

Kenya | Joint Market Monitoring Initiative (JMMI)

Q4 2025 (October - December)

INTRODUCTION

The Kenya Joint Market Monitoring Initiative (JMMI) was established under the guidance of the Kenya Cash Working Group (KCWG). Since June 2022, the JMMI has been conducted quarterly, using standardised methods in collaboration with the KCWG. The JMMI provides regular data on market prices and enables informed decision-making for cash-based interventions and facilitates a deeper understanding of market dynamics across Kenya's arid and semi-arid land (ASAL) counties.

According to the National Drought Management Authority (NDMA) drought situation update for January 2026, Mandera and Wajir counties were categorized under the Alarm drought phase while 13 counties including Turkana, Isiolo, and Marsabit were classified under the Alert drought phase due to the performance of the October–November–December (OND) 2025 rainy season. The OND 2025 rainy season was reportedly among the driest on record, with cumulative rainfall levels significantly below the long-term average.^{4,5}

Data collection for Q4 2025 was conducted between 22nd December 2025 and 11th January 2026. This factsheet presents an overview of median prices and availability of essential food and non-food items (NFIs) in the assessed counties, along with an update on the cost of the Minimum Expenditure Basket (MEB)¹ in these areas. Additionally, it offers insights into supply chains and vendors' market perceptions.

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

Q4 2025 ASAL COVERAGE

250	Vendors interviewed
40	Markets assessed
34	Commodities assessed
10	Participating agencies
7	Counties assessed

KEY INDICATORS

Cost of Food MEB ¹	Cost of Non-Food MEB ¹	Cost of MEB ¹
14,513 KES	5,509 KES	20,021 KES
111.89 USD ²	42.47 USD ²	154.35 USD ²
▼ 826 KES (5%) ³	▲ 235 KES (4%) ³	▼ 591 KES (3%) ³

ASSESSED COUNTIES AND MEDIAN TOTAL MEB VALUES

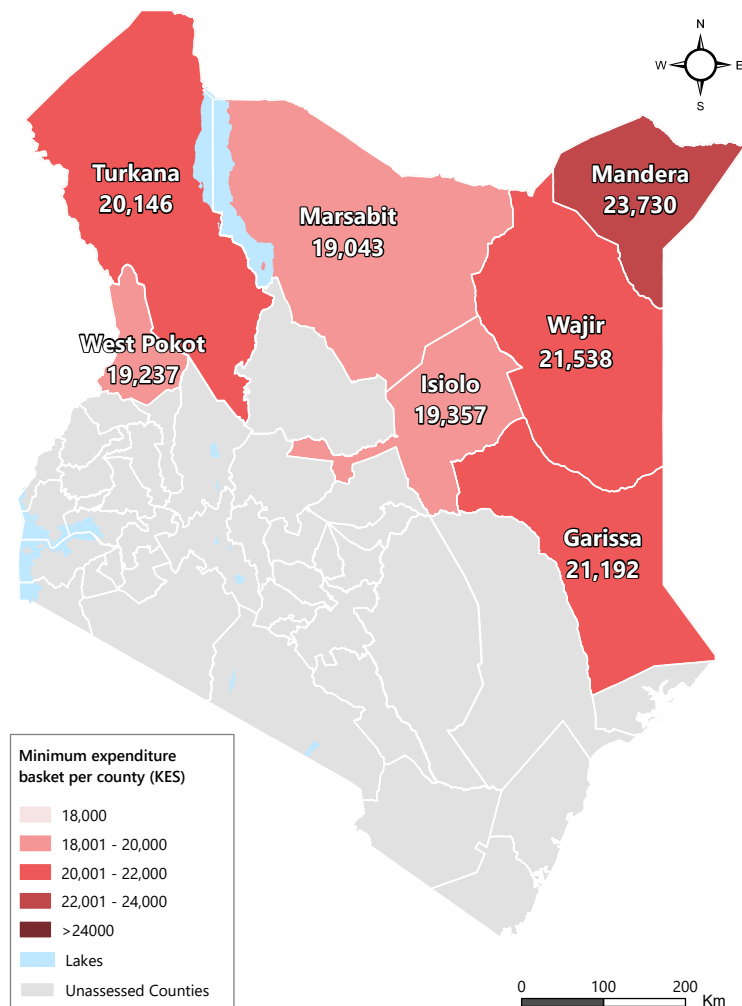


Figure 1: Map of the Q4 2025 assessed counties and MEB values

KEY FINDINGS

- **Despite the decline in the food MEB¹ between September and December 2025, the NFI MEB increased,** driven largely by education and water-related costs, indicating a gradual shift in expenditure pressure beyond food.
- Overall, findings indicate structural supply resilience such as stable stock levels, multiple suppliers, and generally good market access. However, a majority (80%) of vendors reported facing various challenges, including a lack of funds and rising supplier prices.
- While most commodities were physically available, household (HH) purchasing power emerged as the primary barrier to market access across assessed counties. More than half of vendors (56%) reported financial challenges affecting customers, reinforcing **previous quarter** findings that economic access rather than physical availability is the dominant constraint limiting HH access to essential goods.
- **Out of the 40 markets assessed, 20% were classified as fully functional, 50% as having limited functionality, and 28% as having poor functionality.** This highlights ongoing challenges in market operations and underscores the dynamic nature of market functionality across the assessed counties.

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/>

RURAL MINIMUM EXPENDITURE BASKET (MEB)

The MEB comprises essential commodities and services, representing the average monthly cost for a six-person household to meet its culturally adjusted basic needs. The Rural MEB serves as a financial proxy for these requirements.

Only the key components of the MEB i.e. food and NFIs as defined by the KCWG were used to compute the MEB. The MEB also includes fixed costs that account for essential household expenditures.

