Ethiopia | Joint Market Monitoring Initiative (JMMI)

09 -23 July 2025

MARKET OVERVIEW

INTRODUCTION

The Ethiopia Joint Market Monitoring Initiative (JMMI) provides regular, reliable data on market prices and functionality using standardized methods, led by REACH in collaboration with the Ethiopia Cash Working Group (ECWG).

Since September 2021, this initiative has supported Cash and Voucher Assistance(CVA) implementing organizations by providing continuous market price information to inform project design and planning. Its primary goal is to support CVA programs by monitoring market dynamics and enabling informed decision-making. This ensures that interventions are based on accurate and timely market data, ultimately enhancing the effectiveness of aid delivery.

Coverage

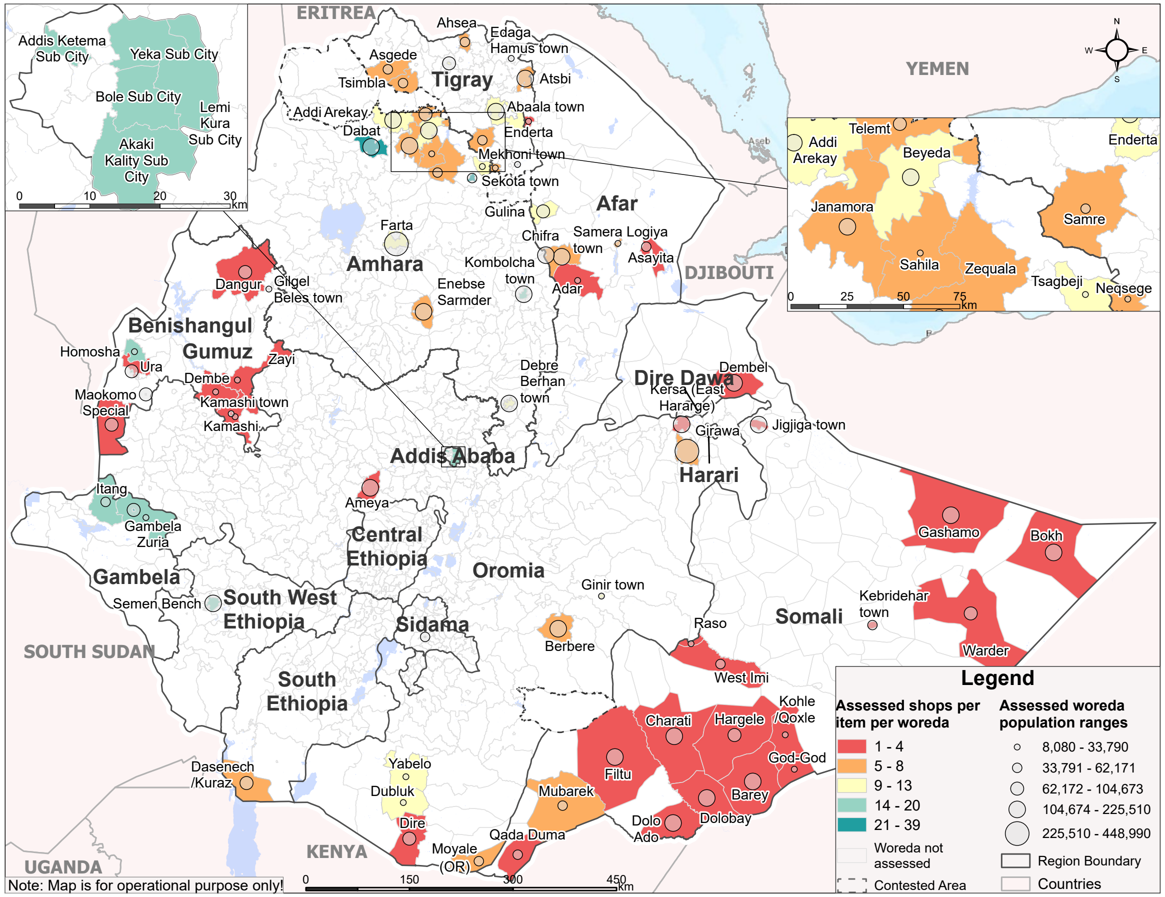
25	Participating agencies
11	Assessed regions
79	Assessed woredas
169	Assessed Marketplaces
602	Key informant interviews (KIIs)
53	Commodities assessed

In July 2025, coverage was low due to a reduced number of partners and the suspension of USAID projects, leading to decreased data collection. No surveys were conducted in Harari, Dire Dawa, and the Central Ethiopian regions. Additionally, CWG partners in other areas reduced their support, further impacting data collection.

KEY INDICATORS

Median Cost of JMMI Full Basket	Median Cost of JMMI Food Basket	Median Cost of NFI Basket
18,703 ETB	17.204 ETB	1,499ETB
137.60 USD[1]	126.60 USD[1]	11USD[1]
▲ ETB 4,160 ▲29 %	▲ ETB 3,564 ▲26 %	▲ ETB 599 ▲66 %

Map 1: Assessed Marketplaces, By Woreda



Key Messages

- In July 2025, the JMMI was officially expanded to better reflect the current consumption needs of households.
- The expansion added essential items in health, communication, and transport, vital for daily life, and updated the basket to include basics like charcoal, electricity, firewood, and water, essential for household needs and livelihoods.
- Furthermore, the revision took into account regional consumption patterns to ensure that the basket accurately represented the diverse needs across different areas.
- This regional tailoring improved accuracy by capturing local consumption patterns, **aligning with ECWG guidelines for consistency, and enhancing the JMMI's ability to assess household needs and guide relief efforts.**
- This update caused the cost of the Minimum Expenditure Basket (MEB) to rise. Full baskets and food baskets increased by 29% and 26%, respectively, from June to July. Non-food items (NFI) rose even more, by 66%, overall increasing the JMMI cost.
- Market performance improved slightly in July, but many markets still face supply and availability challenges.
- ***These observed price fluctuations and persistent market challenges highlight the critical need for CVA (Cash and Voucher Assistance) implementers to closely monitor market conditions.***

1. Exchange rates are taken from the United Nations (UN) Operational Rates of Exchange.

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Market Functionality Score (MFS)

