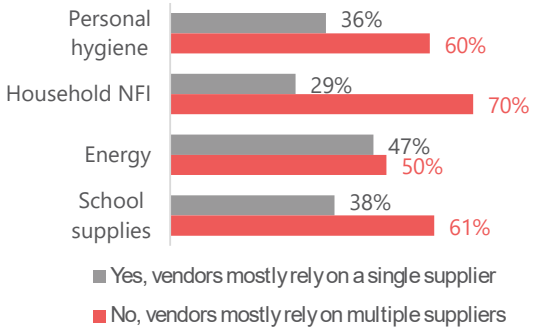


SUPPLIER

% of vendors reporting that they mostly relied on a single supplier for food items at the time of data collection, by category:[9]



% of vendors reporting that they mostly relied on a single supplier for non-food items at the time of data collection, by category:[9]

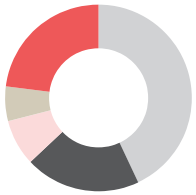


At the time of data collection, most interviewed vendors reported relying on multiple suppliers, except for fresh produce vendors, half (50%) of whom sourced from a single supplier. Relying on multiple suppliers can help vendors obtain competitive prices and ensure the continuous availability of a wide range of products.

ACCESS TO A LOCKED, SECURED STORAGE FACILITY

In the 3 months prior to data collection, almost two-thirds (63%) of the vendors reported having access to a locked or secure storage facility within the marketplace. Few (14%) vendors had storage facilities located outside the marketplace or at their homes. Access to a secure storage facility offers an array of benefits. It limits the likelihood of theft, vandalism, and damage caused by environmental factors, ensuring that product quality and shelf life are not compromised. Conversely, nearly a quarter (23%) had no access to storage at all, which likely limits their ability to keep adequate stock and restricts their product offerings.

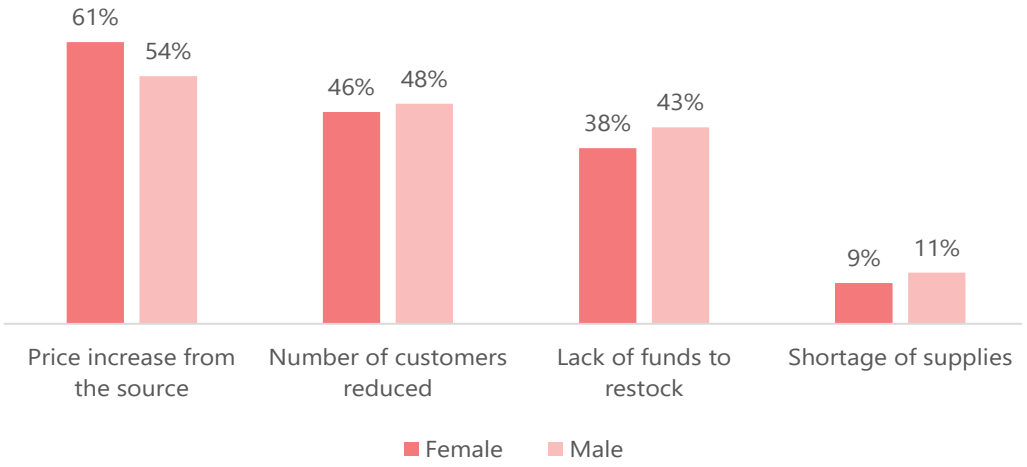
% of vendors reporting on access to a locked, secured storage facility within the marketplace in the 3 months prior to data collection:



43%	Yes, storage within own business facility
20%	Yes, storage elsewhere within the marketplace
8%	No, storage outside the marketplace at another facility
6%	No, storage at home
23%	No storage facility

CHALLENGES FACED BY VENDORS

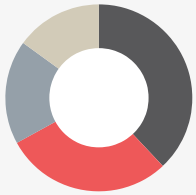
Most reported challenges faced in the 3 months prior to data collection, by % of all interviewed vendors by gender:[9]



A high proportion of vendors (93%) reportedly faced vendor-related challenges, with price increases and reduced customer demand being the most commonly cited issues across both genders.

