# **Ethiopia | Joint Market Monitoring Initiative (JMMI)**

31 March -14 April 2025

#### INTRODUCTION

The aim of the Ethiopia JMMI is to provide regular and reliable information on prices and market functionality through the use of harmonised tools and validated analysis. The Ethiopia JMMI is a joint exercise led by REACH in close collaboration with Ethiopia Cash Working Group (ECWG) members. This initiative aims to collaboratively develop an evidence base for the wider use of cash and voucher assistance (CVA), as well as facilitate discussions of changes in critical market dynamics, which are an integral part of cash feasibility considerations.

With a uniform methodology, ECWG members collect data from their respective areas of operation on a voluntary basis. The geographical coverage of the exercise depends on the ability of ECWG members to consistently collect data and thus the coverage varies from month to month.

Data for the April round was collected using key informant interviews (KIIs) conducted in woreda capitals between 31 March-14 April 2025. A minimum of three vendors were interviewed for each assessed commodity in each woreda. For commodity prices and stock levels, the median prices/ stock levels are calculated for each item within each assessed woreda. The national and regional median prices are aggregated results of the woreda median prices.

#### **KEY INDICATORS**

# Median Cost of JMMI Full Basket

13,049 ETB 101.25 USD<sup>1</sup>

▼ ETB 441 2%

# Median Cost of JMMI Food Basket

12,374 ETB 96.01 USD<sup>1</sup>

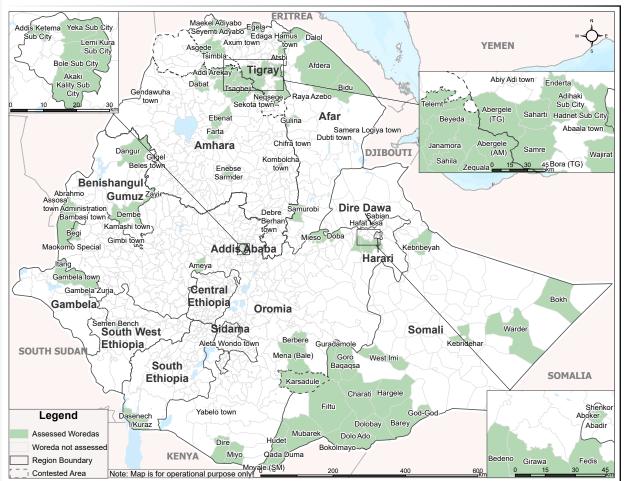
▼ ETB 396 2%

### **Median Cost of NFI Basket**

675 ETB 5.24 USD<sup>1</sup>

▲ ETB 45 7%

### Map 1: Assessed Marketplaces, By Woreda



### **Key Messages**

- The prices of the national JMMI full and food baskets decreased by 2% each between March 2025 and April 2025.
- Individual items, including camel meat (25%), lentils (14%), faba beans (13%), garden peas (13%), and maize (13%), experienced price surges in April 2025 compared to March 2025.
- In April 2025, 58% of assessed markets reported limited functionality, while 42% reported poor functionality. This reflects an improvement compared to March 2025, when 50% of markets had poor functionality. The issues affecting market functionality are likely related to availability and resilience challenges, which could impact the implementation of Cash and Voucher Assistance (CVA).
- Both the price surges and market functionality issues could be linked to the security situation in different parts of the country, particularly Amhara and Oromia regions. Additionally, continuous foreign exchange rate increase, low production and shortage of money likely pose challenges on market functionality and supply chain, in general.







### **Market Functionality Score (MFS)**

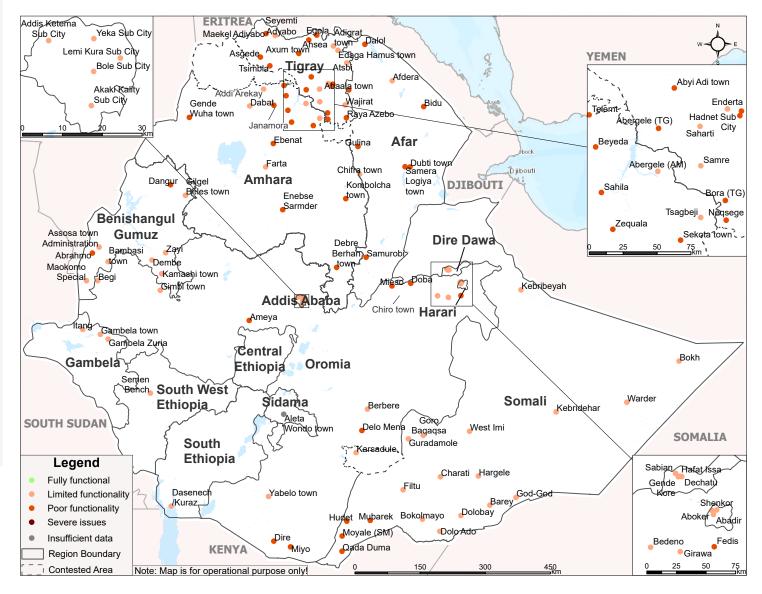
The Market Functionality Score (MFS) is a method of classifying markets based on their level of functionality, helping aid actors understand which markets function well enough to support cash and voucher assistance (CVA) and which may require alternative interventions. The MFS is divided into five dimensions:

- 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

### **Key Findings**

 During the April 2025 round, more than half (58%) of the assessed markets reported limited functionality, while the remaining 42% reported poor functionality. This reflects a relative improvement compared to the March 2025 findings, when 50% of markets were reported to have poor functionality.

# Map 2: Market Functionality Score (MFS), By Woreda









### **JMMI Basket**

The JMMI full basket is a set of food and hygiene items that represent some of the core monthly expenditures incurred by an average Ethiopian household (6 persons) in an average month (30 days). The food basket is designed to incorporate different sets of four staple crops in each region in order to reflect consumption patterns in the regions while the NFI basket consists of two hygiene items. The JMMI basket is based in part on the Ethiopia Cash Working Group's effort to develop a Minimum Expenditure Basket (MEB) for the Somali region in 2020<sup>2</sup>, it is not a complete MEB itself and does not reflect the full spectrum of regular household expenditures in Ethiopia. It can, however, be tracked over time to understand how household financial burdens are evolving.

### **Food Items**

Cereals & root crops (maize, sorghum, wheat, teff, Barley,	72 kg	Tomatoes Potatoes Onions Egg Cooking oil	5 kg 3 kg 5 kg 18 piece 5.86 L
rice & enset)		OII	
Meat	2.7 kg		
Green leafy vegetables	5 kg		

### **Non-Food Items**

Bath soap	0.375 kg (3* 125g
	bars)
Laundry soap	1.2 kg (6* 200g bars)

USD/ETB official exchange rate<sup>3</sup>

128.88 ETB

Food basket composition according to regional consumption patterns:

Beef	Addis Ababa, Amhara, Benishangul Gumuz, Gambela, Oromia, South Ethiopia, Harari, Dire Dawa, Sidama, SWE <sup>4</sup>
Beef and goat meat	Afar
Camel and goat meat	Somali
Maize, sorghum, teff, wheat	Addis Ababa, Gambela, Oromia, Amhara, Benishangul Gumuz, Harari, Dire Dawa
Maize, sorghum, wheat, rice	Somali
Maize, sorghum, teff, barley	Afar
Maize, teff, barley, enset	South Ethiopia, Sidama, SWE

### **Table 1: JMMI Full Basket Median Price Per Region**

Region	Full basket median price in Apr (ETB)	Full basket median price in Apr (USD)	Full basket median price in Mar (ETB)		Change since Mar 2025(ETB)
Addis Ababa	12,913	100.20	11,819	93.50	<b>4</b> 9%
Afar	19,095	148.20	17,166	135.80	<b>11</b> %
Amhara	10,552	81.90	9,200	72.80	<b>15</b> %
Benishangul Gumuz	10,171	78.92	9,964	78.90	<b>A</b> 2%
Dire Dawa	11,922	92.50	NA	NA	NA
Gambela	12,300	95.44	12,145	96.10	<b>1</b> %
Harari	11,345	88.03	NA	NA	NA
Oromia	11,218	87.04	10,992	87.00	<b>2</b> %
Sidama	14,073	109.20	15,238	120.60	▼ 8%
South Ethiopia	14,478	112.34	NA	NA	NA
Somali	18,790	145.81	18,153	143.70	<b>4</b> %
SWE	14,740	114.41	14,515	114.90	<b>A</b> 2%
Tigray	11,344	88.02	11,481	90.90	▼ 1%
National JMMI full b	asket <sup>5</sup> 13,	049 ETB	101.25 USD <sup>1</sup>	▼ ETB 262	2%
National JMMI food	I basket <sup>5</sup> 12,	374 ETB	96.01 USD1	▼ ETB 307	2%

