

Kenya | Joint Market Monitoring Initiative (JMMI)

Q1 (January - March, 2025)

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 March 2025 drought classification by the National Drought Management Authority (NDMA), the majority, 15 out of the 23 ASAL counties, were classified under the 'Normal' drought phase, while the remaining counties were in the 'Alert' phase.⁴ The March–April–May (MAM) 2025 long rains were poorly distributed across parts of the ASALs, leading to mixed crop performance. However, areas that received timely and adequate rainfall saw early harvests, rangeland regeneration and improved water availability, which helped ease market pressure.⁵

The data collection for Q1 2025 was conducted between the 22nd of March and 14th of April 2025. This factsheet presents an overview of **key foods and non-food items (NFIs) prices and cost of the MEB¹ 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](#).*

Q1 2025 ASAL COVERAGE

482 Vendors interviewed

48 Markets assessed

34 Commodities assessed

12 Participating agencies

8 Counties assessed

KEY INDICATORS

Cost of Food MEB¹

12,031 KES

92.91 USD²

▼ 1,786 KES (13%)³

Cost of Non-Food MEB¹

5,483 KES

42.34 USD²

▲ 585 KES (12%)³

Cost of MEB¹

17,485 KES

135.03 USD²

▼ 1,695 KES (9%)³

ASSESSED COUNTIES AND MEDIAN TOTAL MEB VALUES

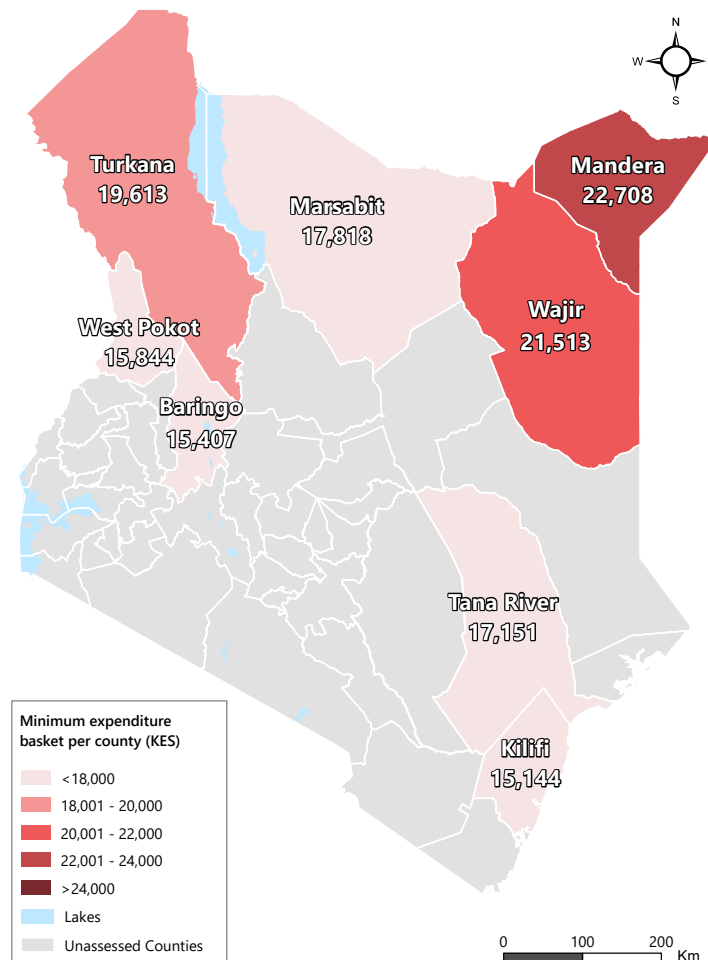


Figure 1: Map on the Q1 2025 assessed counties and MEB values

MARKET OVERVIEW

KEY FINDINGS

- Overall, the national **Minimum Expenditure Basket (MEB)¹** decreased by 9% compared to the [previous quarter](#), primarily due to a reduction in food prices. The **cost of the MEB decreased in all assessed counties except Mandera**, indicating improved access of essential items, potentially due to price stabilization or declines.
- Despite the observed decrease in retail prices, **42% of interviewed vendors cited high prices from suppliers as a major constraint to business sustainability**. Additionally, a high proportion (**93% of male and 91% of female**) vendors reported operational challenges. These included low consumer demand, damaged market infrastructure, and lack of capital to restock.
- While **88%** of interviewed vendors noted that markets remain physically accessible, **59%** observed that customers could not afford basic goods.
- Of the 48 markets assessed, 58% were classified as having limited functionality and 42% as having poor functionality, highlighting significant challenges in market operations and 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/>

MINIMUM EXPENDITURE BASKET (MEB)

The MEB¹ 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 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