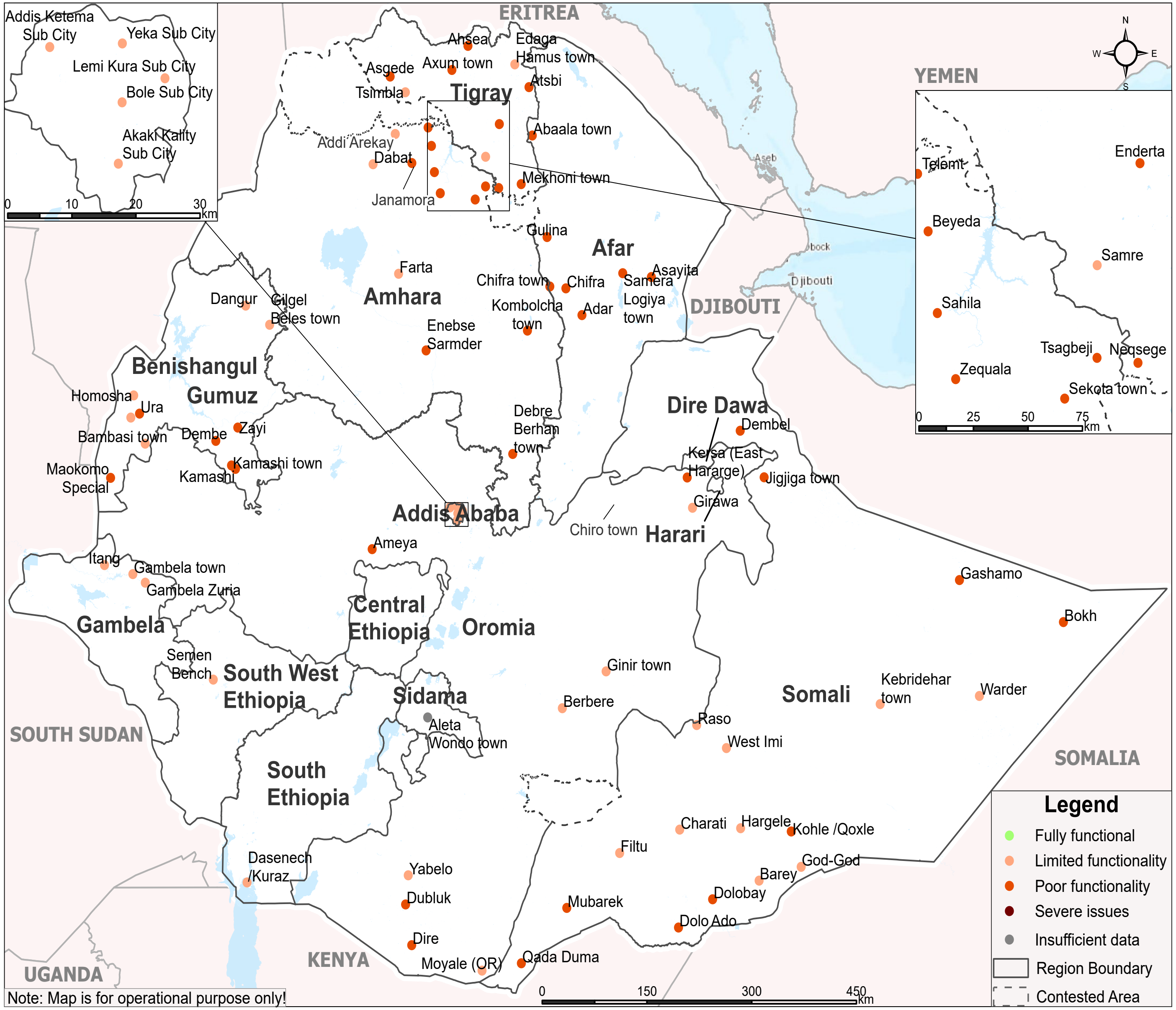
The Market Functionality Score (MFS) is a method of classifying markets based on their level of functionality, helping aid actors understand which markets function well enough to support cash and voucher assistance (CVA) and which may require alternative interventions. The MFS is divided into five dimensions:

- **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 July 2025 round, less than half (44%) of the assessed markets reported limited functionality, while the remaining 55% reported poor functionality.
- Among those with poor functionality, the Amhara region (23%), Somali region (21%), Tigray region (16%), and Afar (16%) contributed to the 55% of markets with poor functionality.
- However, in terms of security improvements, regions like Oromia showed a relative enhancement, with only 9% of markets contributing to the 55% poor functionality in July, compared to 24% in June 2025, when the overall poor functionality was 42%.

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



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JMMI Basket

The JMMI full basket is designed to represent a comprehensive package of essential food and non-food items (NFIs) that a typical six-person Ethiopian household consumes each month. Its purpose is to serve as a practical tool for understanding household expenditure needs across different regions of Ethiopia, reflecting local consumption patterns and priorities. The food component includes a variety of staple crops, vegetables, fruits, and condiments, all regionally tailored to account for diverse dietary habits and preferences throughout the country. This regional customization ensures that the basket accurately captures the types and quantities of foods that households typically purchase.

In addition to food items, the basket encompasses key non-food essentials necessary for daily life and household hygiene. These include hygiene products such as soap and sanitary items, energy sources like charcoal, firewood, and electricity, as well as water for drinking, cooking, and sanitation. Including these non-food items highlights their importance in household budgets and overall well-being, ensuring the basket reflects the full spectrum of basic household needs.

The development of the JMMI basket is informed by the Ethiopia Cash Working Group's efforts to establish a Minimum Expenditure Basket (MEB), particularly their MEB guidline released in May 2025. The MEB aims to define the minimum costs households need to meet their basic needs, serving as a key reference for social protection programs, humanitarian response, and policy planning. By aligning with these standards, the JMMI basket seeks to provide a comprehensive and standardized measure of core monthly expenditures for households across Ethiopia.

Furthermore, the basket is developed through systematic market price monitoring across various regions, ensuring it remains up-to-date and reflective of current market conditions. Regular price data collection allows for timely adjustments, making the JMMI basket a relevant and reliable tool for assessing household living costs. Its use supports informed decision-making by policymakers, development agencies, and humanitarian actors working to improve household welfare, plan interventions, and allocate resources effectively throughout Ethiopia.

Table 1: JMMI Full Basket Median Price Per Region

Region	Full basket median price in July(ETB)	Full basket median price in July (USD)	Full basket median price in June (ETB)	Full basket median price in June (USD)	Change since June
Addis Ababa	17137[a]	126	13362	100.21	▲ 28%
Afar	24647	181	22423	168.16	▲ 10%
Amhara	11966	88	10699	80.24	▲ 12%
Benishangul Gumuz	11942	88	11615	87.11	▲ 3%
Dire Dawa	-	-	-	-	N/A
Gambela	23881	175.7	12665	94.98	▲ 89%
Harari	-	-	-	-	N/A
Oromia	15752	115.9	12091	90.68	▲ 30 %
Sidama	21679	159.5	15800	118.50	▲ 37 %
Somali	17126	126.0	20301	152.25	▲ 16 %
South Ethiopia	23299	171.4	15522	116.41	▲ 50 %
SWE	20402	150.1	15615	117.11	▲ 31 %
Tigray	16013	117.8	12281	92.11	▲ 30%

National JMMI full basket[5]	18, 703 ETB	137.60 USD[1]	▲ 4,160 ETB	▲ 29 %
National JMMI food	17, 204 ETB	126.60 USD[1]	▲ 3,564 ETB	▲ 26 %

Accepted Payment Modalities

Proportion of vendors reporting accepting different types of payment in the 30 days prior to data collection:

1. 98% Cash (ETB)
2. 43% Mobile money
3. 39% Mobile transfer

USD/ETB official exchange rate[3]
135.935 ETB

Key Findings

- The JMMI full basket prices increased across all regions in 2025. However, the overall national JMMI full basket price rose by only 29% between June and July 2025.
- This increase, while relatively modest nationally, masks significant regional variations. The July 2025 MEB (Minimum Expenditure Basket) also included more items than previous months, which likely contributed to the higher percentage increase observed.
- The price changes suggest that regional disparities significantly influence overall trends, with some regions experiencing substantially higher increases. For instance, Gambela, Sidama, and South Ethiopia saw the largest regional increases, with price rises of 89%, 37%, and 50%, respectively.
- These large increases highlight localized factors impacting the cost of the MEB. Compared to July 2024, the national median price of the JMMI full basket increased by 53%.