CHANGE IN THE NUMBER OF VENDORS

Proportion of vendors reporting on changes in the number of vendors operating in their marketplace in the 3 months prior to data collection:



Increase	38%
Decrease	29%
No change	18%
Do not know	15%

% of vendors estimating the proportion of businesses that had stopped operating in their marketplace in the 3 months prior to data collection among the vendors (29%) who reported a decrease:

Very few (1%-10%)	26%
Few (11%-25%)	40%
Some (26%-50%)	24%
A lot (51%-75%)	9%
Most (76%-100%)	0%
Do not know	1%

Additionally, issues related to infrastructure damage within the marketplace were mostly reported in Isiolo (30%)[9] followed by Mandera (18%)[9] County. Challenges related to road damage were most commonly reported by vendors in West Pokot (22%)[9] and Mandera (18%)[9] Counties.

Despite the reported challenges experienced, more than a third (38%) of interviewed vendors reported an increase in the number of vendors operating in their marketplace.

DIFFICULTY IN KEEPING THE BUSINESS OPERATIONAL AND WELL STOCKED

Most reported restocking challenges at the time of data collection, by % of all interviewed vendors:[9]

- **36%** Difficulty with price charged by supplier
- **10%** Distance to the supplier is far
- **10%** Unpaid market purchases made on credit
- **8%** Lack of funds to restock

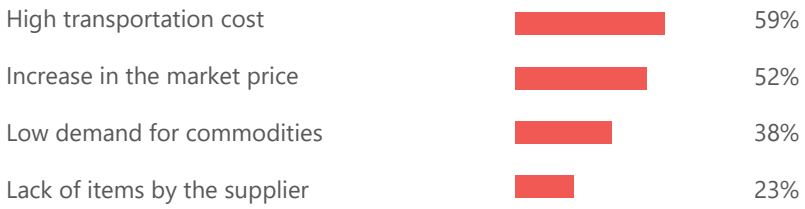
Among interviewed vendors, 50% of men and 39% of women reported difficulties keeping their businesses operational and adequately stocked. The most common challenges directly affected their ability to purchase new stock, ultimately reducing overall business profitability.

Difficulties in restocking key commodity categories were mainly reported for fresh produce (22%), household NFIs (21%), and energy items (21%), suggesting the presence of supply chain constraints that could affect the consistent availability of essential goods in the market.

Conversely, lower levels of restocking difficulty were reported for condiments (11%), personal hygiene products (10%), and school supplies (5%), indicating relatively more stable supply chains for these categories.

SHORTAGE OF COMMODITIES

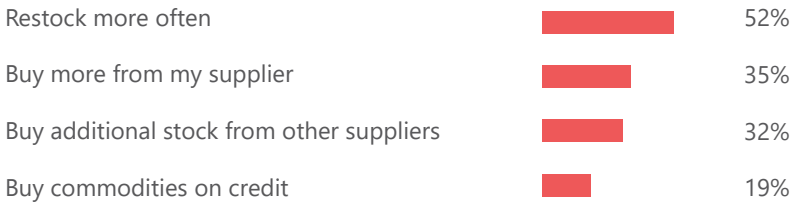
Most reported causes of shortages for commodities at the time of data collection, by % of vendors (26%) who reported experiencing shortages of some commodities:[9]



Compared to the previous quarter, the proportion of vendors who reported experiencing limited or complete unavailability of some commodities decreased (from 33% down to 26%). Similar to the previous round, the high transportation costs (59%)[9] and increase in market prices (53%)[9] were identified as contributing factors to these shortages. The high transportation cost is notable, as it may lead to an increase in operational costs for businesses, which may be passed on to consumers in the form of higher prices for goods and services.

COPING MECHANISMS EMPLOYED

Most reported strategies used by interviewed vendors to address unavailability of commodities at the time of data collection, by % of vendors (26%) who reported experiencing shortages of some commodities:[9]



The primary coping mechanism reported by vendors facing shortages was to restock more frequently, often by sourcing additional stock from alternative suppliers or acquiring goods on credit within the market. However, a few vendors in Marsabit (4%) and Turkana (3%) reported having no coping mechanisms in place. The lack of adaptive strategies leaves these vendors particularly vulnerable to income losses and operational disruptions during periods of commodity shortages.