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

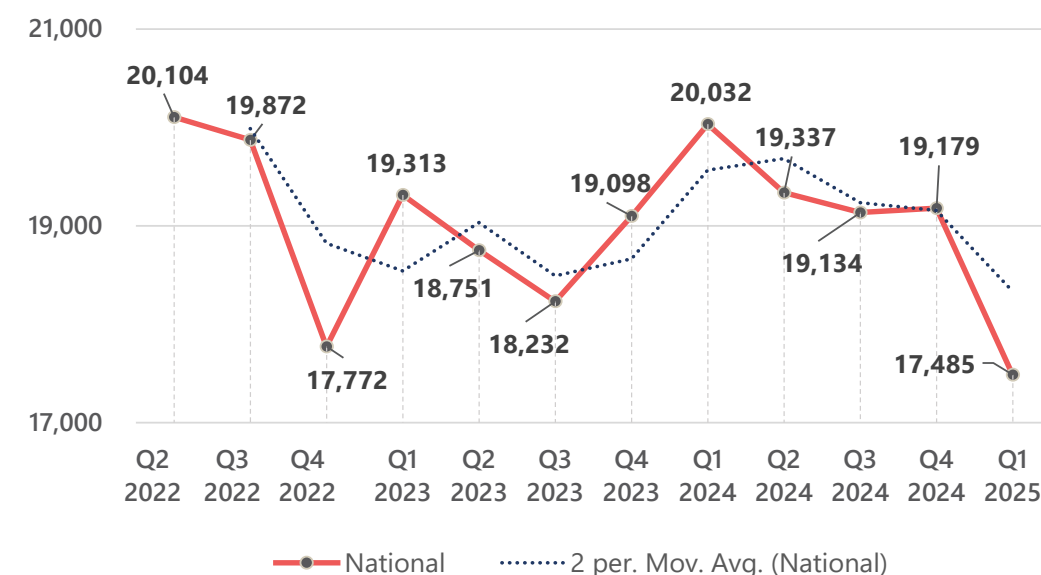
Non-Food Items

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 KES² AND CHANGE SINCE Q4 2024

County	MEB ¹	Change ³	Food MEB	Change ³	NFI MEB	Change ³
Mandera	22,708	▲ 14%	15,296	▲ 2%	7,412	▲ 52%
Wajir	21,513	▼ 1%	14,115	▼ 13%	7,398	▲ 34%
Turkana	19,613	▼ 7%	13,287	▼ 20%	6,326	▲ 37%
Marsabit	17,818	▼ 10%	12,218	▼ 12%	5,600	▼ 7%
Tana River	17,151	▼ 5%	11,785	▼ 11%	5,366	▲ 11%
West Pokot	15,844	▼ 15%	11,844	▼ 16%	4,000	▼ 13%
Baringo	15,407	▼ 15%	11,146	▼ 21%	4,261	▲ 6%
Kilifi	15,144	▼ 18%	10,992	▼ 18%	4,151	▼ 19%

NATIONAL MEB (KES²) TRENDS OVER TIME



The national MEB has shown significant fluctuations between Q2 2022 and Q1 2025, without a consistent upward or downward trend. **The highest MEB was recorded in Q2 2022 at KES 20,104, while the lowest was recorded more recently in Q1 2025 at KES 17,485.** This marks a notable decline following a period of relative stability and a downward trend in 2024, which corresponds with reduced inflationary pressures during the year and favourable climatic conditions.^{6,8}

Q1 2025 MEB TAKEAWAYS

- A decrease in the MEB was observed in 7 out of the 8 assessed counties, consistent across both the overall and food MEBs.
- Mandera County was the only county where the total MEB increased, primarily driven by the rise (52%) in the cost of NFI components, notably the unit price of 20L water increased by KES 27, and the price of a solar lamp rose to more than four times its previous quarter cost.
- According to the March 2025 Agricultural Sector Survey by the Central Bank of Kenya (CBK), food prices showed mixed trends, with improved output of key staples linked to the favorable outlook for the long rains season, and ongoing subsidized fertilizer interventions.⁶ These factors likely contributed to greater food availability in local markets and lower food prices during the post-harvest period following the short rains.⁷
- The observed decline in the MEB suggests a temporary improvement in affordability, potentially reducing financial pressure on vulnerable populations and improving access to necessities.

FOOD AND NFI PRICE COMPARISON

- Between December 2024 and March 2025, the highest monthly food price decrease was observed for vegetables including kales (-31%), spinach (-29%) and common traditional vegetables (-16%) and among grains including white maize (-13%), cowpeas (-9%), rice (-4%) and beans (-3%). The surges reported in the prices include cattle milk (+22%) and pigeon peas (+13%).
- Among the monitored NFI items, energy components including kerosene (+33%) and solar lamp (+24%) had the highest price increase. Only the A5 exercise book increased (+23%) among the monitored school supplies and the price of 2kg charcoal also increased by 21%.