[2] 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).

[3] Exchange rates are taken from the United Nations (UN) Operational Rates of Exchange.

[4] South West Ethiopia.

[5] National JMMI full and food basket prices in July 2024 and 2025 were 12,210.54ETB and18, 703,643 ETB respectively. The changes in Table 1 represent the difference between June and July 2025 prices.

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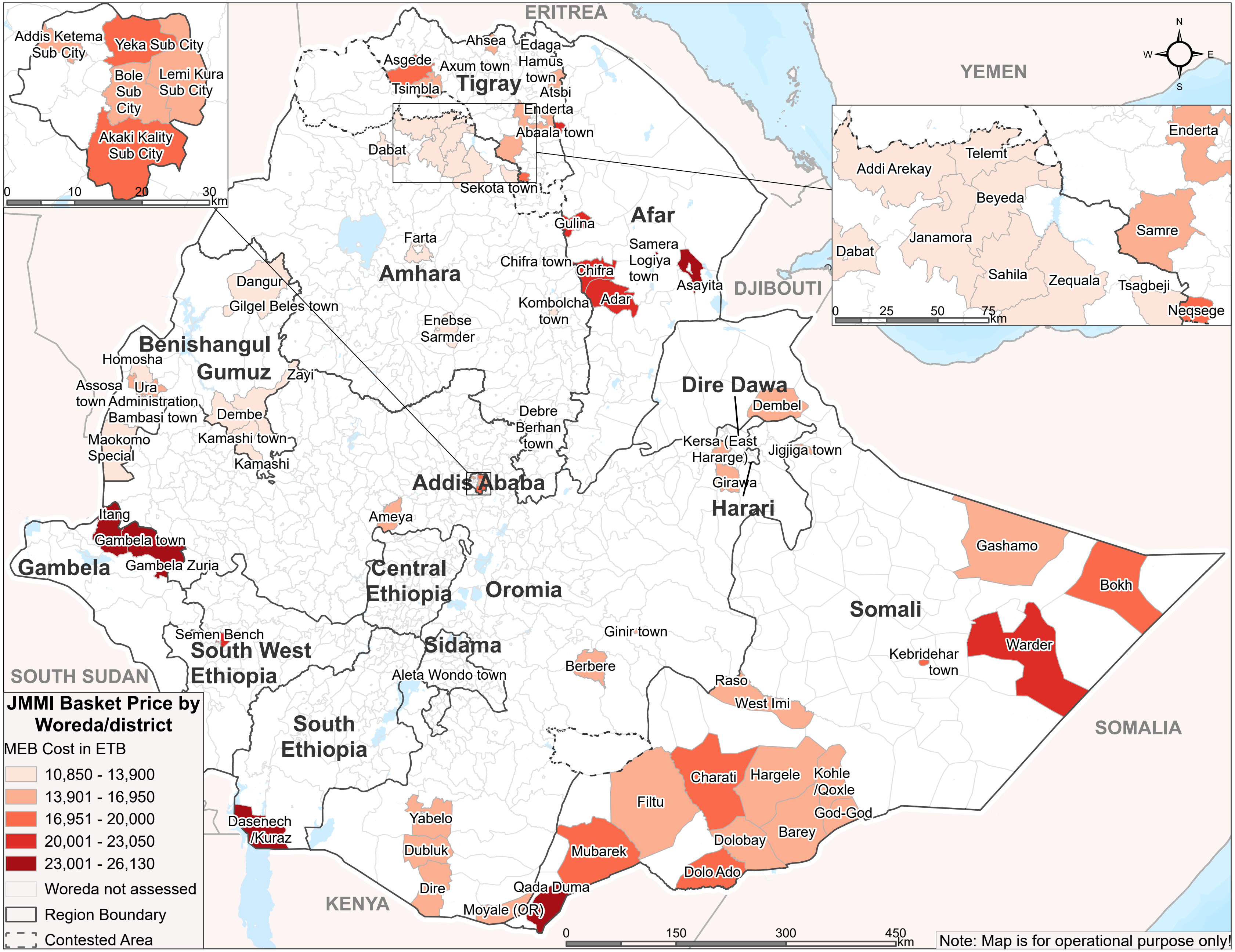
Map 3: Cost of JMMI Full Basket, By Woreda



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Key Findings

- In July, compared to June, several notable price changes occurred, likely influenced by various factors. Maize increased by 12%, possibly due to seasonal harvest fluctuations or disruptions in supply chains, and sorghum experienced a similar rise of 17%.
- Among vegetables, carrots experienced a significant increase of 43%, while potatoes rose by 17%, potentially driven by decreased yields or transportation challenges. Additionally, tomatoes increased by 14%, possibly due to seasonal shortages or heightened demand.
- Conversely, leafy greens decreased by 14%, which might be due to oversupply or favorable growing conditions during this period.
- In the beverages and condiments sector, coffee prices surged by 20%, likely influenced by global market trends, climate impacts on coffee-producing regions, or increased demand.
- These fluctuations reflect broader supply and demand dynamics, weather patterns, and global market influences affecting local prices.
- For the remaining items, data has not been calculated since they are newly included in the JMMI Basket for the first time. These items will be included in the report starting from August.

Table 3: National and Regional Median Prices Per Item[6]