# **Accepted Payment Modalities**

Proportion of vendors reporting accepting different types of payment in the 30 days prior to data collection<sup>5</sup>:

100%	Cash	(FTR
100%	Casii	(EID

2 41% Mobile transfer

36% Mobile money

### **Key Findings**

- Despite decreases in the JMMI full basket prices in 8 out of 10 regions, the national JMMI full basket price declined by only 2% between March and April 2025. Similarly, the national JMMI food basket price decreased by 2%.
- The highest increases in the regional JMMI full basket prices were reported in Amhara (15%), Afar (11%), and Addis Ababa (9%).
- Compared to April 2024, the national median price of the JMMI full basket increased by 17%.

<sup>&</sup>lt;sup>5</sup> National JMMI full and food basket prices in April were 13,049 ETB and 12,374 ETB respectively. The changes in Table 1 represent the difference between March and April 2025 prices.





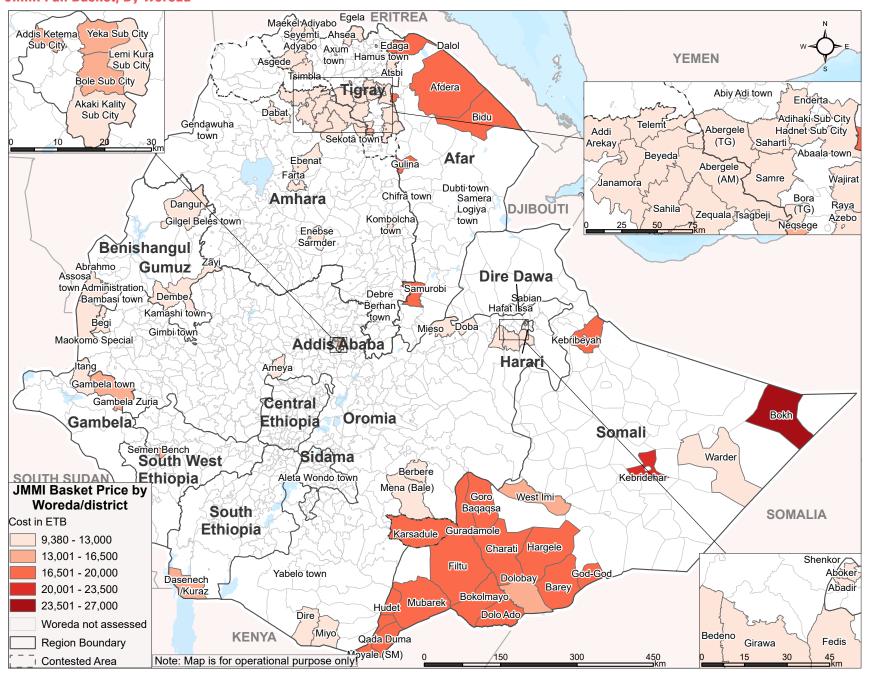


<sup>&</sup>lt;sup>2</sup> Minimum Expenditure Basket for Somali Region Guidance Note, June 2020. Additional sources consulted to assemble the JMMI Basket include the Ethiopia Food Security and Water, Sanitation and Hygiene (WASH) sectors, World Food Programme (WFP) vulnerability analysis and mapping (VAM), and publications by the Global WASH Cluster, Famine Early Warning System Network (FEWS NET), and the Food and Agriculture Organization of the United Nations (FAO).

<sup>3.</sup> Exchange rates are taken from the United Nations (UN) Operational Rates of Exchange

<sup>&</sup>lt;sup>4</sup> South West Ethiopia

Map 3: Cost of JMMI Full Basket, By Woreda









All items listed under the shelter and education sections are not included in the JMMI basket. These items are assessed solely to inform humanitarian actors involved in CVA about the price evolution of the items.

- Between March and April 2025, the highest monthly cereal price increases were observed for maize (13%), sorghum (9%), and wheat (7%).
- In April 2025, surges reported in the prices of garden peas (13%), lentils (9%), and faba beans (7%). A similar trend was observed in March 2025, when the prices of garden peas, faba beans, and lentils rose by 14%, 13%, and 8%, respectively.
- Among meat items, camel meat saw the highest price increase at 25%.
- Water purification prices rose by 67% while a 7% increase was reported on bath soap prices between March 2025 and April 2025.
- In April 2025, prices increased by 14%, 10%, 7%, and 4% for salt, milk, cooking oil, and sugar, respectively, compared to March 2025. Cooking oil also saw a similar trend in March 2025, with a 5% increase.