CHALLENGES FACED WHEN TRANSPORTING COMMODITIES

Most reported transportation challenges in the 3 months prior to data collection, by % of all interviewed vendors:[9]

- **71%** High cost of transport
- **23%** Distance is too far to cover on foot
- **18%** Vehicle breakdowns during transit
- **11%** Unusable roads

Among all assessed counties, the high cost of transportation emerged as the most frequently cited challenge, with more than three-quarters of interviewed vendors (79%) reporting being affected. Petroleum prices showed mixed trends, with the unit cost of petrol increasing, while prices for kerosene and diesel recorded a decline.[10]

The majority (94%) of vendors relied on motor vehicles as their primary means of transport, which may contribute to higher retail prices, increased operational expenses, and disruptions in the consistency of supply. Most vendors (88%) sourced their commodities directly, while the remaining 12% relied on deliveries from suppliers.

Most reported mode of transport commonly used by vendors when restocking commodities:

1. 94% Motor vehicles (Passenger cars, Tuk Tuk, Bus, Motorcycle, Boat, Van, Pickup, Truck, Lorry)
2. 4% Supplier delivers
3. 1% Bicycle

BARRIERS TO MARKET ACCESS

Physical barriers

Marketplaces appeared to be accessible, as 79% of interviewed vendors reported that they did not face any issues with physically accessing the marketplace. **Physical access barriers were most commonly reported in Marsabit,** where 53% of vendors indicated challenges accessing the market, followed by Mandera at 18%.

Most reported physical barriers to accessing the marketplace in the 3 months prior to data collection, by % of all interviewed vendors:[9]

- **8%** Curfew or movement restrictions
- **6%** Limited transportation options
- **4%** Inadequate facilities
- **2%** Limited operating hours of the market

Social barriers

Mandera and Marsabit counties, both at 6%, had the highest proportion of vendors reporting social barriers that led people to avoid the marketplace. In contrast, none of the vendors interviewed in Isiolo and West Pokot reported experiencing any discrimination or exclusion. The difference in findings across counties highlight the contextual factors that potentially impact access to markets.

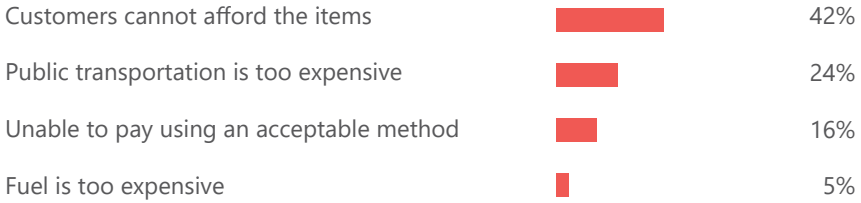
% of vendors reporting groups of people who sometimes avoided going to the marketplace in the 3 months prior to data collection due to discrimination, exclusion, or feeling unwelcome:

Yes	4%
No	88%
Don't know	8%

Financial barriers

More than two-thirds of vendors (69%) cited financial challenges affecting their customers, indicating that consumer purchasing power remains constrained. The primary financial challenge reported was customers' inability to afford available items, followed by high transportation costs, which limited their physical access to markets and likely contributed to the reported decrease in the customer numbers in the 3 months prior to data collection. Overall, customers faced financial difficulties both in reaching the markets and in affording goods, as perceived by the assessed vendors.

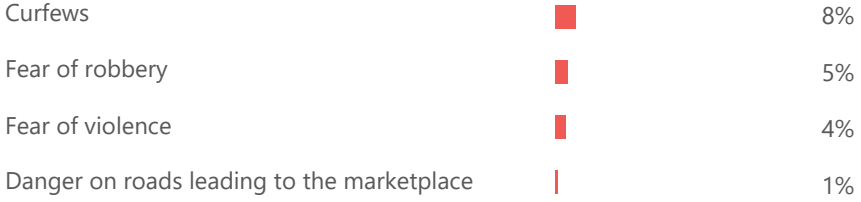
Most reported financial barriers to accessing the marketplace in the 3 months prior to data collection, by % of all interviewed vendors:[9]



Customers cannot afford the items	42%
Public transportation is too expensive	24%
Unable to pay using an acceptable method	16%
Fuel is too expensive	5%

SECURITY ISSUES

Most reported security factors that negatively impacted businesses in the 3 months prior to data collection, by % of all interviewed vendors:[9]