Food Items	Quantity
Maize flour	32.25 Kg
Rice	22.5 Kg
Cowpeas	7.5 Kg
Vegetable Oil	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

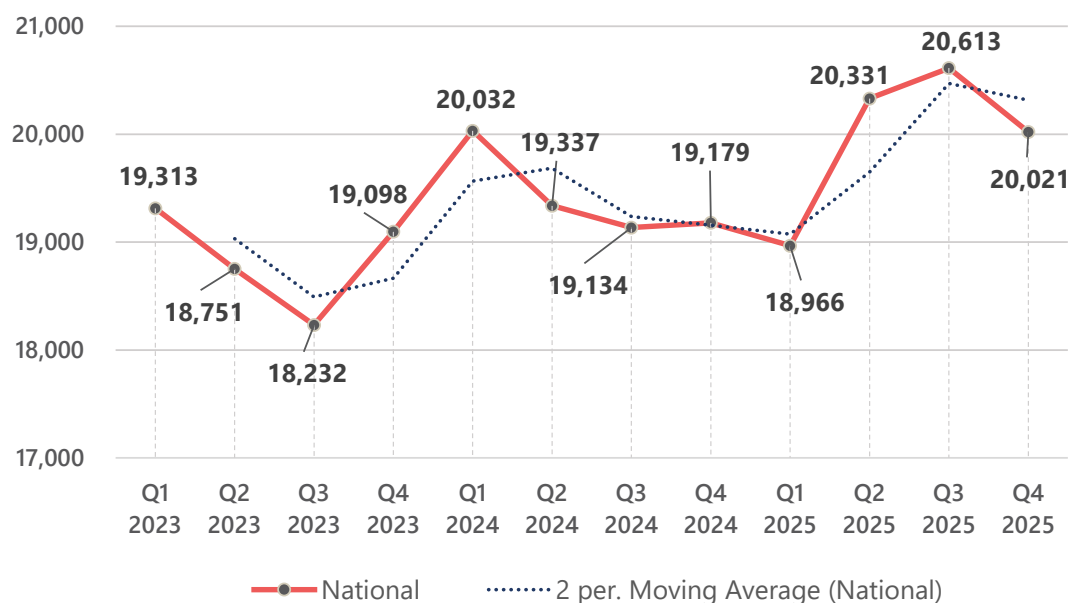
Non-Food Items	Quantity
Water	1,125 L
Multipurpose soap	2.2 Kg
Toothpaste	0.425 L
Sanitary pads	2 packs of 8
Education (pen, pencil, book, rubber, sharpener)	2 stationary kits
Charcoal	12 Kg
Solar Lamp	1 piece
National Health Coverage	500 KES
Communication (Airtime)	300 KES
Public transport	200 KES

COST OF THE MEB IN KES AND CHANGE SINCE Q3 2025

County	MEB	Change	Food MEB	Change	NFI MEB	Change
Mandera**	23,730	▲ 4%	16,504	▼ 2%	7,226	▲ 21%
Wajir	21,538	▼ 1%	16,863	0%	4,676	▼ 7%
Garissa*	21,192		15,460		5,732	
Turkana**	20,146	▼ 5%	14,144	▼ 13%	6,003	▲ 20%
Isiolo*	19,357		13,430		5,927	
West Pokot	19,237	▼ 13%	14,513	▼ 7%	4,724	▼ 26%
Marsabit	19,043	▼ 5%	13,379	▼ 9%	5,664	▼ 7%

* No MEB evolution data has been reported due to the absence of data collection in Garissa and Isiolo counties during the previous round (Q3 2025).

EVOLUTION OF THE RURAL MEB (KES) OVER TIME



The rural MEB has exhibited fluctuating trends over time, with the MEB cost peaking in Q3 2025, before declining slightly in Q4 2025. Despite this, the Overall MEB increased by 4% over a 12 month period, compared to Q4 2024, driven by increase in both the Food MEB (+5%) and NFI MEB (+12%). Declining purchasing power, coupled with persistently high food prices, continues to constrain households' ability to meet their basic needs, particularly in vulnerable ASAL counties.

Q4 2025 MEB TAKEAWAYS

- Compared to Q3 2025 the cost of both the full MEB (-3%) and the food MEB (-5%) declined, a trend observed across most assessed counties and likely driven by seasonal factors. In contrast, the NFI MEB increased by 4%, primarily due to higher education related costs associated with the start of the new academic year and resumption of schooling as the period of data collection extended into January.
- Mandera County recorded the only overall MEB increase (+4%), largely driven by the rise in the NFI component, particularly the cost of water refilling, which increased from 10 KES to 50 KES. In Mandera, where approximately 42% of water supply comes from borehole-sourced groundwater and the only river is seasonal and unreliable, reliance on distant water points and high temperatures is increasing HH vulnerability, straining fragile pastoral livelihoods and likely deepening humanitarian needs as climate-driven water scarcity worsens.⁶
- Meanwhile, Wajir County reported the highest food MEB and is among the counties that deteriorated from Alert to Alarm drought phase classification. This worsening drought context continues to strain HH purchasing power and limit access to adequate food, thereby exacerbating food insecurity risks.

FOOD AND NFI PRICE COMPARISON

- According to the Kenya National Bureau of Statistics (KNBS), annual inflation in December 2025 stood at 4.5%, unchanged from November 2025. While overall inflation remained stable, the report noted mixed price movements within the food basket, including increases in selected vegetables such as kales (+4.7%) and potatoes (+2.9%), alongside decreases in the prices of sugar (-1.5%) and cooking oil (-0.7%).⁷
- Compared to the previous quarter, most monitored NFIs remained stable or recorded price decreases. The price increases were observed in pens (+67%) and exercise books (+33%), likely driven by supply-and-demand dynamics. Charcoal prices increased (+33%), highlighting rising household energy costs.