Table 2: National and Regional Median Prices Per Item<sup>6</sup>

Item <sup>7</sup>		onal change ce Mar 2025	National	Addis Ababa	Afar	Amhara	Benishangul Gumuz	Dire Dawa <sup>9</sup>	Gambela	Harari <sup>9</sup>	Oromia	Sidama	South Ethiopia <sup>9</sup>	Somali	SWE	Tigray
Cereals <sup>8</sup>	_															
Maize	<b>A</b>	13%	45	50	75	40	29	44.25	40	46.5	40	40	43.33	97.5	35	41.75
Sorghum		9%	60	105	75	60	36.5	50	70	56.25	50		NA	130	70	62
Teff	_	4%	125	130	155	110	125	145	140		117.5	100	NA		130	125
Wheat	_	7%	80	80	65	70	80	75	65	85	60		NA	120	120	75
Barley	_	17%	75		75							80				
Enset	_	25%	150		. 5							NA	NA		150	
Rice		13%	120		120									127.5	.50	
Pulses		1370												127.5		
Garden peas	_	13%	170	180		110	160	170	150	200	260	NA	200		75	256.25
Faba beans		7%	160	175		105	185	150	160	175	NA	NA	120		80	180
Lentils		9%	260	280		235	290	240	270	230	235	NA	280		120	290
Meat and Fish		370	200			200	230	2.0		250	200		200		.20	230
Beef <sup>8</sup>	_	5%	840	900		820	560	1000	800	800	1000	900	NA		800	800
Goat meat <sup>8</sup>	_	5%	1000		750									1050		
Camel meat <sup>8</sup>		25%	1000		1150									950		
Dry fish	_	31%	275						275							
Vegetables																
Green leafy <sup>8</sup>	_	20%	50	45	50	40	100	40	80	NA	50	NA	NA	100	70	50
Tomatoes <sup>8</sup>		18%	65	55	60	50	50	80	100	55.5	80	50	NA	130	70	50
Onions <sup>8</sup>	$\blacksquare$	7%	65	55	65	50	55	80	120	45.5	60	50	NA	136.25	60	60
Potatoes <sup>8</sup>		9%	60	50	61.25	50	60	60	60	45.5	47.5	40	NA	85	50	60
Okra	•	20%	80						80							
WASH																
Bath soap <sup>8</sup>	_	7%	75	110	60	50	49	45	90	50	65	NA	50	100	50	80
Laundry soap <sup>8</sup>	•	2%	65	67.5	70	60	60	60	80	60	80	NA	60	70	50	70
Sanitary pads	0%		65	55	NA	62.5	70	60	65	NA	65	NA	60	125	60	66.25
Water purification		67%	50	50	50	NA	25	NA	50	NA	30	NA	NA	60	50	27.5
Shelter NFIs																
Plastic bucket		14%	250	230	300	255	375	245	250	NA	355	NA	NA	600	120	250
Washing basin		75%	350	225		300	350	550	200	NA	220	NA	NA	600	100	225
<b>Education NFIs</b>																
Exercise book	0%		50	45	65	45	50	45	50	55	55	NA	50	57.5	50	50
Pen/pencil	$\blacksquare$	20%	20	NA	22.5	23.75	30	NA	20	20	20	NA	20	25	30	20
Rubbers	0%		15	10	25	15	12.5	10	12.5	NA	15	NA	NA	30	15	15
Rulers	•	13%	35	35	50	23.75	35	NA	32.5	NA	25	NA	NA	50	15	35
Other																
Cooking oil <sup>8</sup>	_	7%	320	320	350	330	333.75	320	300	327.5	325	NA	350	260	300	330
Milk		10%	110	110	200	150	135	120	140	132.5	150	NA	NA	100	100	82.5
Eggs <sup>8</sup>	0%	1070	15	15	17	12	19	14	20	13.5	150	NA	NA	25	15	13
Salt	076	14%	40	25	35	50	40	35	50	30	35	NA	45	60	30	35
Sugar		4%	145	150									_	145		

<sup>6.</sup> The blank spaces represent item that are not part of the basket in that region.

<sup>9.</sup> In April 2025, data was not collected in CentralEthiopia due to unavailability of data collection partners. Additionally, vegetables were not assessed in South Ethiopia, and education items were only partially covered in Haran.





