

Dadaab and Kakuma Refugee Camp in Kenya | Joint Market Monitoring Initiative (JMMI)

Q2 (April - June, 2024)

MARKET OVERVIEW

INTRODUCTION

In January 2023, the Kenya Cash Working Group (KCWG) launched the Joint Market Monitoring Initiative (JMMI) for refugee camps in Kenya in an effort to understand the degree to which the refugee camps' markets are functional, integrated, and responsive to the needs of refugees. This factsheet presents price monitoring of essential items in the Refugee Minimum Expenditure Basket (MEB).¹

As of 30th June 2024, the refugee and asylum-seeker population in Kenya reached 777,354 persons.² Among them, 383,048 (49%) were in the Dadaab refugee camp and 289,861 (37%) in the Kakuma refugee camp.²

The survey was conducted between June 20th and July 3rd, 2024, following the cessation of the March-April-May (MAM 2024) long rains. Both counties that host the refugee camps, Turkana and Garissa, recorded positive impacts, such as vegetation regeneration from the rainy season.³ As a result of these rains, enhanced agricultural production likely contributed to improved food accessibility and a decrease in the prices of food commodities.⁴

Q2 2024 REFUGEE CAMP COVERAGE

368	Vendors interviewed
67	Commodities assessed
14	Markets assessed
5	Participating agencies
2	Camps assessed

KEY INDICATORS

Cost of Food MEB ¹	Cost of Non Food MEB ¹	Cost of MEB ¹
12,293 KES	4,503 KES	16,795 KES
88.62 USD ⁵	32.95 USD ⁵	121.56 USD ⁵
▼ 735 KES (6%) ⁶	▼ 341 KES (7%) ⁶	▼ 1,076 KES (6%) ⁶

ASSESSED REFUGEE CAMPS AND MEDIAN MEB VALUES

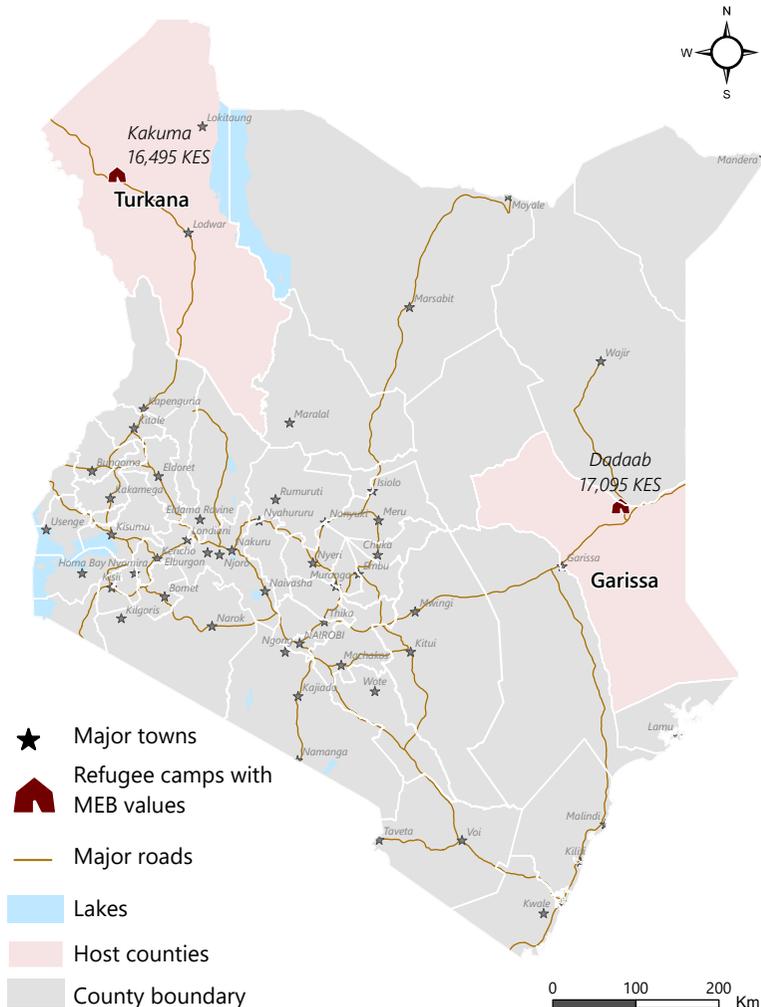


Figure 1: Map on the Q2 2024 assessed refugee camps and MEB values

KEY FINDINGS

- Compared to the [previous quarter](#)⁷, the median prices for both food and non-food items decreased, leading to a drop in the MEB¹ for both camps. This reduction in prices can be attributed to the positive impact of the 2024 MAM rains, which boosted agricultural productivity and subsequently drove down food prices.⁴
- The MEB¹ in Dadaab refugee camp decreased to 17,095 KES in Q2 2023, marking the largest drop (11%) in the past year. This decline mirrors a similar trend observed in the same quarter last year, where a 10% decrease was recorded. The Kakuma refugee camp MEB¹ was found to be 16,495 KES. Compared to the last quarter, it slightly decreased by 1%.
- The presence of any physical access barriers to markets was greatest in Dadaab refugee camp (44%) compared to Kakuma refugee camp (10%). This highlights the supply chain constraints experienced by vendors. In Dadaab refugee camp, over a quarter of the vendors had to depend on single suppliers, leading to increased prices and a higher risk of shortages if those suppliers faced commodity shortages.
- The market situation in Dadaab has deteriorated, with the Dagahaley market declining from full to poor functionality, while the Ifo and Hagadera markets downgraded from limited to poor functionality. In the Kakuma refugee camp, six out of the ten markets were classified as having limited functionality, while the remaining four were found to have poor functionality. This assessment highlights significant challenges in market operations and underscores the dynamic nature of market functionality in these camps.