** Charcoal prices for Turkana and traditional vegetables for Mandera are based on national median price due to missing prices during the Q4 2025 assessment.

Items	Overall median cost	Change	Garissa	Isiolo	Mandera	Marsabit	Turkana	Wajir	West Pokot
White maize (1 Kg)	80	0%	100	80	100	80	80	70	50
Maize flour (1 Kg)	100	0%	100	100	100	120	100	100	65
Wheat flour (1 Kg)	100	0%	100	80	100	100	110	120	100
Rice (1 Kg)	140	0%	160	120	150	130	120	130	140
Beans (1 Kg)	140	▼ 7%	140	100	200	100	150	160	140
Cowpeas (1 Kg)	130	▼ 7%	145	100	150	115	200	120	250
Pigeon peas (1 Kg)	120	▼ 29%	150	100	*	140	*	100	250
Tea leaves (50 g)	30	▲ 20%	50	30	30	30	25	27.5	20
Cattle milk (1 L)	146	▼ 9%	160	140	200	100	110	240	160
Vegetable oil (1 L)	280	▼ 7%	300	240	225	240	280	300	300
Salt (200 g)	20	▲ 33%	20	20	20	15	15	20	15
Sugar (1 Kg)	140	▼ 13%	130	160	130	140	190	150	180
Onions (1 Kg)	100	▼ 23%	120	80	100	90	125	80	100
Tomatoes (1 Kg)	100	0%	85	80	100	100	100	110	90
Kale (1 Kg)	80	▼ 20%	70	100	100	80	100	100	60
Spinach (1 Kg)	90	▼ 10%	80	80	100	100	100	70	70
Traditional vegetables (1 Kg)	80	0%	80	100	**	80	90	120	65
Cabbage (500 g)	100	0%	100	100	100	120	125	100	90
Soap (120 g)	50	0%	50	50	50	50	35	50	40
Sanitary pads (8 pack)	100	0%	100	120	100	100	100	100	100
Toothpaste (35 ml)	50	0%	70	70	50	50	50	50	42.5
Jerry can (20 L)	180	▼ 10%	150	200	300	140	200	180	150
Bucket (20 L)	200	▼ 16%	200	250	175	200	150	250	280
Solar lamp (1 pc)	525	▼ 13%	500	900	500	875	500	550	600
Refill Liquefied Petroleum Gas (LPG 6 Kg)	1,250	▼ 7%	900	1,250	*	1,200	1,350	*	1,500
Firewood (1 bundle)	100	▼ 50%	150	75	150	60	*	100	200
Charcoal (2 Kg)	150	▲ 50%	150	200	150	125	**	120	50
Kerosene (1 L)	180	▼ 18%	180	100	150	245	*	*	*
Pen (1 pc)	20	▲ 67%	10	20	20	10	12.5	20	12.50
Pencil (1 pc)	10	0%	10	10	10	10	10	10	10
Rubber (1 pc)	10	0%	10	22.5	10	5	10	5	10
Exercise book (1 pc)	20	▲ 33%	30	30	25	15	20	25	20
Sharpener (1 pc)	10	0%	10	20	10	10	22.5	5	17.5
Water refill from a tap stand or borehole (20 L)	20	0%	20	8	50	20	35	7.5	20

* No price data collected as a result of the unavailability of the respective commodity at the time of data collection.

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

Items ⁸	Number of KIs interviewed per item	Wide availability (% KIs)	Limited availability (% KIs)	Complete unavailability (% KIs)	Items	Remaining stock (days)	Time needed to restock (days)
White maize (1 Kg)	84	60%	40%	0%	White maize (1 Kg)	7	2
Maize flour (1 Kg)	122	72%	27%	0%	Maize flour (1 Kg)	9	2
Wheat flour (1 Kg)	111	76%	24%	0%	Wheat flour (1 Kg)	10	2
Rice (1 Kg)	132	83%	17%	0%	Rice (1 Kg)	10	2
Beans (1 Kg)	137	77%	23%	0%	Beans (1 Kg)	10	2
Cowpeas (1 Kg)	40	39%	49%	10%	Cowpeas (1 Kg)	8	5
Pigeon peas (1 Kg)	30	33%	53%	11%	Pigeon peas (1 Kg)	7	6
Tea leaves (50 g)	84	80%	20%	0%	Tea leaves (50 g)	12	2
Cattle milk (1 L)	42	45%	46%	8%	Cattle milk (1 L)	3	1
Vegetable oil (1 L)	113	78%	22%	0%	Vegetable oil (1 L)	10	2
Salt (200 g)	136	84%	16%	0%	Salt (200 g)	14	2
Sugar (1 Kg)	135	84%	16%	0%	Sugar (1 Kg)	10	2
Onions (1 Kg)	66	64%	36%	0%	Onions (1 Kg)	5	2
Tomatoes (1 Kg)	69	62%	38%	0%	Tomatoes (1 Kg)	4	2
Kale (1 Kg)	50	42%	58%	0%	Kale (1 Kg)	2	2
Spinach (1 Kg)	46	36%	62%	0%	Spinach (1 Kg)	2	1
Traditional vegetables (1 Kg)	21	29%	57%	13%	Traditional vegetables (1 Kg)	2	1
Cabbage (500 g)	68	51%	49%	0%	Cabbage (500 g)	3	2
Soap (120 g)	104	78%	21%	0%	Soap (120 g)	12	2
Sanitary pads (8 pack)	77	73%	27%	0%	Sanitary pads (8 pack)	10	2
Toothpaste (35 ml)	83	72%	27%	0%	Toothpaste (35 ml)	14	2
Jerry can (20 L)	71	67%	33%	0%	Jerry can (20 L)	14	2
Bucket (20 L)	46	68%	30%	0%	Bucket (20 L)	10	2
Solar lamp (1 pc)	36	49%	50%	0%	Solar lamp (1 pc)	21	5
Refill Liquefied Petroleum Gas (LPG 6 Kg)	18	31%	55%	12%	Refill (LPG 6 Kg)	17	3
Firewood (1 bundle)	30	57%	43%	0%	Firewood (1 bundle)	5	2
Charcoal (2 Kg)	43	51%	47%	0%	Charcoal (2 Kg)	10	2
Kerosene (1 L)	21	25%	57%	6%	Kerosene (1 L)	10	2
Pen (1 pc)	89	78%	22%	0%	Pen (1 pc)	16	2
Pencil (1 pc)	90	76%	24%	0%	Pencil (1 pc)	14	2
Rubber (1 pc)	61	66%	33%	1%	Rubber (1 pc)	10	2
Exercise book (1 pc)	88	76%	23%	0%	Exercise book (1 pc)	14	2
Sharpener (1 pc)	63	68%	30%	2%	Sharpener (1 pc)	14	2
Water refill from a tap stand or borehole (20 L)	41	56%	44%	0%	Water refill from a tap stand or borehole (20 L)	*	*