COST OF THE MEB IN KES² AND CHANGE SINCE PREVIOUS ROUND

Items	Overall median cost	Change ³	Baringo	Kilifi	Mandera	Marsabit	Tana River	Turkana	Wajir	West Pokot
White maize (1 Kg)	66	▼ 13%	50	67.5	150	60	65	145	70	40
Maize flour (1 Kg)	90	▲ 6%	80	70	120	100	80	100	100	50
Wheat flour (1 Kg)	100	0%	100	85	125	100	100	100	100	100
Rice (1 Kg)	125	▼ 4%	120	120	162.5	120	120	140	130	130
Beans (1 Kg)	145	▼ 3%	130	135	200	120	160	200	150	140
Cowpeas (1 Kg)	145	▼ 9%	140	120	150	175	140	75	180	250
Pigeon peas (1 Kg)	198	▲ 20%	*	170	*	*	160	250	*	225
Tea leaves (50 g)	25	0%	20	30	40	25	20	50	25	20
Cattle milk (1 L)	150	▲ 22%	120	140	200	120	140	200	200	160
Vegetable oil (1 L)	295	▼ 2%	290	260	230	300	290	300	300	300
Salt (200 g)	14	▲ 22%	15	10	20	10	10	20	15	12.5
Sugar (1 Kg)	155	▲ 2%	150	160	150	140	160	200	145	180
Onions (1 Kg)	100	▼ 10%	100	120	100	90	100	135	110	80
Tomatoes (1 Kg)	100	▲ 5%	100	80	130	100	100	145	120	100
Kale (1 Kg)	60	▼ 31%	50	55	80	75	60	60	100	50
Spinach (1 Kg)	60	▼ 29%	50	70	90	60	60	50	100	60
Traditional vegetables (1 Kg)	80	▼ 16%	60	80	100	*	80	50	*	*
Cabbage (500 g)	100	▼ 2%	40	100	125	120	100	100	100	100
Soap (120 g)	46	▲ 16%	42.5	30	50	50	50	30	50	30
Sanitary pads (8 pack)	100	0%	80	80	100	100	80	125	100	100
Toothpaste (35 ml)	55	▼ 8%	75	60	50	50	50	75	100	50
Jerry can (20 L)	150	▼ 18%	150	100	*	135	120	250	195	150
Bucket (20 L)	223	▼ 15%	225	215	200	220	200	350	280	250
Solar lamp (1 pc)	700	▲ 24%	550	575	1,300	700	1,650	700	900**	550
Firewood (1 bundle)	100	0%	*	100	50	100	100	100	100	150
Charcoal (2 Kg)	85	▲ 21%	60	70	200	100	50	250	200	50
Kerosene (1 L)	240	▲ 33%	*	*	*	240	152	250	*	*
Pen (1 pc)	10	0%	10	10	25	10	10	10	20	10
Pencil (1 pc)	10	0%	10	5	10	5	5	10	10	10
Rubber (1 pc)	10	0%	10	5	10	10	10	20	10	10
Exercise book (1 pc)	20	▲ 23%	25	17.5	45	15	15	30	20	20
Sharpener (1 pc)	7.5	▼ 25%	5	5	10	5	5	15	10	15
Water refill from a tap stand or borehole (20 L)	15	▼ 25%	5	10	32.5	25	10	20	30	10

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

** The solar lamp price for Wajir is reported as 900 KES based on Q4 2024 data, due to lack of market availability in Q1 2025

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

Items ⁹	Number of KIs interviewed per item	Wide availability (% KIs)	Limited availability (% KIs)	Complete unavailability (% KIs)
White maize (1 Kg)	124	63%	34%	2%
Maize flour (1 Kg)	233	77%	22%	0%
Wheat flour (1 Kg)	208	72%	24%	4%
Rice (1 Kg)	234	75%	24%	1%
Beans (1 Kg)	234	71%	28%	0%
Cowpeas (1 Kg)	37	19%	41%	30%
Pigeon peas (1 Kg)	12	15%	34%	39%
Tea leaves (50 g)	125	84%	16%	1%
Cattle milk (1 L)	84	59%	33%	6%
Vegetable oil (1 L)	183	73%	27%	0%
Salt (200 g)	197	79%	20%	0%
Sugar (1 Kg)	217	77%	22%	0%
Onions (1 Kg)	108	73%	27%	0%
Tomatoes (1 Kg)	108	69%	31%	0%
Kale (1 Kg)	61	62%	28%	8%
Spinach (1 Kg)	40	47%	36%	15%
Traditional vegetables (1 Kg)	28	31%	36%	26%
Cabbage (500 g)	97	66%	34%	0%
Soap (120 g)	138	90%	10%	0%
Sanitary pads (8 pack)	108	74%	21%	5%
Toothpaste (35 ml)	95	65%	22%	11%
Jerry can (20 L)	51	61%	38%	0%
Bucket (20 L)	42	48%	45%	2%
Solar lamp (1 pc)	30	25%	53%	15%
Refill Liquefied Petroleum Gas (LPG 6 Kg)	27	29%	58%	9%
Firewood (1 bundle)	23	42%	42%	9%
Charcoal (2 Kg)	48	56%	39%	0%
Kerosene (1 L)	12	19%	39%	25%
Pen (1 pc)	119	90%	9%	1%
Pencil (1 pc)	114	90%	9%	1%
Rubber (1 pc)	88	80%	17%	2%
Exercise book (1 pc)	116	84%	15%	1%
Sharpener (1 pc)	92	80%	15%	3%
Water refill from a tap stand or borehole (20 L)	31	51%	46%	3%

Items	Remaining stock (days)	Time needed to restock (days)
White maize (1 Kg)	14	1
Maize flour (1 Kg)	11	1
Wheat flour (1 Kg)	10	1
Rice (1 Kg)	10	1
Beans (1 Kg)	14	1
Cowpeas (1 Kg)	14	1
Pigeon peas (1 Kg)	20	2
Tea leaves (50 g)	12	1
Cattle milk (1 L)	7	1
Vegetable oil (1 L)	12	1
Salt (200 g)	15	1
Sugar (1 Kg)	10	1
Onions (1 Kg)	7	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)	14	1
Sanitary pads (8 pack)	30	1
Toothpaste (35 ml)	21	1
Jerry can (20 L)	20	1
Bucket (20 L)	21	1
Solar lamp (1 pc)	30	1
Refill (LPG 6 Kg)	***	***
Firewood (1 bundle)	5	2
Charcoal (2 Kg)	7	2
Kerosene (1 L)	9	2
Pen (1 pc)	21	1
Pencil (1 pc)	21	1
Rubber (1 pc)	21	1
Exercise book (1 pc)	21	1
Sharpener (1 pc)	28	1
Water refill from a tap stand or borehole (20 L)	***	***

A third (33%) of vendors self-reported limited or no availability of some commodities. Additionally, among the vendors (70%) who reported experiencing difficulties in restocking, 24%¹⁰ cited unavailability of core commodities.