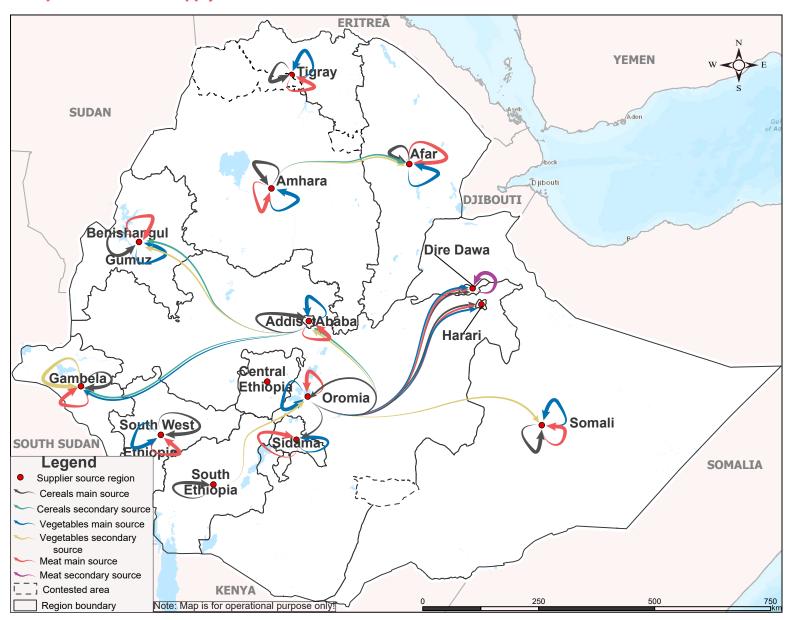


<sup>7.</sup> The 'NA' means data for certain items prices is not available for this month.

<sup>8.</sup> These items are included in the JMMI basket. The remaining items are monitored monthly, but not included in the basket.

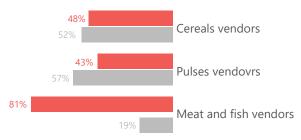
### SUPPLY CHAIN AND MARKET ACCESSIBILITY

**Map 4: Food Items Supply Route** 



# LOCATION OF MAIN SUPPLIERS FOR FOOD ITEMS

Location of main suppliers of food items, by vendor type:



Yes, suppliers are located in the same marketplace
No, suppliers are located outside of the marketplace

### **Key Findings**

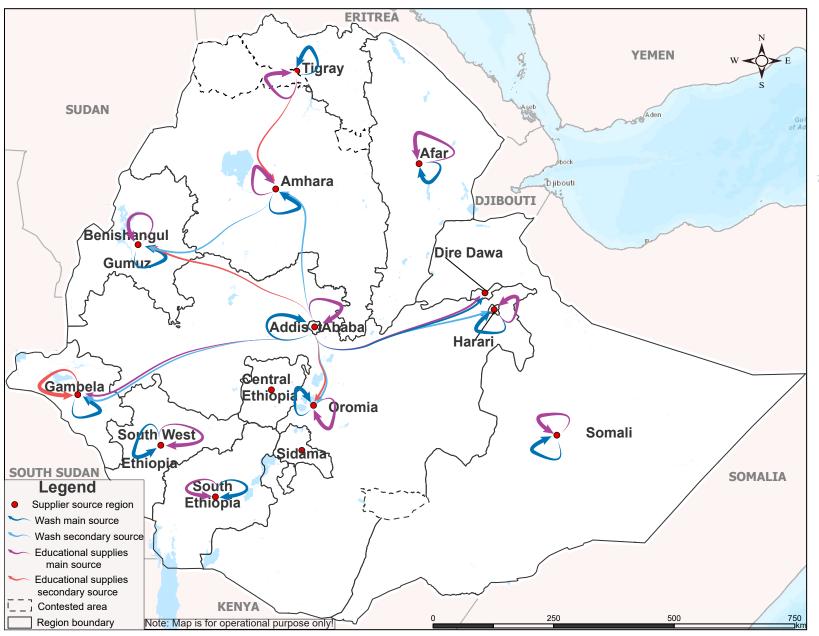
- In April 2025, 70% of the assessed meat vendors in Dire Dawa reported that their main suppliers were located in Oromia.
- During the same month, 25% of cereal vendors in Afar reported sourcing from Amhara. In Dire Dawa and Sidama, all interviewed vendors sourced cereals from Addis Ababa, while 38% and 15% of the assessed vendors in Gambela and Benishangul Gumuz, respectively, also received cereals from Addis Ababa. Additionally, 46% of the interviewed vendors in Addis Ababa reported sourcing cereals from Oromia.