Over a third (43%) of vendors self-reported limited or no availability of some commodities. Vegetables, including spinach (62%), kale (58%), and traditional vegetables (57%), were among the food items for which a higher proportion of vendors self-reported limited availability.

Pigeon peas (11%) and cowpeas (10%) had the highest proportion of vendors self-reporting complete unavailability of the commodity in the markets. As a result, the absence of vendors selling pigeon peas and traditional vegetables led to gaps in price data in Mandera and Turkana counties. This is likely due to local dietary preferences or seasonality of the produce, in the specific case of leafy vegetables.

Among the NFIs, sources of energy, such as kerosene (57%), LPG cooking gas (55%) and solar lamps (50%), were found to have the highest proportion of interviewed vendors reporting limited availability within the market at the time of data collection.

Overall, the findings indicated strong supply chains with adequate stock levels for most commodities. Staple foods and consumable NFIs show stable stock availability and quick restocking turnover. As expected, only perishable vegetables exhibit low stock levels, reflecting possible higher sensitivity to supply disruptions. Additionally, energy items particularly solar lamp and cooking gas recorded slightly delayed restocking times compared to the other NFI assessed commodities. This may be due to the nature of these items, as they have different sourcing or transportation needs that can lead to longer restocking times.

* No information regarding the remaining stock days and the time needed to restock was collected.