Item[7]	National change since June 2025	National	Addis Ababa	Afar	Amhara	Benishangul Gumuz	Gambela	Oromia	Sidama[9]	Somali	South Ethiopia[9]	SWE[9]	Tigray
Cereals and procesed grains[8]													
Maize	▲ 12%	53	60	60	46	31	60	51	47.5	100	33.33	45	46
Sorghum	▲ 17%	70	90	**N/A**	68.75	32	70	50	N/A	109	**N/A**	50	65
Teff	▼ 4%	120	128	157.5	110	130	140	96	115	-	**N/A**	130	125
Wheat	▲ 6%	85	85	N/A	90	101.5	70	79	75	**N/A**	**N/A**	120	82.5
Barley	▲ 2%	92	-	-	75	106	100	-	100	-	**N/A**	80	87.5
Rice	▼ 2%	128	120	140	-	135	N/A	140	-	123	-	-	155
Pasta		135	200	100	-	112.5	N/A	170	-	140	-	-	125
Macaroni		130	127	97.5	-	-	-	140	-	132.5	-	-	-
Wheat Flour		110	105	112.5	-	125	N/A	110	-	110	-	-	120
Legumes & Pulses:													
Fava bean	▲ 6%	170	170	**N/A**	N/A	172.5	200	N/A	**N/A**	-	200	120	160
Garden	▼ 4%	168	170	-	140	162.5	200	200	**N/A**	-	240	70	175
Lentil	▲ 4%	280	325	**N/A**	280	260	260	400	**N/A**	-	260	120	250
Haricot		178	185	-	-	-	-	120	-	-	-	-	N/A
Chickpea		140	123	**N/A**	-	140	150	N/A	**N/A**	-	**N/A**	120	150
Sunflower		180	180	-	-	-	-	N/A	-	-	-		-
Niger		220	220	-	-	-	-	N/A	-	-	-		-
Meat & Animal Product:													
Beef	▲ 8%	1000	1000	-	950	900	1200		1000			900	1100
Lamb	NI	1200	-	-	-	-	-		-		-	-	-
Goat Meat	▲ 2%	1375	1800	1000	-	-	-		**N/A**	1400	-		-
Camel Meat	▲ 6%	1270	-	-	-	-	-	-	-	1270	-	-	-
Fish (Fresh)	NI	400	-	-		350	400	-	-	-	-	-	-
Egg	▼ 5%	20	20	-	15	21	25	19.5	**N/A**	-	**N/A**	20	20
Cow Milk	0%	120	140	238	130	150	110	115	**N/A**	100	**N/A**	100	100
Vegetables													
Leafy Green	▼ 14%	52	50	-				75			N/A	50	58.75
Tomato	▲ 14%	80	60	-	60	82.5	100	80		145	-	-	55
Carrot	▲ 43%	100	120	85	70			80	55	142	**N/A**	40	55
Onion	0%	100	80	100	90	105	130	100	80	125	120	100	90
Potato	▲ 17%	70	35	-	66.25	62.5	70	50	25	85	100	40	70
Sweet		80	62.5	-	-	106.25	N/A	80	**N/A**		**N/A**	40	90
Cassava		50	-	-	-	-	-	-	**N/A**		**N/A**	50	-
Lettuce		100	-	-	-	100	N/A	-	-		-	-	-
Kale		70	-	85	-	-	-	-	-		-	-	65
Cabbage		50	45	50	70	-	-	70	**N/A**		**N/A**	60	50
Pumpkin		50	60	-	-	-	-	N/A	-		-	-	42.5
Garlic		365	365	-	-	-	-	375	-		-	-	-
Enset	0%	150	-	-	-	-	-	-	**N/A**		**N/A**	150	-
Boye		100	-	-	-	-	-	-	**N/A**		**N/A**	100	-
Fruits													
Banana		102	-	150	100	112	100	-	**N/A**		**N/A**	40	-
Avocado		15	-	-		-	-	-	**N/A**		**N/A**	15	-
Mango		72	-	90		89.165	**N/A**	-	**N/A**		**N/A**	20	
Orange		190	-	**N/A**	190	-	-	-	-		-	-	-
Papaya		120	-	**N/A**	120	-	-	-	-		-	-	

6. The blank spaces represent item that are not part of the basket in that region.
7. The 'NA' means data for certain items prices is not available for this month.
8. These items are included in the JMMI basket.
9. In July 2025, items were only partially assessed in SWE, South Ethiopia and Sidama.

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Key Messages

- In July 2025, the price monitoring framework was expanded to include additional indicators, aligned with REACH and ECWG guidance. A new Minimum Expenditure Basket (MEB), finalized in May, was introduced alongside existing items, enabling a more comprehensive assessment of market conditions and service delivery.
- Under the new MEB, 53 items are monitored, additional categories such as energy, water, and health, with source prices derived from government rates. Incorporating these additional items helps to avoid duplication, saves time and resources, and provides a more holistic view of the market landscape among ECWG and REACH. Such an approach ensures that monitoring efforts are efficient and aligned with regional and sectoral priorities.
- However, it is important to recognize that some items listed by ECWG are not fully available in the market, which constrains the scope of price monitoring for those items. Additionally, certain critical items that are highly relevant to different regions are currently not included in the list. This gap may hinder the ability to accurately reflect regional MEBs.
- It is advisable to conduct regular reviews of item availability and household priorities to ensure that the MEB monitoring list remains relevant and inclusive. Engaging regional CWGs can provide valuable insights and help tailor the items to local contexts, thereby enhancing the relevance and usefulness of the monitoring data.
- Additionally, exploring alternative sources or proxy indicators for items that are currently unavailable can help maintain comprehensive coverage. Ongoing capacity building for monitoring teams will also be essential to handle the expanded scope efficiently.
- By implementing these recommendations, the monitoring process can become more responsive, accurate, and regionally relevant, ultimately strengthening the overall impact of the program.

Table 3: National and Regional Median Prices Per Item[6]

Item[7]	National change since June 2025	National	Addis Ababa	Afar	Amhara	Benishangul Gumuz	Gambela	Oromia	Sidama	Somali	South Ethiopia[9]	SWE	Tigray
Beverage & Condiments													
Coffee	▲ 20%	1200	1200	-	-	-	-	-	-	-	-	-	--
Sugar	▲ 4%	160	155	160	165	160	180	160	N/A	156.5	165	120	160
Salt	▲ 11%	50	30	50	42.5	60	50	60	N/A	80	52.5	40	40
Cooking Oil	0%	330	350	302.5	340	330	350	350	N/A	300	320	300	350
Butter		1200	1300		750	787.5	1000	1025	N/A	N/A	N/A	650	1400
Household & Non-Food Items:													
Bath Soap (125g)	▼ 10%	90	125	60	65	90	130	100	N/A	100	50	50	80
Laundry Soap	▼ 4%	68	80	70	75	60	60	80	N/A	60	65	60	75
Charcoal		750	1000	450	450	675	700	800	N/A	N/A	N/A	250	900
Firewood		463	-	N/A	400	350	1500	N/A	N/A	N/A	N/A	N/A	538