Curfews	8%
Fear of robbery	5%
Fear of violence	4%
Danger on roads leading to the marketplace	1%

Among the interviewed vendors, 16% reported being affected by security-related issues, with curfews identified as the main concern, particularly in Marsabit (30%)[9] and Turkana (2%)[9] counties. The resulting restrictions on trading hours and reduced customer movement likely affected sales and overall business activity in these counties. The security situation in the ASAL counties remains localized but persistent, affecting market access, humanitarian operations, and community resilience. These counties continue to experience recurrent insecurity, often linked to intercommunal and cross-border tensions driven by competition over natural resources, such as pasture and water. Among the assessed counties, Marsabit (32%) recorded the highest proportion of vendors reporting that security factors negatively impacted their business operations.

ACCEPTABLE MODE OF PAYMENT

Most reported accepted payment methods by vendors in the 3 months prior to data collection:[9]

1. 88% Cash (local currency)
2. 82% Mobile money
3. 6% Money transfers
4. 5% Informal credit
5. 3% Credit or Debit cards

CHANGE IN THE NUMBER OF CUSTOMERS

Proportion of vendors reporting changes in the number of customers purchasing from their shops in the 3 months prior to data collection:

Yes	56%
No	33%
Do not know	11%

% of vendors reporting on the change in the number of customers purchasing from their shop in the 3 months prior to data collection, among those vendors (56%) who reported a change:

Decrease	65%
Increase	35%

MARKET FUNCTIONALITY SCORE (MFS)[11]