MAIN SUPPLY ROUTES

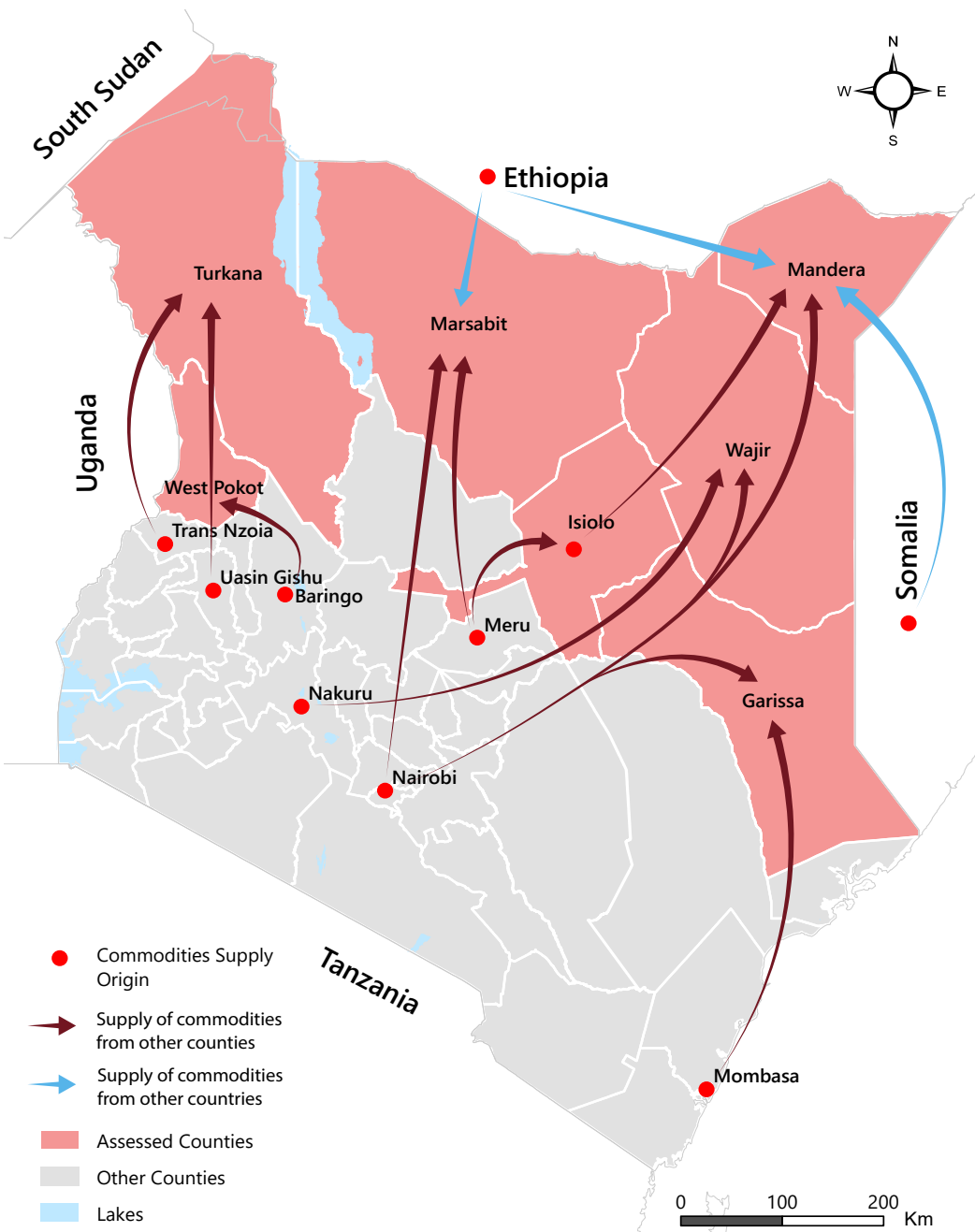


Figure 2: Map of main supply route of assessed counties

*This is a self-reported question to the vendors hence may be subjectivity to their experience, knowledge and awareness

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.

The majority (94%) reported that their main suppliers were located within Kenya, primarily within their respective counties, followed by neighbouring counties. Notably, NFIs were reportedly sourced from major urban hubs, such as Nairobi and Mombasa, indicating possible reliance on established wholesale and distribution centres. Meanwhile, food commodities were reportedly sourced from key agricultural production areas, including Meru and Nakuru counties.⁹

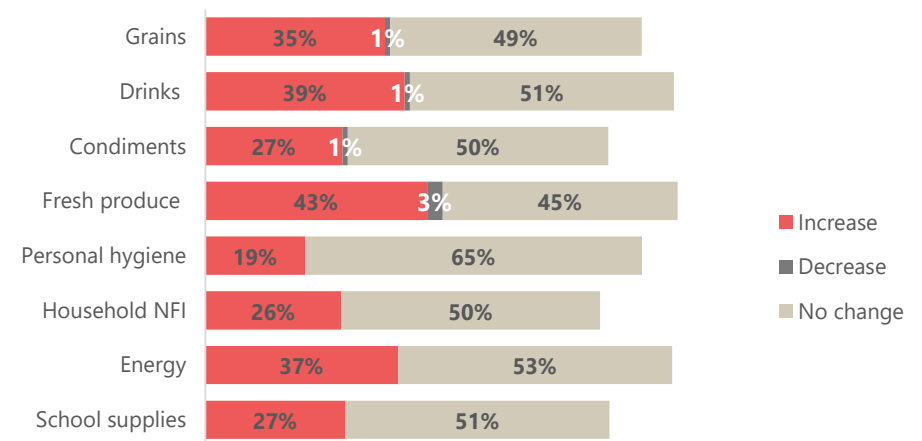
Findings further indicate limited reliance on cross-border trade, with only a few vendors (n=15)¹⁰ reporting sourcing grains, condiments, and NFIs from neighbouring countries such as Ethiopia, and Somalia, and these vendors were exclusively located in counties bordering those countries.

REPORTED PREDICTED CHANGES IN SUPPLIERS' PRICES

A considerable proportion of vendors anticipated price increases, particularly for fresh produce (43%) and energy (37%). The most commonly cited reasons for these expected increases were higher demand for the commodities, taxation and increase in exchange rate, which may have a direct or multiplicative effect on prices.

Close to half (43%) of interviewed vendors reported being unable to predict price changes for popular commodities one month ahead of data collection, citing the frequent and unpredictable fluctuations in commodity prices. This high level of price uncertainty contributes to increased market volatility, potentially limiting households' ability to anticipate and cope with future expenditure needs.

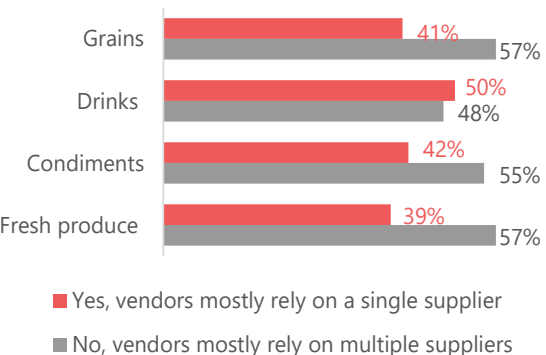
Expectation of supplier price changes one month following data collection, by % of vendors who reported being able to predict supplier price changes by category:^{8*}



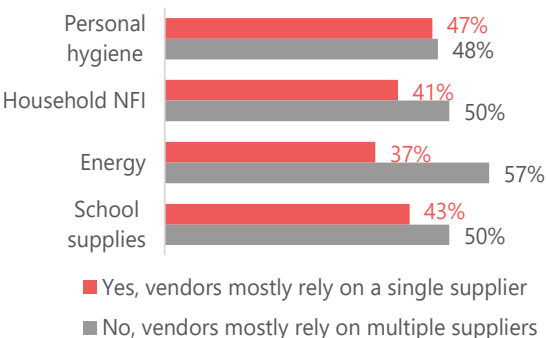
SUPPLIER



% of vendors reporting that they mostly relied on a single supplier for food items at the time of data collection, by category:⁸



% of vendors reporting that they mostly relied on a single supplier for non-food items at the time of data collection, by category:⁸

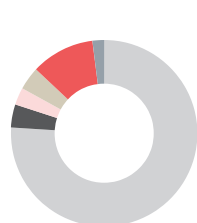


At the time of data collection, most interviewed vendors reported sourcing from multiple suppliers, which may reduce the risk of shortages and price shocks. However, across both categories, a notable share of vendors (roughly 37–50%) reported depending mostly on a single supplier which indicates a notable level of vulnerability to supply disruptions.