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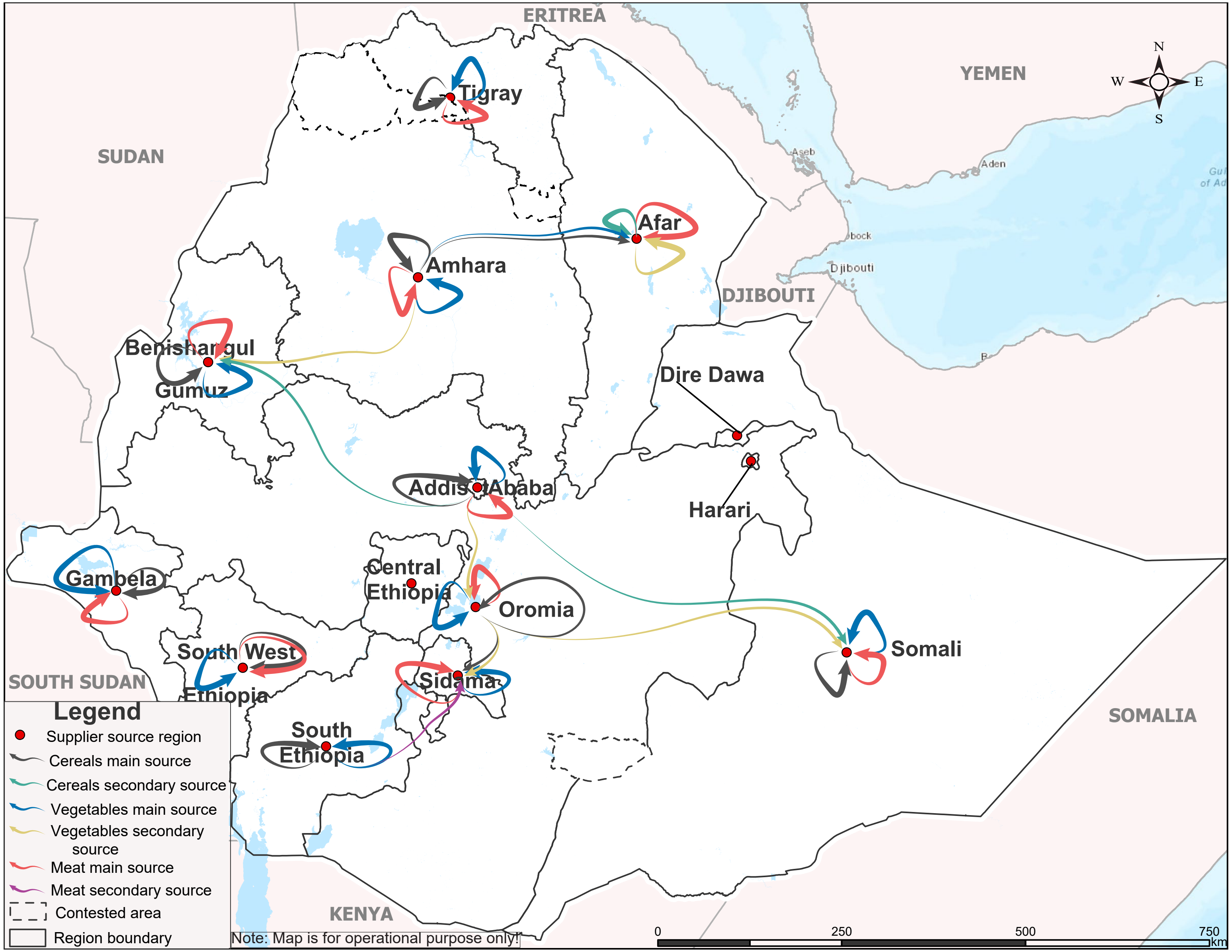
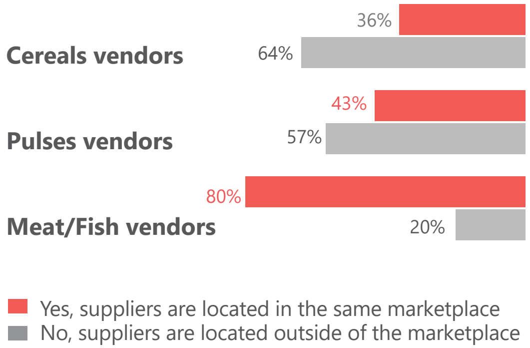
SUPPLY CHAIN AND MARKET ACCESSIBILITY

Map 4: Food Items Supply Route



LOCATION OF MAIN SUPPLIERS FOR FOOD ITEMS

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



Key Findings

- In July 2025, legumes exhibited a high, **the supply chain for legumes showed significant regional interconnection.** For example, Tigray sourced 12% of its legumes from Addis Ababa; Somali sourced 33% from Oromia and 33% from Addis Ababa; Benshangul-Gumuz sourced 40% from Addis Ababa and 30% from Amhara.
- Regarding meat, most regions relied primarily on local suppliers, with the exception of Sidama, which sourced 67% from Oromia. Ten out of eleven assessed regions did not import meat from other regions and were mainly supplied locally.
- For fresh produce, Afar sourced 63% from Amhara, and Somali sourced 40% from Oromia, indicating regional supply dependencies within the supply chain network.

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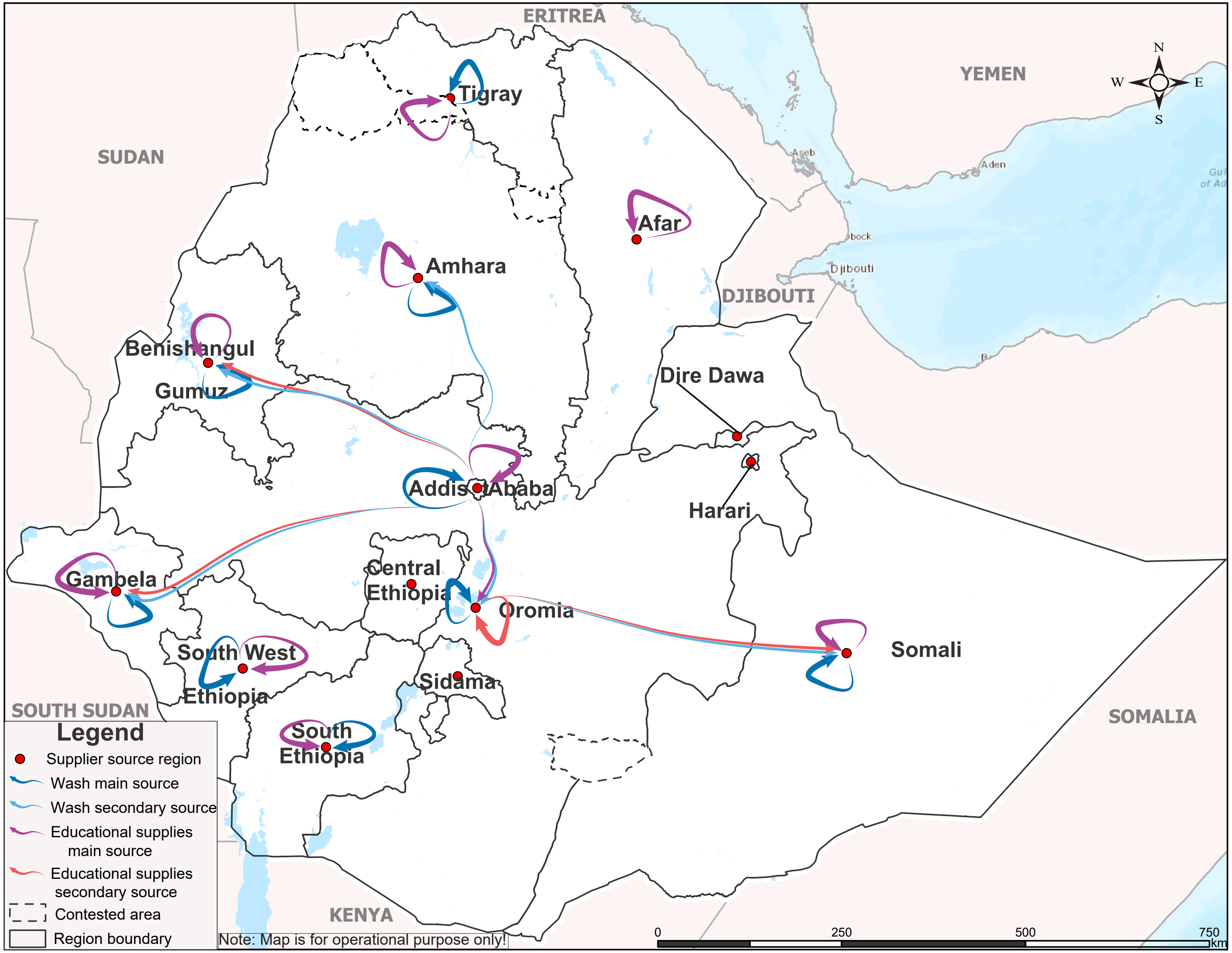
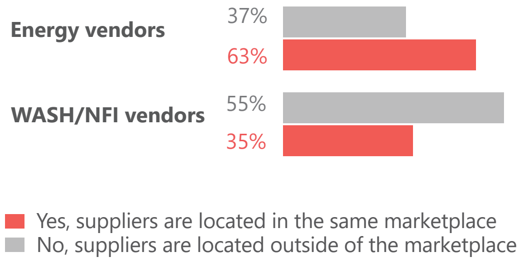
Map 5: NFI Supply Route