Cowpeas (41%), vegetables including traditional vegetables and spinach both at 36% and pigeon peas (34%) were among the food items for which a higher proportion of vendors self-reported limited availability. As a result, the absence of vendors selling pigeon peas and traditional vegetables led to gaps in price data in Baringo, Mandera, Marsabit, Wajir and West Pokot 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 LPG cooking gas (58%), solar lamps (53%) followed by kerosene (36%) were found to have the highest proportion of interviewed vendors reporting limited availability within the market at the time of data collection. Additionally, energy items recorded slightly delayed restocking compared to the other 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.

Despite the reported challenges, the restocking time for both food and NFIs was mostly one day. The short time needed to restock suggests a low likelihood of commodity shortages. The consumable items such as food items, soap and charcoal would need to be replenished more frequently than non-consumable items such as solar lamps and buckets to meet household needs.

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

MAIN SUPPLY ROUTES

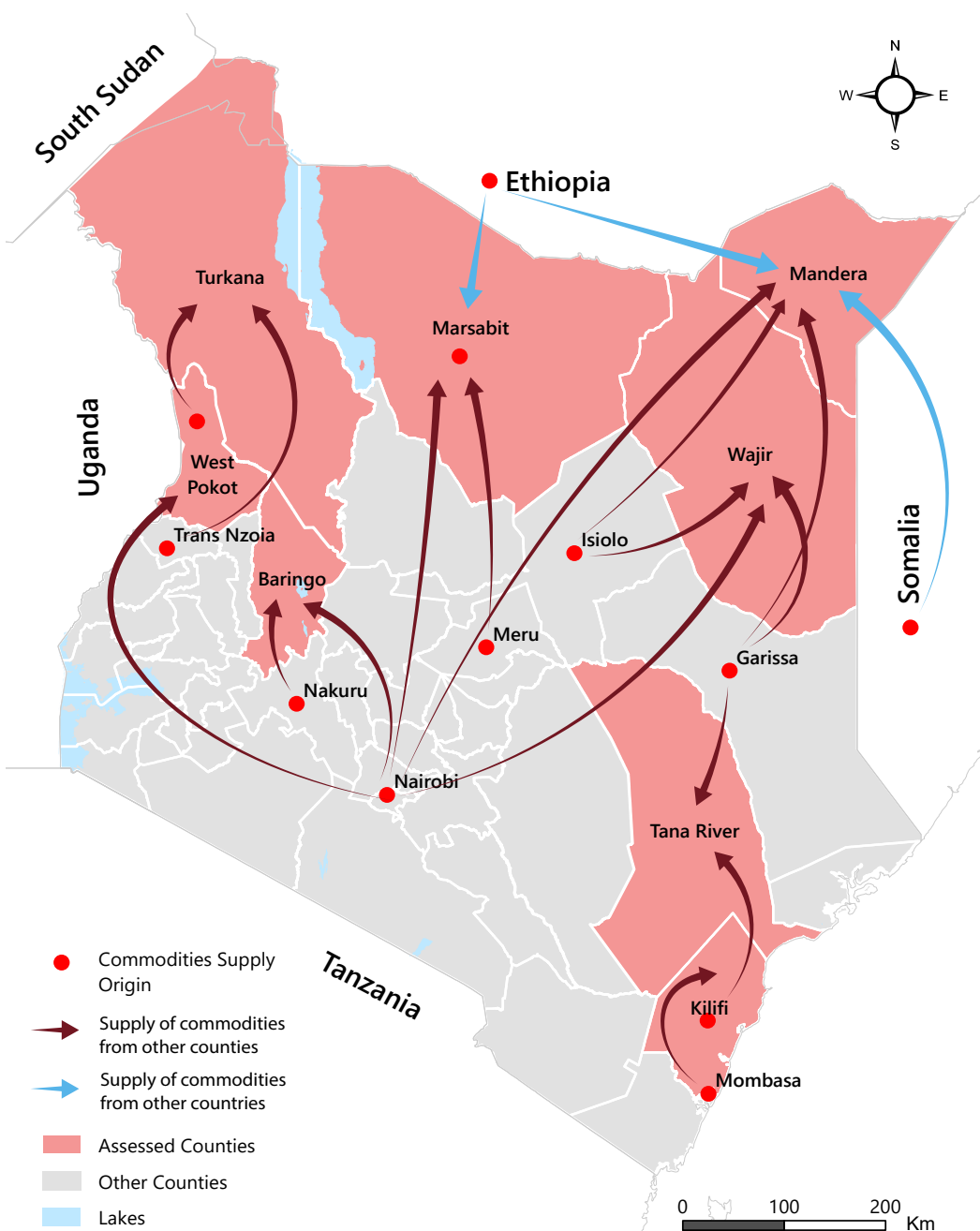


Figure 2: Map of main supply route of assessed counties

* This is a self-reported question 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 supply routes of commodities from main suppliers as reported by interviewed vendors. These insights into supply routes are important for assessing market resilience.