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# LOCATION OF MAIN SUPPLIERS FOR NON-FOOD ITEMS

Location of main suppliers of NFIs, by vendor type:



Yes, suppliers are located in the same marketplaceNo, suppliers are located outside of the marketplace

### **Key Findings**

- Iln April 2025, all (100%) of the assessed vendors in Dire Dawa reported receiving educational items from Addis Ababa. Similarly, 53% of vendors in Gambela sourced educational items from Addis Ababa. Additionally, 38% of vendors in Oromia and 29% in Benishangul Gumuz reported the same.
- During the same month, all (100%) of the assessed vendors in Dire Dawa reported receiving WASH items from Addis Ababa. In addition, 86% of vendors in Oromia, 53% in Gambela, and 40% in Amhara reported sourcing their WASH items from suppliers based in Addis Ababa.



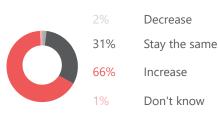




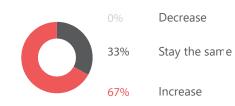
# **VENDOR AND CUSTOMER DYNAMICS, PREDICTED PRICE CHANGES AND MARKET ACCESS**

# REPORTED PREDICTED CHANGE IN PRICE OF FOOD AND NON-**FOOD ITEMS**

% of vendors reporting predicted price changes for food items in the 30 days following data collection:

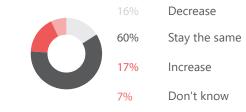


% of vendors reporting predicted price changes for NFIs in the 30 days following data collection:

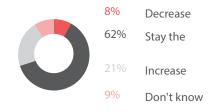


# **CHANGE IN NUMBER OF CUSTOMERS AND VENDORS**

Proportion of vendors reporting perceived changes in the number of customers coming to their shop as compared to previous month:



Proportion of vendors reporting perceived changes in the number of active traders in their marketplace as compared to previous month:



# **BARRIERS TO MARKET ACCESS FOR CUSTOMERS**

Customer groups that were reported to have faced difficulties visiting markets in the 30 days prior to data collection, by proportion of vendors (e.g., due to movement restrictions)<sup>10</sup>:

- 51% Children
- 51% Women
- 38% Chronically ill people

Proportion of the vendors reporting having observed or heard of any safety or security incidents in their market place in the 30 days prior to data collection<sup>10</sup>:

- Fear of robbery
- Fear of looting
- Curfew
- Fear of violence

Out of those vendors predicting an increase in food prices, the most frequently cited reasons were 10:

Rising exchange rate

Customers demanding more of these items

Unstable market

Out of those vendors predicting an increase in non-food item prices, the most frequently cited reasons were 10:

Rising exchange rate 74%

Customers demanding more of 24% these items

19% Unstable market

### DIFFICULTIES IN MEETING DEMAND AND TRANSPORTING OR PROCURING

**30%** (n=35) of cereals vendors reported **10%** (n=6) of meat and fish vendors having faced difficulties obtaining enough cereal items to meet demand in the 30 days prior to data collection.

The main reasons cited by the vendors were<sup>10</sup>:

- Producers producing less (37%)
- Domestic transport restriction (37%)
- Transport shortage (37%)

reported having faced difficulties obtaining enough meat and fish to meet demand in the 30 days prior to data collection.

The main reasons cited by the vendors were10:

- Not enough money (73%)
- Producers producing less (13%)
- Increased demand (13%)

22% (n=19) of vegetables vendors reported having faced difficulties obtaining enough vegetables to meet demand in the 30 days prior to data collection.

The main reasons cited by the vendors were<sup>10</sup>:

- Increased demand (42%)
- Producers producing less (40%)
- Transport shortage (38%)

13% (n=3) of WASH items vendors reported having faced difficulties obtaining enough WASH items to meet demand in the 30 days prior to data collection.