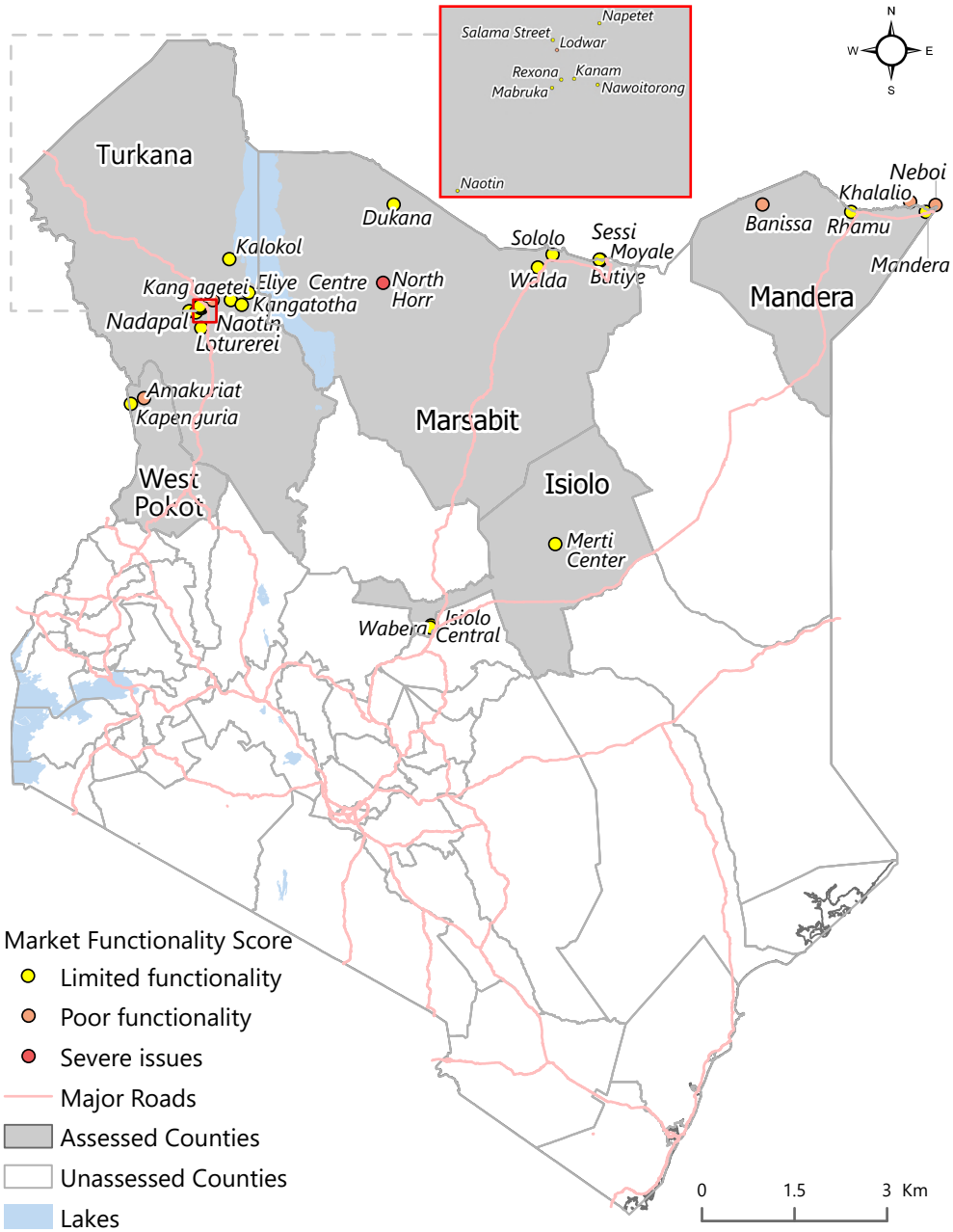


Figure 3: Map of market functionality of Q2 2025 assessed markets

MARKET FUNCTIONALITY

Market functionality, an extension of the JMMI, integrates indicators from all segments of the assessment and is measured across five key dimensions, each assigned a standard weight:

- **Accessibility (25%)**: physical and social access to markets.
- **Availability (30%)**: ability of markets to consistently supply core commodities.
- **Affordability (15%)**: financial access to markets and price volatility.
- **Resilience (20%)**: vulnerability of supply chains and ease of restocking.
- **Infrastructure (10%)**: state of markets' physical and financial infrastructure.

Each dimension contributes to assessing a market's overall capacity to supply customers with essential food and NFIs while enabling vendors to operate effectively. The market classification is determined by aggregating indicators across all assessed vendors to generate a market functionality score (MFS).[11]

Affordability was the lowest-performing dimension, assessed through price comparisons of monitored items against national medians, customers' financial access, and the predictability of commodity prices. Almost all (97%) of the markets assessed scored below 50% of the maximum weighted score of 15%, reflecting the relatively high prices reported and the financial barriers faced by customers, as indicated by 69% of interviewed vendors. The resilience dimension followed, highlighting challenges in maintaining supply chains and ensuring consistent stock availability.

The dimension with the highest overall performance was infrastructure and availability, with only two of the 31 assessed markets achieving less than 50% of the maximum score within these dimensions. The widespread use of mobile money platforms in Kenya provides an alternative payment method to cash, strengthening the financial infrastructure within the markets.

Out of the 31 markets assessed, most (81%) were classified as having limited functionality, while 16% were classified as having poor functionality. North Horr market in Marsabit County was the only market found to have severe functionality issues. All interviewed vendors within the market reported experiencing limited or complete unavailability of assessed commodities, which affected the scores on availability and affordability, leading to a less favorable market classification. In addition, all (n=18)[8] interviewed vendors within the market reported facing security related challenges in the 3 months prior to data collection.

Markets in remote ASAL areas, while serving local communities, often have a limited number of vendors, which can further constrain market functionality. However, it is important to note that the MFS computation is based on five dimensions and may not capture all relevant market attributes. Therefore, market functionality results should be interpreted in context and complemented with local insights into county-level market dynamics.

Methodology

The JMMI is conducted jointly with KCWG partners. The geographic coverage was determined by the access and capacity of participating partners. However, recurring challenges with achieving wider geographic coverage are often linked to resource constraints, and may be further limited by funding gaps or freezes. The participating agencies collectively developed and reviewed the data collection tools and trained their enumerators on the JMMI methodology and data collection tools. **Primary data was collected through structured interviews with vendors (who sell directly to customers) in the targeted marketplaces.** Enumerators were instructed to collect at least three price points per item in each of the assessed marketplaces, covering a total of 34 basic food and NFI items. Data was collected through the KoboCollect mobile application and was uploaded to a secure Kobo server for cleaning and analysis.

For each item, the median prices per marketplace were calculated, after which the median of all those locations was calculated to derive the aggregated median prices presented in this factsheet. This methodology is derived to minimise the effects of outliers and differing amounts of data among assessed locations. Outliers are reported only where relevant. Non-numeric indicators of categorical values are calculated as proportions.