Almost all (98%) interviewed vendors indicated that their main supplier was located within Kenya, primarily within their respective counties, followed by neighboring counties. The dominance of domestic supply routes indicates a degree of market self-reliance, which can enhance resilience during regional disruptions. Notably, many vendors sourced commodities from Nairobi County, the capital as well as sourcing from Meru and Trans Nzoia counties which are major agricultural producing regions in Kenya.¹¹

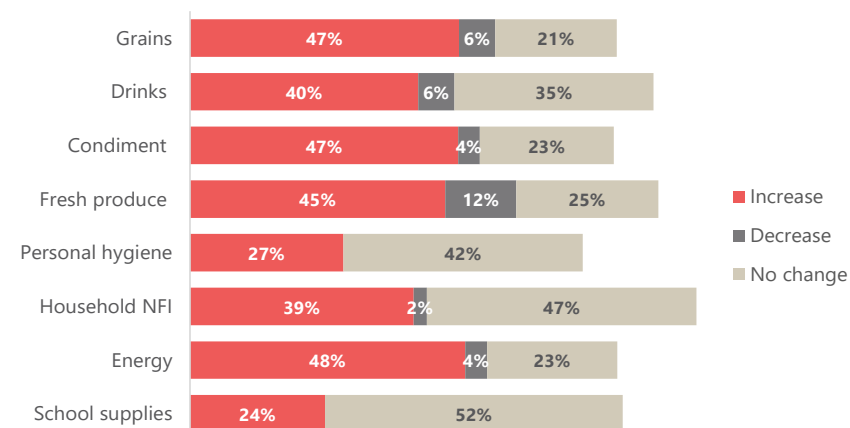
Findings also indicate limited reliance on cross-border trade, with only a few vendors (n=9)¹² reportedly sourcing commodities from neighboring countries including Ethiopia and Somalia. These vendors were primarily located in border counties of Marsabit and Mandera.

REPORTED PREDICTED CHANGES IN SUPPLIERS' PRICES

According to the Kenya National Bureau of Statistics (KNBS), the annual inflation rate stood at 3.6% in March 2025, indicating upward pressure on prices in the economy compared to 3% in December 2024.⁸ Half (50%) of the interviewed vendors reported that they were able to predict price changes in popular commodities one month ahead of data collection.

A considerable proportion of vendors reported expected price increases across most commodity categories, particularly energy items (48%), grains and condiments (both at 47%), followed by fresh produce (45%). The expectation of rising energy prices is notable, as it may lead to increased operational costs for businesses, which could be passed on to consumers in the form of higher prices for other goods and services. Also, interviewed vendors cited increased customer demand, decreased supply due to limited availability and worsening road conditions as reasons for the anticipated price increases.

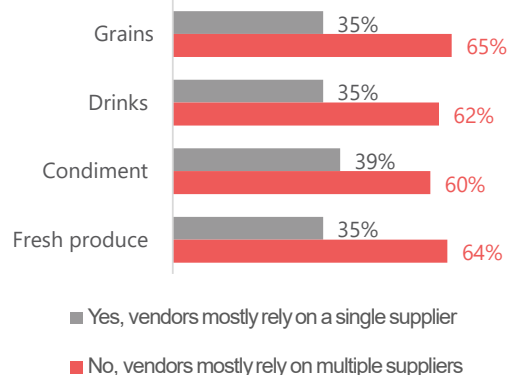
Expectation of supplier price changes one month following data collection, by % of vendors who reported being able to predict supplier price changes by category:^{9*}



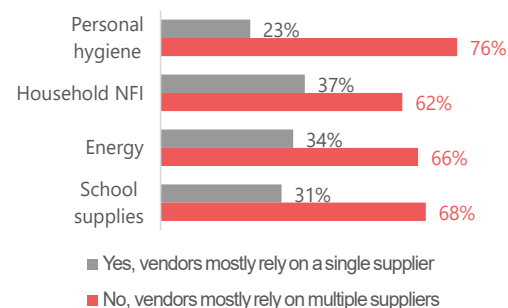
SUPPLIER



% 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



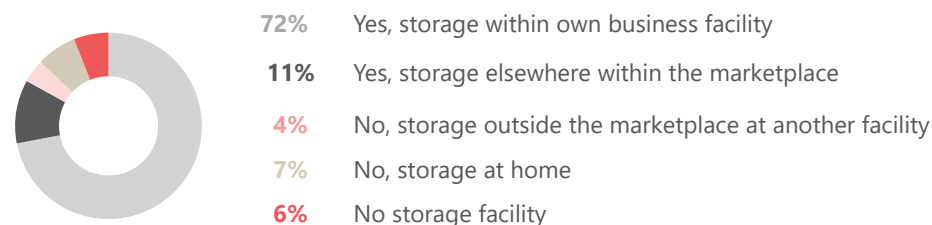
At the time of data collection, more than half of interviewed vendors reported relying on multiple suppliers. Vendors who rely on a sole supplier are vulnerable to supply disruptions, which may arise from having limited alternative options. Sourcing from multiple suppliers can help in obtaining competitive pricing and ensuring continuous availability of a wide range of products.