LOCATION OF MAIN SUPPLIERS FOR NON-FOOD ITEMS

Location of main suppliers of NFIs, by vendor type:



Key Findings

- In July 2025, the supply routes for WASH NFI (Water, Sanitation, and Hygiene Non-Food Items) in Addis Ababa primarily supplied Oromia (63%), Tigray (14%), and Afar (22%) regions. In Benshangul-Gumuz, 23% of WASH NFI supplies were sourced locally within the region, while 55% were obtained from Amhara Region, highlighting cross-regional supply linkages.
- Regarding energy supplies, all regions predominantly sourced charcoal and firewood from local regional suppliers, with the exception of Addis Ababa, where 31% of vendors obtained these fuels from Afar Region.
- These supply routes depend on specific regions, so disruptions could significantly impact essential educational and WASH supplies. Diversifying sources is crucial to improve resilience and reduce vulnerability.

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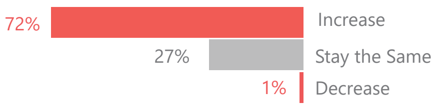
VENDOR AND CUSTOMER DYNAMICS, PREDICTED PRICE CHANGES AND MARKET ACCESS

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:

N= 144. Out of those vendors predicting an increase in food prices, the most frequently cited reasons were[10]:

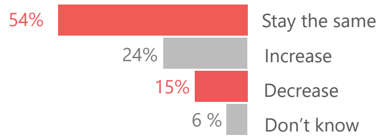
1. 60% Rising exchange rate
2. 33 % Customers demanding more of these items
3. 30% Unstable Market
4. 22% Customer running out of these items

N= 49. Out of those vendors predicting an increase in non-food item prices, the most frequently cited reasons were[10]:

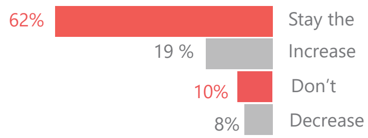
1. 57 % Rising exchange rate
2. 32 % Customers demanding more of these items
3. 30% Unstable Market

CHANGE IN NUMBER OF CUSTOMERS AND VENDORS

The percentage of vendors who said the number of customers visiting their shop has changed compared to the previous month.



The percentage of vendors who said there was a change in the number of active traders in their marketplace compared to the previous month.



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DIFFICULTIES IN MEETING DEMAND AND TRANSPORTING OR PROCURING SUPPLIES

55% (n=42) of cereals vendors reported having faced difficulties obtaining enough cereal items to meet demand in the 30 days prior to data collection.

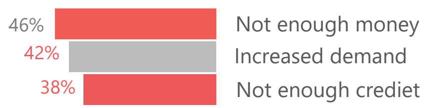
The main reasons cited by the vendors were[10]:

48% (n=21) 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[10]:

43% (n=26) 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[10]



19% (n=13) of meat and fish vendors 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 were[10]:

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)[10]:

1. 58% Men
2. 50% Women
3. 21% Children

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[10]:

1. 3% Fear of robbery
2. 3% Fear of looting
3. 2% Fear of violence

10. Percentages do not add up to 100% as vendors were allowed to give multiple answers.

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Table 3: Availability of Items in the Market, Available Stock and Time Needed to Restock in July 2025[11]

Item	Availability: Available (% KIs)	Availability: Limited Available	Availability: Not available	Stock and Restock: Days stock available	Stock and Restock: Days needed to restock
Grain & Products:s[8]					
Maize	80%	14%	2%	15	4
Sorghum	80%	14%	2%	17	3
Teff	51%	25%	15%	15	4
Wheat	52%	29%	10%	15	3
Barley	42%	39%	15%	15	3
Rice	66%	22%	4%	15	4
Pasta	67%	21%	3%	15	3
Macaroni	64%	21%	4%	15	4
Wheat Flour	60%	19%	9%	15	3
Legumes & Pulses					
Fava bean	76%	21%		16	2
Green pea	62%	31%	4%	15	2
Lentil	66%	28%	4%	15	2
Harricot bean	50%	50%		19	2
Chickpeas	53%	25%	16%	15	2
Sun flower	100%			15	1
Meat & Animal Products					
Beef	80%	14%	2%	2	1
Lamb		18%	68%	2	2
Goat Meat	51%	44%	5%	1	1
Camel Meat	85%	15%		1	1
Fish(Fresh)	62%	29%	5%	2	1
Egg	62%	29%	5%	5	2
Cow Milk	78%	20%	2%	1	1
Vegetables					
Leafy green	48%	29%	9%	1	1
Tomato	79%	21%		4	2
Carrot	48%	35%	9%	5	2
Onion	78%	20%	1%	6	2
Potato	75%	25%		5	2
Sweet Potato	20%	46%	21%	3	3
Cassava	15%	9%	56%	1	1
Lettuce	14%	37%	23%	1	1
Kale	7%	36%	31%	1	1
Cabbage	42%	33%	15%	3	2
Pumpkin	8%	38%	27%	10	4
Garlic	72%	16%	4%	15	3
Boye	30%	30%	40%	2	1
Enset	30%	30%	40%	1	1
Fruits					
Banana	57%	29%	6%	5	2
Avocado	29%	35%	6%	1	1
Mango	21%	28%	35%	1	1
Orange	26%	52%	19%	6	2
Papaya	37%	44%	15%	5	2

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

Key Findings

- Cereals and processed grains: available grains include maize (80%), sorghum (80%), pasta (67%), and rice (66%). Limited availability is reported for barley (39%), wheat (29%), and teff (25%). Conversely, teff (15%), barley (15%), and wheat (10%) are reported as unavailable.
- Legumes and pulses: Sunflower (100%) and fava beans (76%) are reported as available. However, chickpeas (50%) and green peas (31%) have limited availability, while 16% of chickpeas are reported as not available in the market.
- Meat and Animal Products:Beef (80%) and camel meat (80%) are reported as available. Goat meat has limited availability at 44%, while lamb is reported as unavailable at 68%.
- Vegetables: Tomato (79%), onion (78%), and potato (75%) are reported as available. Limited availability is noted for sweet potato (46%), pumpkin (38%), lettuce (35%), and carrot (35%). Conversely, cassava (56%), boye (40%), and enset (40%) are reported as unavailable vegetables.
- Fruits: Banana (57%) and papaya (37%) are available. Limited availability is reported for orange (52%), papaya (44%), and avocado (35%). However, mango (35%) and orange (19%) are reported as unavailable.
- Beverages and Condiments: Coffee (100% available), but cooking oil (25%) and sugar (23%) have limited availability.
- Wash/NFI: Bath soap (82%) and laundry soap (81%) are available. Firewood (37%) and charcoal (31%) have limited availability. However, firewood (11%) is reported as unavailable.