Using the purposive sampling method, 309 vendors were interviewed as key informants. The interviews were conducted both face-to-face (93%) and remotely (7%) with vendors selling food and NFIs. Data was collected between 20th June and 7th July 2025 across 31 markets in the assessed counties.

REACH performed daily data quality checks with the partners during and after data collection. This process includes checking for duplicate interviews and numerical outliers (particularly item prices). Data was analysed at the county level using R statistical software.

All findings are indicative and only apply to the period within which data was collected. Moreover, item specifications may vary slightly between locations according to the different brands available, and comparability between the locations assessed is limited.

Challenges and Limitations

- Price data is only indicative of the time frame within which it was collected. Prices may vary between data collection.
- The methodology specifies that three prices are collected per commodity, per market. Due to the unavailability of multiple vendors selling various commodities at the market, it was not possible to collect 3 prices for some commodities in some markets.
- For some questions such as the challenges faced by vendors or change in the number of customers required vendors to recall events over a 3-month period. This is a long period of time, which might impact on the accuracy of answers.
- The JMMI data collection tool requires enumerators to record the cheapest available price for each item, but does not require a specific brand, as brand availability may vary. Therefore, price comparisons across regions may be based on slight variants of the same product.
- Some vendors lacked weighing scales. An estimate of how much 1 Kg was used for commodities such as vegetables, onions, and tomatoes. In some cases, the estimation may not have been accurate.
- Lack of visual confirmation and potential response bias among the 7% of data collected remotely.
- Not all sub-counties within the respective counties were assessed.

Endnotes

[1] The Minimum Expenditure Basked (MEB) is defined as what a household requires to meet basic needs on a regular or seasonal basis - and its average cost.

[2] 1 USD-129.57 KES in June, 2025.

[3] Change since the last round of JMMI data collection in March 2025 (Q1 2025).

[4] National Drought Early Warning Bulletin by NDMA, June 2025.

[5] Consumer Price Indices and Inflation Rates, June 2025.

[6] The total percentages may not add up to 100% due to rounding up or respondents choosing "Prefer not to answer" or indicating "I do not know."

[7] 2024 Gross Country Product by KNBS, December 2024.

[8] Sample size (n) refers to the total number of respondents (in this case vendors) in the sample under study.

[9] For multiple answer questions, respondents could select multiple options hence the findings may exceed 100%.

[10] EPRA Retail Petroleum prices in Kenya by Kenyan News, June 2025.

[11] Market Functionality Score (MFS) is used to classify markets based on their level of functionality. The MFS consists of a collection of indicators, drawn from a single vendor-focused assessment for ease of analysis, that capture data on the five different dimensions of market functionality. The markets are categorized into "full functionality", "reduced functionality", "limited functionality", or "poor functionality" based on the MFS.

About the Kenya Cash Working Group

The KCWG is a multi-agency, inter-cluster technical working group set up to ensure that cash and voucher assistance (CVA) in Kenya is coordinated, harmonised, and context-specific, and is undertaken in a manner that does not inflict harm or exacerbate vulnerabilities of the affected population. The working group was established to provide an enabling environment for collective learning, operational and technical collaboration. Additionally, develop a common reference point for both national and international actors for the harmonization of multi-purpose cash assistance (MPCA) across the country. The KCWG is currently co-chaired by the National Drought Management Authority (NDMA) and Kenya Red Cross Society (KRCS), and the MEB workstream is co-chaired by the World Food Programme (WFP) and REACH.

Participating agencies

HARAMBEE

National Drought Management Authority NDMA Committed to ending drought emergencies

Kenya Red Cross

WFP World Food Programme

TUPADO Turkana Pastoralist Development Organization Creating Change in Pastoralist lives

Merti Intergrated Developement Program Collective Action: Better Society

acted

RACIDA Building Resilient Communities for Sustainable Development

ASAL HUMANITARIAN NETWORK BUILDING RESILIENT COMMUNITIES

NAPAD NOMADIC ASSISTANCE FOR PEACE AND DEVELOPMENT

SND Strategies for Northern Development Confronting crisis | Building Resilience | Transforming lives

REACH Informing more effective humanitarian action