The main reasons cited by the vendors were<sup>10</sup>:

- Not enough money (60%)
- Transport shortage (60%)
- Not enough credit (35%)







Table 3: Availability of Items in the Market, Available Stock and Time Needed to Restock in March 2025<sup>11</sup>

	-				
		Availability		Stock and	Restock
Item	Available (% Kls)	Limited Available	Not available	Days stock available	Days needed restock
Cereals					
Maize	66%	33%	1%	15	5
Sorghum	46%	43%	6%	15	4
Teff	57%	35%	6%	15	5
Wheat	43%	42%	10%	15	5
Barley	17%	50%	33%	18	15
Enset	29%	14%	57%	2	1
Rice	94%	6%	0%	15	5
Pulses				.,	
Garden peas	69%	28%	3%	14	3
Faba beans	65%	29%	4%	15	2
Lentils	68%	26%	5%	14	3
Meat and Fish					
Beef	60%	32%	8%	2	1
Goat meat	94%	6%	0%	1	1
Camel meat	83%	15%	2%	1	1
Dry fish	64%	36%	0%	10	2
Vegetables					
Green leafy	55%	22%	19%	2	2
Tomatoes	84%	16%	0%	3	2
Onions	85%	13%	0%	5	2
Potatoes	74%	25%	1%	5	3
Okra	90%	10%	0%	2	1
WASH					
Bath soap	88%	12%	0%	16	3
Laundry soap	88%	10%	1%	15	3
Sanitary pads	66%	19%	10%	15	3
Water purification	31%	39%	28%	20	8
Shelter					
Plastic bucket	77%	21%	1%	21	4
Washing basin	77%	17%	1%	19	3
Education					
Exercise book	83%	17%	0%	33	4
Pen/pencil	88%	12%	0%	33	2
Rubber	52%	26%	13%	30	3
Ruler	49%	29%	13%	30	2
Other					
Cooking oil	72%	28%	0%	15	4
Milk	77%	23%	0%	1	1
Egg	85%	15%	0%	5	2
Salt	80%	16%	2%	19	3
Sugar	100%	0%	0%	16	4

- Sugar (100%), okra (90%), bath soap (88%), laundry soap (88%), and onions (85%) had the highest availability rates in April 2025.
- The highest rates of limited availability were reported for barley (50%), sorghum (43%), and water purification items (39%).
- Enset, barley, and water purification items were reported to have the highest unavailability rates at 57%, 33%, and 28%, respectively.







**Key Findings** 

<sup>11.</sup> Red numbers in this table indicate the percentage of KIs reporting the unavailability of items in the market.

### Methodology

JMMI data is collected in the form of key informant interviews (KIIs), with retailers in target markets serving as the key informants (KIs). KIs were asked for information encompassing the 30 days prior to data collection. Findings represent KIs' understanding of the situation in their markets and therefore are indicative only.

A woreda's largest urban marketplace(s) devoted to retail is/are prioritised for data collection, with expansion to rural areas depending on the availability of contributing partners. For the purposes of the Ethiopia JMMI, a market place is defined as an area with a relatively sizable concentration of traders in close proximity to each other. Within each target market place, field teams are responsible for identifying a sufficient number of traders to interview those who sell directly to consumers, who sell at least one item of that region's JMMI Basket and who are patronised by average consumers in the area. Field teams aim to collect a minimum of three prices per assessed item per assessed woreda.

Once data has been collected, it is uploaded to a secure KoBo server for cleaning and analysis. As the data is collected at the KI level, the following steps are undertaken to aggregate the trader level data to the location level:

- Availability is defined categorically (available, limited, unavailable) for each item
- Commodity prices and stock levels are collected from individual traders and median prices/stock levels are calculated for each item within each assessed woreda
- National and regional medians are then calculated using a "median of medians" approach, i.e. by calculating a new median from all woreda-level medians
- All vendors are asked about their ability to restock and whether a trader has restocked in the last month. If any given trader

states they are able to restock an item or, if at least one trader restocked in the last month, respectively, then those abilities are assumed for that woreda.

Data collection for this round took place between 31 March - 14 April 2025. In April 2025, 28 of the Ethiopia Cash Working Group (CWG) JMMI partners conducted a total of 756 KIIs. This round covered 235 marketplaces, which were sampled by partners nationwide based on their access and existing areas of intervention. This round includes 106 out of 1142 woredas in Ethiopia.

### **Challenges and limitations**

- The Central Ethiopia was not assessed due to the unavailability of data collection partners.
- In April 2025, prices for pulses, WASH NFIs, shelter NFIs, education NFIs, and other items were not collected in the Sidama region. Additionally, vegetables were not assessed in South Ethiopia, and education items were only partially covered in Harari. These factors likely affected the monthly price changes reported in Tables 1 and 2.
- All findings are indicative and not statistically generalisable at any level.