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Key Messages

- For effective cash and voucher assistance, it is essential to prioritize staple foods that are most widely available, such as maize and sorghum, to ensure vulnerable households can access basic nutrition. Supporting access to moderately available staples like wheat and rice can help diversify diets and improve food security. Additionally, addressing gaps in less available items such as barley, pasta, and Teff will be crucial in providing comprehensive support.
- In terms of key protein sources, focus on ensuring access to highly available legumes like fava beans and lentils. Efforts should also aim to improve access to chickpeas and Harricot beans, which are more limited. Animal products, especially beef, camel meat, and cow milk, are generally accessible and should be prioritized, while strategies to increase availability of lamb and goat meat could further enhance dietary diversity for vulnerable populations.
- Supporting access to essential vegetables and fruits is vital. Tomatoes, onions, and potatoes are readily available and should be included in assistance programs.
- Additional support may be needed for greens such as kale and lettuce, which have low availability, as well as for fruits like mangoes and avocados, which are less accessible. Including hygiene items like soap, along with cooking essentials such as salt, sugar, and cooking oil, will help meet household needs comprehensively, while attention to the availability of firewood and charcoal can support cooking and heating requirements.

Table 3: Availability of Items in the Market, Available Stock and Time Needed to Restock in July 2025[11]

Item	Availability			Stock and Restock	
	Available (% KIs)	Limited Available	Not available	Days stock available	Days needed to restock
Beverage and Condiments					
Coffee	100%			18	2
Sugar	77%	23%		20	2
Salt	80%	19%		21	2
Cooking Oil	70%	25%	2%	15	2
None Food Items(NFI)					
Bath soap(125gm)	82%	17%	1%	18	2
Laundary Soap(200gm)	81%	17%	1%	16	2
Firewood	48%	37%	11%	11	2
Charcoal	68%	31%	2%	15	5

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Methodology

JMMI data was collected through key informant interviews with retailers in target markets, focusing on the 30 days prior. For July 2025, interviews in woreda capitals from July 9-23 involved at least three vendors per commodity. Median prices and stock levels were calculated per woreda and aggregated regionally and nationally.

The largest urban marketplace in each woreda is prioritized for data collection, with expansion to rural areas based on partner availability. A marketplace is defined as an area with a dense concentration of nearby traders. Field teams identify traders who sell directly to consumers, offer at least one item from the JMMI Basket, and are patronized by average consumers. They aim to collect at least three price quotes per item per 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 9-23 July 2025 . In July 2025, 25 of the Ethiopia Cash Working Group (CWG) JMMI partners conducted a total of 602 KIIs.

This round covered marketplaces sampled by partners nationwide based on their access and existing areas of intervention. A total of 79 out of 1,142 woredas in Ethiopia were included in this round.

Challenges and limitations

- The Central Ethiopia Region, Harari region and Dire Dawa City Adminstration were not assessed due to the unavailability of data collection partners.
- In July 2025, data for some items in Sidama, Afar, and Southwest Ethiopia were not collected, likely affecting the reported price changes. Also, monthly price changes haven't been calculated since some items were collected for the first time in July.
- All findings are indicative and not statistically generalisable at any level.

Participating agencies

- Association of Pastoralist Community for Change(APCFC)
- ACF (Action Against Hunger)
- ACTED
- Actionaid
- Ayuda en Acción Ethiopia
- CIFA ETS (Centro Internazionale per L'Infanzia e la Famiglia ETS)
- Concerned African Youth Organization (CAYO)
- Concern
- DCA (DanChurchAid)
- EECMY DASSC
- ERCS (Ethiopian Red Cross Society)
- Gayo Pastoral Development Initiative (GPDI)
- Generation for African Relief and Development Organization
- IRC (International Rescue Committee)
- LWF (Lutheran World Federation)
- NRC (Norwegian Refugee Council)
- ORDA Ethiopia
- Oxfam
- Pastoralist Concern (PC)
- Plan International
- REACH
- Save the Children
- Self Help Africa
- UNICEF
- World Vision International

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.

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@reach-initiative.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.

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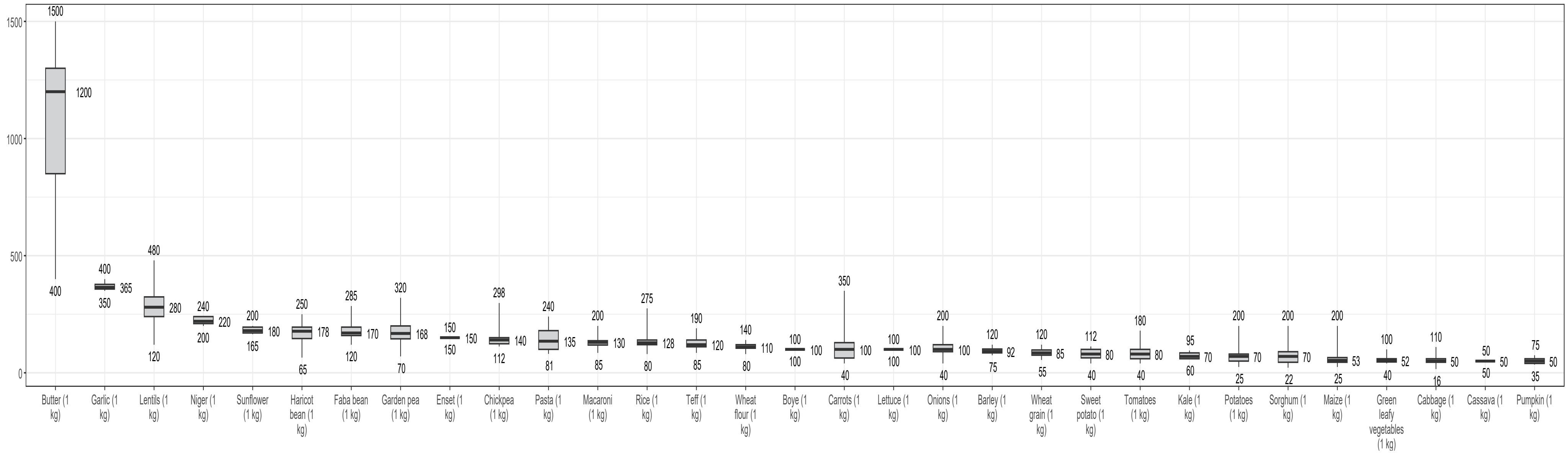
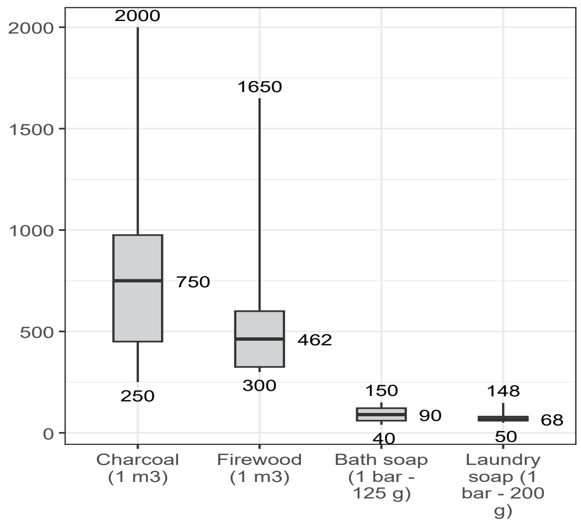
ANNEX 1: Distribution of Prices