ACCESS TO A LOCKED, SECURED STORAGE FACILITY

In the 3 months prior to data collection, most vendors (72%) reported having access to a locked or secure storage facility within the marketplace. Such access provides several benefits, reducing the risk of theft, vandalism, and damage from environmental factors. This helps maintain product quality and shelf life, positively affecting the profitability and sustainability of their businesses.

Conversely, a few (7%) vendors had storage facilities located outside the marketplace or at their homes. Only 6% 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:



CHALLENGES FACED BY VENDORS

Most reported challenges faced in the 3 months prior to data collection, by % of all interviewed vendors by gender:¹⁰



Overall, a slightly higher proportion of male vendors (93%) than female vendors (91%) reportedly faced vendor-related challenges. However, for several of the most common barriers, a higher proportion of female vendors reported being affected. These challenges hinder vendors' ability to purchase additional stock and affect business profitability.

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 (21%) who reported a decrease:⁷



Additionally, issues related to insecurity and instability in the area were mostly reported in Mandera (18%)¹⁰ followed by Marsabit (4%)¹⁰ County. Challenges related to the effects of floods were most reportedly experienced in Tana River County as reported by 6%¹⁰ of vendors.

Despite the reported challenges experienced, nearly half (44%) 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:¹⁰

42% Difficulty with price charged by supplier

24% Difficulty with availability of core goods

18% Lack of funds to restock

15% Unpaid market purchases made on credit

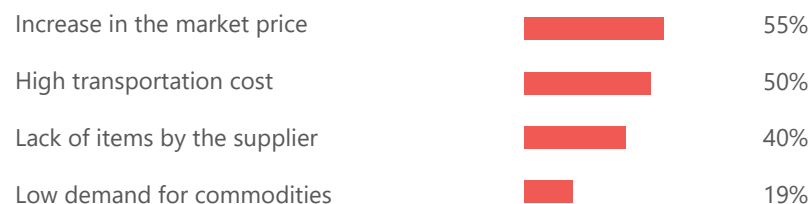
More than two-thirds (71% male and 69% female) of the interviewed vendors reported having faced difficulties keeping their businesses operational and well-stocked. The most commonly reported challenges listed above directly affect vendors' ability to purchase additional stock and compromise the profitability of the business.

Interviewed vendors reported notable challenges in restocking key commodities, with the highest difficulty observed in the energy sector. Approximately 34% of vendors cited difficulties in restocking energy items such as kerosene, charcoal, firewood, LPG, and solar lamps. Similarly, 30% of vendors experienced restocking difficulties for fresh produce, including vegetables like kale, spinach, onions, and tomatoes.

Lower levels of restocking difficulty were reported for drinks (16%), household non-food items (17%), and personal hygiene products (12%), indicating relatively more stable supply chains for these categories.

SHORTAGE OF COMMODITIES

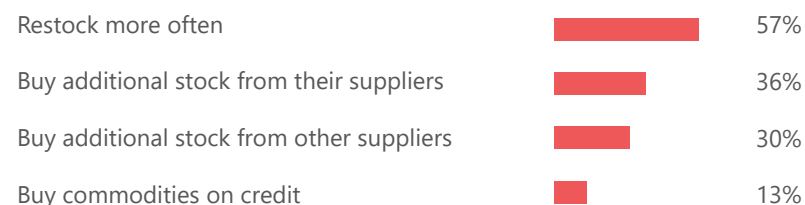
Most reported causes of shortages for commodities at the time of data collection, by % of vendors (33%) who reported experiencing shortages of some commodities:¹⁰



Increase in the market prices (55%)¹⁰ and the high transportation costs (50%)¹⁰, were identified as contributing factors to shortages by vendors (33%) experiencing limited or complete unavailability of some commodities. Lack of items by the supplier was cited as a key factor contributing to commodity shortages by 40%¹⁰ of vendors, limiting their ability to restock and meet customer demand.

COPING MECHANISMS EMPLOYED

Most reported strategies used by interviewed vendors to address unavailability of commodities at the time of data collection, among 33% of vendors who reported experiencing shortages of some commodities:¹⁰



The primary coping mechanism for vendors facing shortages is to restock more frequently, often by purchasing additional stock from alternative suppliers or acquiring goods on credit from the market. However, vendors in Baringo (9%) and Tana River (3%) reported having no coping mechanisms in place. This lack of adaptive strategies leaves them particularly vulnerable to revenue loss and business disruptions during periods of shortage.

CHALLENGES FACED WHEN TRANSPORTING COMMODITIES

Most reported transportation challenges in the 3 months prior to data collection, by % of all interviewed vendors:¹⁰

- 61%** High cost of transport
- 24%** Unusable roads
- 19%** Distance is too far to cover on foot
- 13%** Damage of goods on transit

The high cost of transportation was the most cited transportation challenge, except in Mandera County where unusable roads (57%)¹⁰ was the most reported challenge. During the period of review, fuel prices, including petrol and diesel slightly increased.¹³ The most common means of transport were the use of motor vehicles (84%). The high cost of transportation may affect operational costs and leads businesses to pass this burden onto consumers by increasing commodity prices.

More than half (51%) of vendors reported receiving deliveries from suppliers, while 48% sourced their commodities directly.