ACCESS TO A LOCKED, SECURED STORAGE FACILITY

In the 3 months prior to data collection, more than three-quarters (80%) of the vendors reported having access to a locked or secure storage facility within the marketplace. A small proportion (3%) of vendors had storage facilities located outside the marketplace or at their homes. Access to a secure storage facility provides several benefits, including reducing the risk of theft and damage from environmental factors. Conversely, some (11%) 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:



- 76% Yes, storage within own business facility
- 4% Yes, storage elsewhere within the marketplace
- 3% No, storage outside the marketplace at another facility
- 4% No, storage at home
- 11% No storage facility
- 2% Prefer not to answer

CHALLENGES FACED BY VENDORS

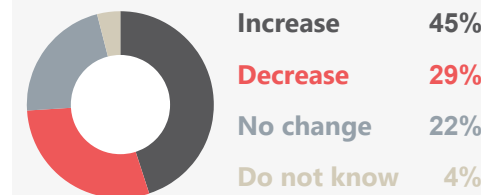
Most reported challenges faced in the 3 months prior to data collection, by % of all interviewed vendors by gender:¹¹



A majority (80%) of vendors reportedly faced vendor-related challenges, with lack of funds to restock (47%)¹¹ and price increases (36%)¹¹ being the most commonly cited issue overall. These challenges highlight the widespread financial stress and shrinking customer bases faced by vendors.

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:



% 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%)	54%
Few (11%-25%)	18%
Some (26%-50%)	13%
A lot (51%-75%)	7%
Most (76%-100%)	8%

Issues related to infrastructure damage within the marketplace were mostly reported in Mandera (23%), followed by Wajir and West Pokot (both at 20%). Furthermore, challenges related to insecurity in the area were more frequently reported by female vendors (15%) than by male vendors (10%).¹¹

Despite the reported challenges experienced, nearly half (45%) 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:¹¹

- 33%** Difficulty with price charged by supplier
- 15%** Difficulty with availability of core goods
- 10%** Unpaid market purchases made on credit
- 8%** Difficulty fully staffing the store

Among the interviewed vendors, 49% of women and 38% of men reported difficulties keeping their businesses operational and adequately stocked.

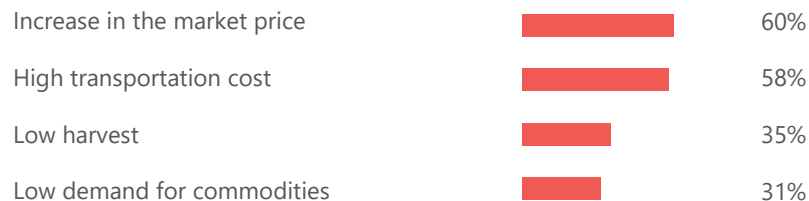
Despite these challenges, more than half (57%) of vendors indicated that they were not experiencing any operational difficulties at the time of data collection.

Restocking challenges were most commonly reported for household NFIs (41%), grains (38%), and fresh produce (34%). The primary reason cited was vendors reporting insufficient funds to purchase adequate stock for the household NFIs and grains. For fresh produce, difficulties were mainly attributed to reduced supplier output, likely reflecting poor seasonal yields.

Conversely, lower levels of restocking difficulty were reported for personal hygiene products (21%) and school supplies (10%), suggesting relatively more stable supply chains for these categories.

SHORTAGE OF COMMODITIES

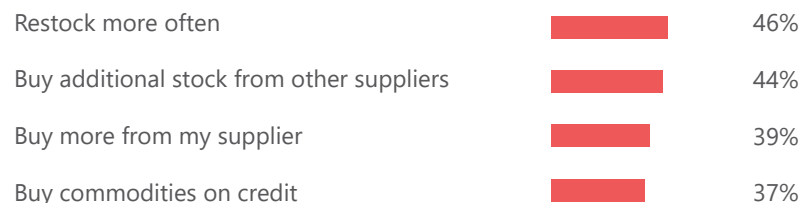
Most reported causes of shortages for commodities at the time of data collection, by % of vendors (43%) who reported experiencing shortages of some commodities:¹¹



Compared to the Q3 2025, the proportion of vendors who reported experiencing limited or complete unavailability of some commodities decreased (from 60% to 43%). Similar to the previous quarter, increases in market prices (60%)¹¹ and high transportation costs (58%)¹¹ were identified as contributing factors to these shortages. Additionally, low harvest (35%)¹¹ and reduced demand for commodities (31%)¹¹ was reported as contributors to this shortage. This is likely linked to the below-average rainfall and moisture deficits that have constrained crop production, while elevated fuel costs continue to drive transport expenses.⁵

COPING MECHANISMS EMPLOYED

Most reported strategies used by interviewed vendors to address unavailability of commodities at the time of data collection, by % of vendors (43%) who reported experiencing shortages of some commodities:¹¹



The primary method vendors used to cope with shortages was to restock more frequently, often by purchasing goods on credit or finding alternative suppliers. Additionally, increasing market prices was also reported by vendors in Isiolo (50%), Turkana (18%) and Wajir (13%). However, vulnerabilities remain, particularly among vendors in Turkana (9%) and Wajir (7%) who reported having no coping strategies in place. The lack of such mechanisms may expose these vendors to income losses or operational disruptions in the event of supply shocks.