# **Participating agencies**

- ACF Action Contre le Faim
- AAE Action Aid Ethiopia
- ACTED Agency for Technical Cooperation and Development
- Ayuda en Acción Ethiopia
- CARE
- Caritas Switzerland
- CIFA ETS Centro Internazionale per L'Infanzia e la Famiglia ETS
- Concern
- DCA Danish Church Aid

### **About the CWG**

The Ethiopia Cash Working Group (ECWG) is a forum of technical professionals dedicated to enhancing the quality of CVA. Established in 2016, the ECWG serves as an inter-agency and inter-sectoral platform providing strategic and technical support on cash programming across sectors and clusters, social-protection mechanisms and development and resilience-based response. The CWGs support includes both technical functions that focus on process and strategic functions that focus more on results and impact.

- EECMY DASSC The Ethiopian Evangelical Church Mekane Yesus-Development and Social Services Commission
- ERCS Ethiopian Red Cross Society
- FH Food for the Hungry Ethiopia
- GOAL
- GPDI Gayo Pastoral Development Initiative
- IRC International Rescue Committee
- IRE Islamic Relief Ethiopia
- LWF Lutheran World Federation
- NRC Norwegian Refugee Council
- Oxfam GB
- PC Pastoralist Concern
- PiN Poeple in Need
- Plan International
- RHSPDO Renaissance for Health and Socioeconomic Progress Development Organization
- SCI Save the Children
- · Self Help Africa
- UNICEF
- WHH WeltHungerHilfe
- WVI World Vision International

28	Participating agencies
13	Assessed regions
106	Assessed woredas
756	Key informant interviews (KIIs)
36	Commodities assessed

### **About REACH**

REACH facilitates the development of information tools and products that enhance the capacity of aid actors to make evidence-based decisions in emergency, recovery and development contexts. The methodologies used by REACH include primary data collection and in-depth analysis, and all activities are conducted through inter-agency aid coordination mechanisms. REACH is a joint initiative of IMPACT Initiatives, ACTED and the United Nations Institute for Training and Research - Operational Satellite Applications Programme (UNITAR-UNOSAT). For more information, please visit our website. You can contact us directly at geneva@reachinitiative.org and follow us on Twitter @ REACH info.

All the Ethiopia JMMI and other assessment outputs, including factsheets and datasets, are openly available on the REACH Resource Centre.

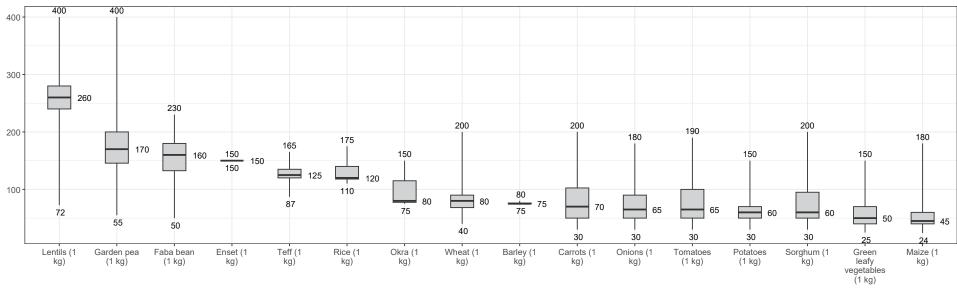




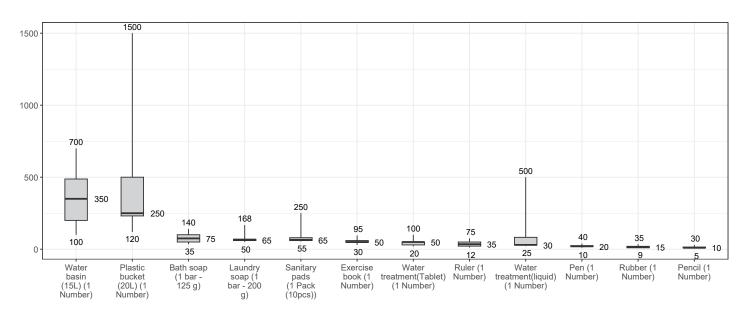


### **ANNEX 1: Distribution of Prices**

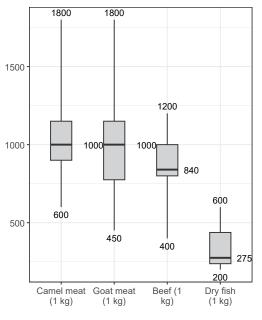
### **Food Items**



### **NFIs**



### **Meat and Fish Items**









### **Other Food Items**