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

- 1** 84% Motor vehicles (Passenger cars, Tuk Tuk, Bus, Motorcycle, Boat, Van, Pickup, Truck, Lorry)
- 2** 9% Supplier delivers
- 3** 2% On foot

BARRIERS TO MARKET ACCESS

Physical barriers

Marketplaces appeared to be accessible as 88% of interviewed vendors reported that they did not face any issues with physically accessing the marketplace. The **presence of any physical access barriers was greatest in Baringo (19%), Tana River and Mandera counties, both at 18%.**

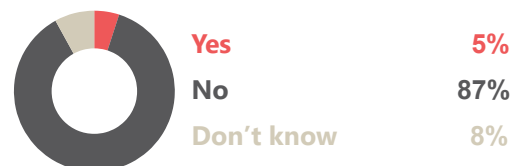
Most reported physical barriers to accessing the marketplace in the 3 months prior to data collection, by % of all interviewed vendors:¹⁰

- 4% Limited transportation options
- 2% Inadequate facilities
- 2% Active or ongoing fighting in the area
- 2% Hazard and damage on roads

Social barriers

Mandera County had the highest proportion of vendors (32%) reporting social barriers that led people to avoid the marketplace. In contrast, all vendors interviewed in Baringo and Wajir reported not experiencing any discrimination or exclusion. The difference in findings across counties highlight the contextual factors that potentially impact access to markets. A 1% improvement was observed in those not reporting social barriers compared to the [previous quarter](#).

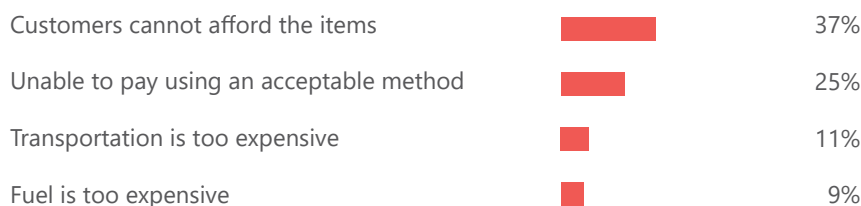
% of vendors reporting groups of people who sometimes avoided going to the marketplace in the 3 months prior to data collection due to discrimination, exclusion, or feeling unwelcome:



Financial barriers

Over half the vendors (59%) cited financial challenges impacting on customers. This was particularly reported in Marsabit (92%) and West Pokot (89%), indicating that consumer purchasing power remains highly constrained. The primary financial challenge reported by most vendors was customers' inability to afford the available items, followed by difficulties with payment methods, which likely resulted in fewer customers. Furthermore, 18%¹⁰ of vendors cited public transportation costs as a limiting factor, while 10%¹⁰ pointed to fuel expenses as a barrier to marketplace access. Therefore, customers encountered financial difficulties related to both reaching the business and paying for 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:¹⁰



SECURITY ISSUES

Most reported security factors that negatively impacted businesses in the 3 months prior to data collection, by % of all interviewed vendors:¹⁰



The security situation in the ASALs remains localized but persistent, affecting market access, humanitarian operations, and community resilience. These counties are among those affected by conflict, with intercommunal and border tensions fueled by competition over natural resources. Among the assessed counties, Mandera (21%) had the highest proportion of vendors reporting that security factors negatively impacted them. Slightly more male vendors (14%) than female vendors (12%) reportedly faced security related issues.

ACCEPTABLE MODE OF PAYMENT

Most reported accepted payment methods by vendors in the 3 months prior to data collection:¹⁰

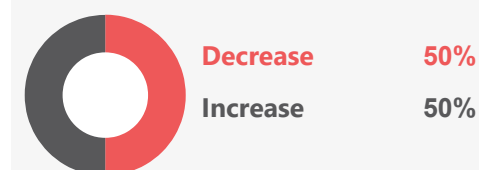
- 1 95% Cash (local currency)
- 2 85% Mobile money
- 3 9% Informal credit
- 4 8% Money transfers
- 5 4% Credit or Debit cards

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 (64%) who reported a change:



MARKET FUNCTIONALITY SCORE (MFS)