CHALLENGES FACED WHEN TRANSPORTING COMMODITIES

Most reported transportation challenges in the 3 months prior to data collection, by % of all interviewed vendors:¹¹

- 53%** High cost of transport
- 33%** Distance is too far to cover on foot
- 25%** Unusable roads
- 20%** Vehicle/bicycle keeps breaking down

The KNBS report indicates upward pressure in fuel-related components over the year, which is likely contributing to increased transport costs, which remains a primary driver of rising commodity prices.⁷

Despite no change in fuel prices observed in December 2025 compared to the previous month, high cost of transportation emerged as the most frequently cited challenge by more than half (53%) of interviewed vendors across 6 out of the 7 assessed counties.⁷

More vendors (57%) relied on deliveries from suppliers while the remaining 42% sourced their commodities directly.

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

- 1** 92% Motor vehicles (Passenger cars, Tuk Tuk, Bus, Motorcycle, Boat, Van, Pickup, Truck, Lorry)
- 2** 2% Supplier delivers
- 3** 2% Carts

BARRIERS TO MARKET ACCESS

Physical barriers

Some (18%) of interviewed vendors reported facing issues with physically accessing the marketplace. Findings at county level highlight access constraints in Wajir (44%), Turkana (32%) followed by Mandera (27%). Among the interviewed vendors, 21% of women and 15% of men reported physical barriers to accessing marketplaces.

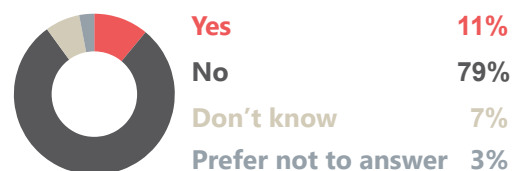
Most reported physical barriers to accessing the marketplace in the 3 months prior to data collection, by % of all interviewed vendors:¹¹

- 6% Limited transportation options
- 6% Limited operating hours of the market
- 4% Hazards or damage on roads
- 4% Inadequate facilities

Social barriers

Among the interviewed vendors, a higher proportion of women (19%) than men (12%) reported experiencing social barriers that discouraged people from visiting the marketplace. However, most vendors (71%) reported not experiencing any social barriers. In Wajir and West Pokot, none of the interviewed vendors reported any form of discrimination or exclusion.

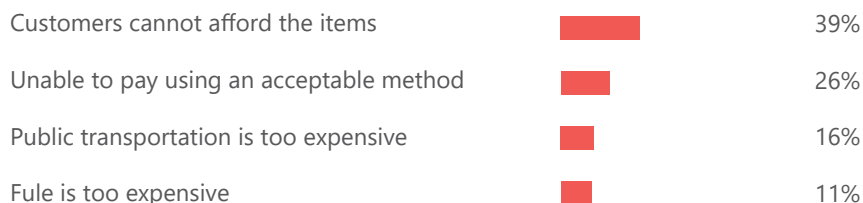
% of vendors reporting groups of people who sometimes avoided going to the marketplace in the 3 months prior to data collection due to discrimination, exclusion, or feeling unwelcome:



Financial barriers

More than half of interviewed vendors (56%) cited financial challenges affecting their customers, indicating that consumer purchasing power remains constrained and highlights the cost burden facing many HHs. The primary issue reported was customers' inability to afford available items, which emerged as the leading barrier across all assessed counties. This finding suggests that while essential commodities may be physically accessible and available in the market, the dominant barrier is affordability.

Most reported financial barriers to accessing the marketplace in the 3 months prior to data collection, by % of all interviewed vendors:¹¹



SECURITY ISSUES

Most reported security factors that negatively impacted businesses in the 3 months prior to data collection, by % of all interviewed vendors:¹¹



Among the interviewed vendors, 17% (19% women and 16% men) reported being affected by security-related issues, with fear of robbery and looting identified as the main concern, particularly in Turkana (45%), Marsabit and Wajir (both at 36%). The security situation in ASAL counties remains localized yet persistent, continuing to disrupt market access, humanitarian activities, and community resilience. These areas face recurrent insecurity, often stemming from intercommunal and cross-border tensions fueled by competition over scarce natural resources, such as pasture and water.

ACCEPTABLE MODE OF PAYMENT

Most reported accepted payment methods by vendors in the 3 months prior to data collection:¹¹

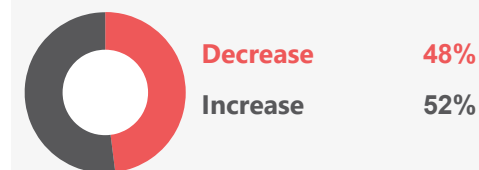
- 1 90% Cash (local currency)
- 2 85% Mobile money
- 3 14% Informal credit
- 3 9% Money transfers
- 5 7% Credit or Debit cards

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:



% 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 (57%) who reported a change:



MARKET FUNCTIONALITY SCORE (MFS)¹²

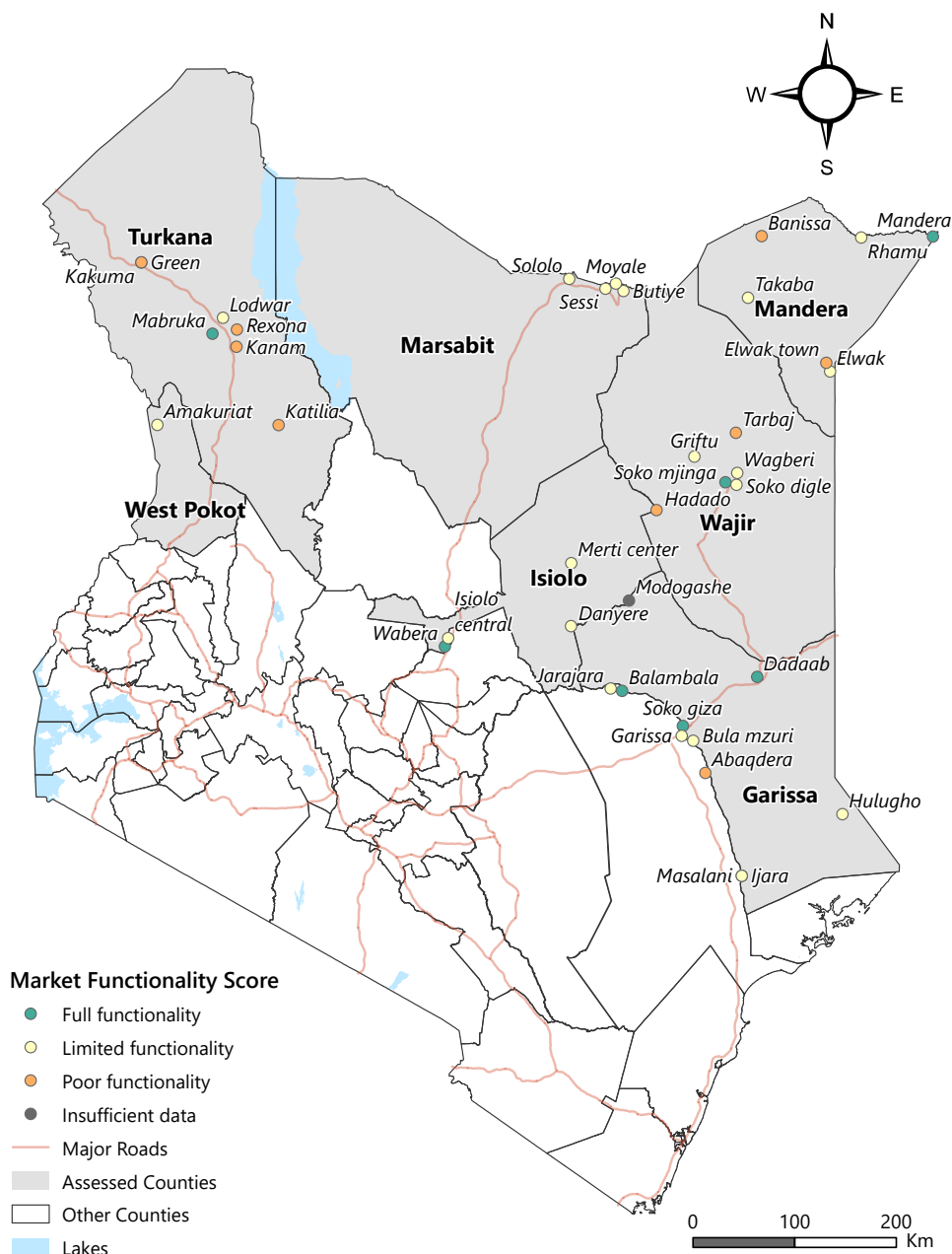


Figure 3: Map of market functionality of Q4 2025 assessed markets

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).¹² The MFS can be used to support humanitarian actors to design market-based interventions.

Among the 40 markets assessed, only one in five (20%) were found to be fully functional. Half (50%) demonstrated limited functionality, while more than a quarter (28%) were classified as having poor functionality, underscoring significant challenges in overall market performance. In Garissa County, 4 out of the 12 assessed markets were classified as fully functional, attributed to high levels of commodity availability, adequate physical and financial infrastructure, and safe market accessibility. Additionally, at least one market in each of Isiolo, Mandera, Turkana, and Wajir counties was found to be fully functional.

Affordability was the lowest-performing dimension, assessed through customers' financial access, and the predictability of commodity prices. More than two-thirds (68%) 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 more than half (56%) of interviewed vendors. The resilience dimension followed, highlighting challenges in maintaining supply chains and ensuring consistent stock availability. Conversely, the dimension with the highest overall performance was infrastructure, with all of the assessed markets achieving more than 50% of the maximum score within this dimension, indicating the physical and financial infrastructure in local markets are adequate to support trade.

Markets in remote ASAL areas, while serving local communities, may be characterised by a limited number of vendors, which may reflect a specific vulnerability rather than an indicator of broader market failure. Furthermore, 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, 250 vendors were interviewed as key informants. The interviews were conducted both face-to-face (95%) and remotely (5%) with vendors selling food and NFIs. Data was collected between 22nd December 2025 and 11th January 2026 across 40 markets in the 7 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.
- 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. In some cases, the estimation may not have been accurate.
- Lack of visual confirmation and potential response bias among the 5% of data collected remotely.
- Apart from Garissa County, not all sub-counties in the respective counties were assessed.
- Limited vendors interviewed in Isiolo (9), West Pokot (10), Marsabit (11) and Wajir (25) counties, which may limit the representativeness of findings for these areas.
- In West Pokot, only one market was assessed out of the 10 surveys conducted, hence may limit the representativeness of findings for the area.

Endnotes

- ¹ World Food Programme, [The Minimum Expenditure Basked \(MEB\) Analysis](#), July 2020.
- ² [1 USD-129.71 KES in December, 2025](#).
- ³ Change since the last round of JMMI data collection in September 2025 (Q3 2025).
- ⁴ NDMA, [National Drought Early Warning Bulletin](#), January 2026.
- ⁵ Famine Early Warning Systems Network (FEWS NET), [Food Security Outlook Update](#), December 2025.
- ⁶ ACAPS, [Anticipated impact of drought conditions in Mandera, Tana River, Turkana, and Wajir counties](#), Nov 2025
- ⁷ KNBS, [Consumer Price Indices and Inflation Rates](#), December 2025.
- ⁸ 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."
- ⁹ KNBS, [Gross County Product](#), December 2025.
- ¹⁰ Sample size (n) refers to the total number of respondents (in this case vendors) in the sample under study.
- ¹¹ For multiple answer questions, respondents could select multiple options hence the findings may exceed 100%.
- ¹² 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