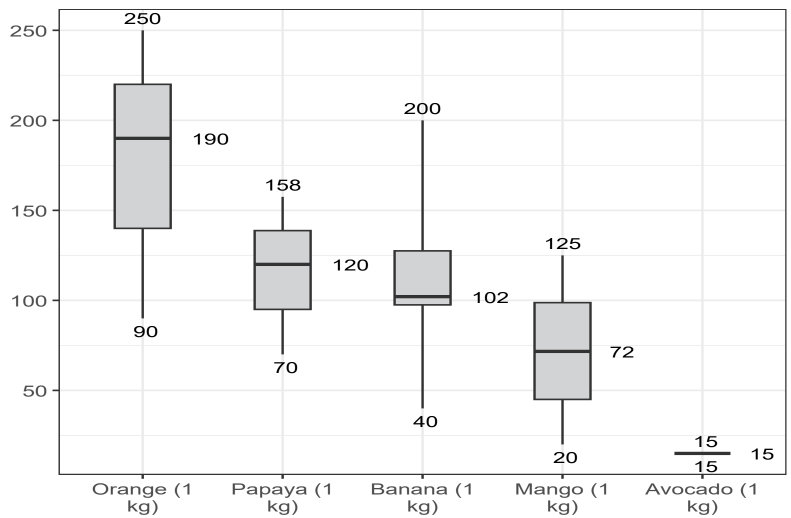
Food Items



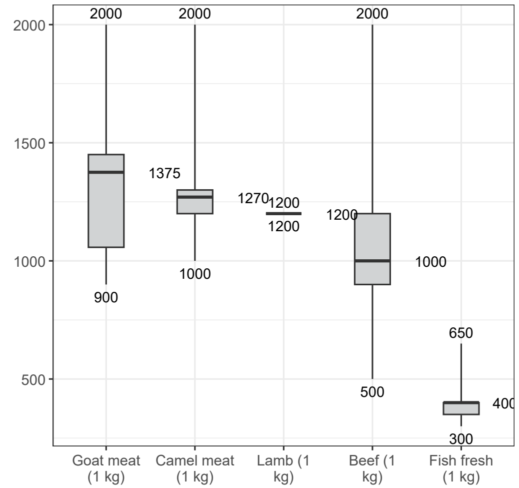
NFIs



Fruits



Meat and Fish Items



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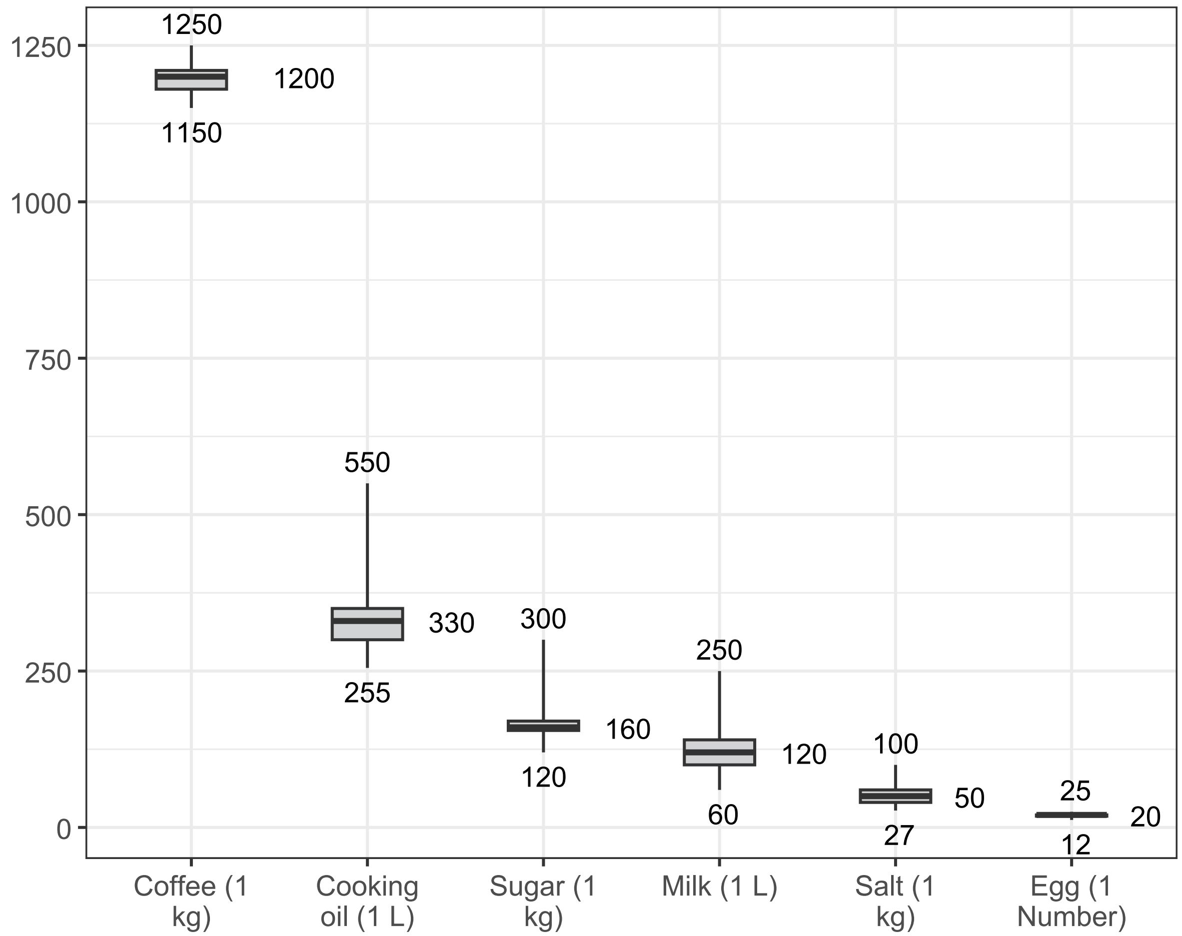
Other Food Items



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