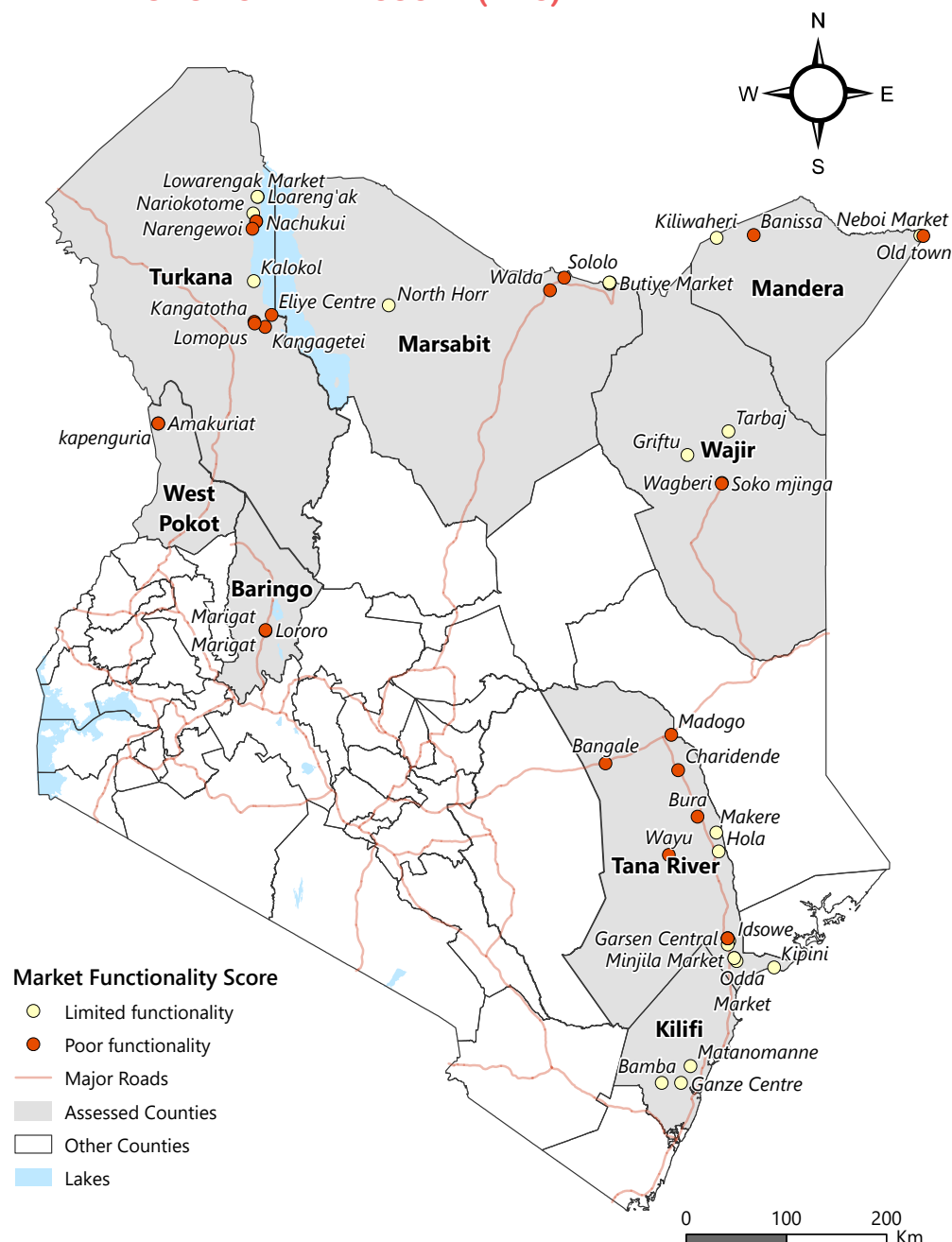


Figure 3: Map of market functionality of Q1 2025 assessed markets

MARKET FUNCTIONALITY

Market functionality, an extension of the JMMI, brings together indicators from all segments of the JMMI assessment and is based on the following five key dimensions and standard dimension weights:

- **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 of these dimensions contributes to a market's ability to both supply customers with core food and non-food items and enable market vendors to conduct business. The market classification is determined by aggregating each indicator across all assessed vendors in the market by assigning a market functionality score (MFS).¹⁴ This can help humanitarian actors understand which markets function well enough to be good targets for cash and voucher assistance (CVA) and which require alternative forms of market-based programming (MBP) to help them become self-sufficient.

Resilience was the least-performing dimension, followed by the affordability dimension. All the markets assessed reported lower scores within the resilience pillar (<10/20), indicating challenges with maintenance of supply chains and stock availability. The affordability dimension is based on price comparisons of monitored items against the national medians, customers' financial access, and price predictability of commodities.

The dimension with the highest overall performance was infrastructure, with no market of the 48 assessed markets achieving less than 50% of the maximum score within this dimension. This dimension considers the quality of facilities, storage options and payment modalities. 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 48 markets assessed, more than half (58%) were classified as limited functionality, while the remaining 42% were classified as poor functionality. However, the MFS computation is limited, as it relies on five dimensions to classify the markets and may not incorporate all relevant attributes. Therefore, market functionality results should be interpreted relatively and supplemented with local knowledge of market dynamics in each county. Markets in remote areas within the ASALs, which may adequately serve local communities, often have few vendors. Consequently, fewer surveys are conducted, potentially adversely affecting scores on availability and affordability, leading to a less favorable market classification.

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, 482 vendors were interviewed as key informants. The interviews were conducted both face-to-face and remotely with vendors selling food and non-food items. Data was collected between 22nd of March and 14th of April 2025 across 48 markets in the assessed counties.

REACH Initiative 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 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 4% of data collected remotely.
- Due to an issue with the data collection tool, price data for LPG gas was not captured during the assessment.
- 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-129.49 KES in March, 2025.

³ Change since the last round of JMMI data collection in December 2024 (Q4 2024).

⁴ National Drought Early Warning Bulletin by NDMA, March 2025.

⁵ East Africa Seasonal Monitor, Famine Early Warning Systems Network (FEWS NET), May 2025.

⁶ Agricultural Sector Survey by CBK, March 2025.

⁷ ACAPS Seasonal Calendar.

⁸ Consumer Price Indices and Inflation Rates, March 2025.

⁹ 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."

¹⁰ For multiple answer questions, respondents could select multiple options hence the findings may exceed 100%.

¹¹ 2024 Gross County Product by KNBS, December 2024.

¹² Sample size (n) refers to the total number of respondents (in this case vendors) in the sample under study.

¹³ EPRA Retail Petroleum prices in Kenya by Kenyan News, March 2025.

¹⁴ 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 Initiative.

Participating agencies