REFUGEE MINIMUM EXPENDITURE BASKET (MEB) COST OF THE MEB IN KES AND CHANGE SINCE Q1 2024

The refugee MEB is composed of essential commodities and services. The MEB is used as an operational tool to quantify the average minimum cost of the culturally adjusted basket of basic items required to support a five-person household for one month. Developed by the Kenya Cash Working Group (KCWG) through the MEB work-stream, it differs from the rural MEB¹ by specifically considering refugee needs.

The refugee MEB¹ cost was calculated using food and non-food items (NFIs) that accrue on a monthly basis. Fixed amounts are used for health, transportation, and lighting energy costs. The cost of the refugee MEB serves as a proxy for a household's monthly expenditure on basic needs.

Camp	Food MEB	Change	NFI MEB	Change	MEB	Change
Dadaab	12,458	▼ 10%	4,638	▼ 12%	17,095	▼ 11%
Kakuma	12,128	▼ 1%	4,368	▼ 1%	16,495	▼ 1%

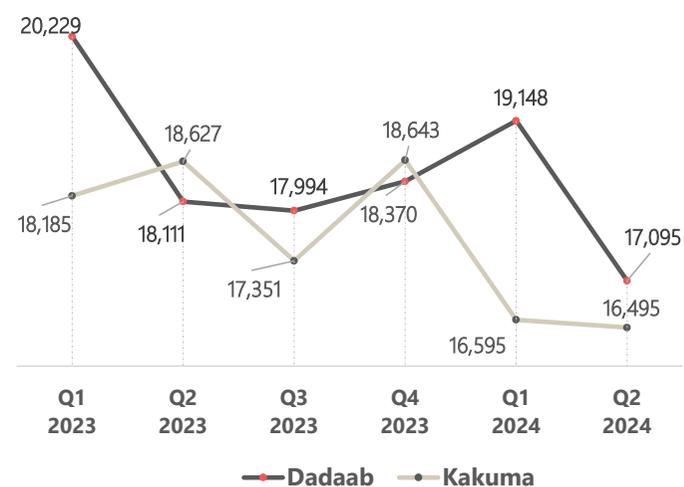
According to the Kenya National Bureau of Statistics (KNBS), producer prices for food products decreased by 6.5% during the quarter under review,⁸ potentially leading to lower food prices as businesses pass this relief on to consumers. This, coupled with a decrease in the average prices of staple food commodities,⁹ contributed to the reduction in the cost of the MEB in both camps. Additionally, the drop in the NFI MEB is attributed to the decline in the cost of school materials, likely due to the off-peak school season following the closure of the school term.

MEB REFUGEE COMPONENTS:¹⁰

Sector	Item	Quantity
Food items	Maize grain	21 kg
	Rice	21 Kg
	Wheat flour	21 Kg
	Dried beans	7.5 Kg
	Vegetable oil	5.25 L
	Cow milk, whole, not fortified	15 L
	Leafy vegetables, dark green	15 Kg
	Salt, Iodized	0.75 Kg
	Sugar	0.75 Kg
Kitchen ware	Cooking pots	2 pcs
	Frying pan	1 pc
	Cutlery	13 pcs
	Cups	5 pcs
	Plates	5 pcs
	Wooden spoon	1 pc
	Jug	1 pc
	Washing pad	1 pc
Health	National Health Insurance Fund	500 KES
Transport	Public transportation	1000 KES

Sector	Item	Quantity
WASH	Water	3,000 L
	Multi-purpose soap	2.75 Kg
	Toothpaste	0.140 L
	Toilet paper	8 pcs
	Sanitary pads (8 pads)	4 packs
	Toothbrush	10 pcs
	Inner wear	10 pcs
	Water storage containers (20 L)	5 pcs
	10 L bucket	3 pcs
	Sleeping mats	5 pcs
	Blankets	5 pcs
	Mosquito nets	5 pcs
Education	Water purification supply	150 tablets
	School material (pen, pencil, book, rubber, ruler, and sharpener)	1 kit
	Text books	30 pcs
	Geometrical set	3 sets
	School shoes	3 pairs
School Uniform	5 pcs	
School bag	3 pcs	

EVOLUTION OF THE MEB IN KES⁵ PER CAMP OVERTIME



Sector	Item	Quality
Shelter	Construction costs	7,000 KES
	Irons sheets	20 pcs
	Pine Timber/ Cyprus rafters	700 ft
	Eucalyptus poles	10 pcs
	Pine Timber/ Cyprus rafters	700 ft
	Eucalyptus poles	10 pcs
	Wood preservatives	20 L
	Tower and pad bolts	4 pcs
	Plastic sheets (5m by 4m)	6 pcs
	Ridge cap for roofing	4 pcs
	Eucalyptus/ Blue Gum poles 3m	10 pcs
	Hoop iron	2 Kg
	Butt hinges	3 pairs
Energy	Nails	10 Kg
	Roofing nails	7 Kg
	Sealing nails	1 Kg
	Charcoal	2 kg
	Jiko* - medium size	1 pc
Matchbox	2 Boxes	
Lighting cost	800 KES	

* Jiko is a cooking stove commonly used in Kenya.

MEDIAN PRICE IN KES AND CHANGE BETWEEN Q1 2024 AND Q2 2024 IN PRICES OF ITEMS PER CAMP

Items	Unit	Dadaab	Change ⁶	Kakuma	Change
Food items					
White maize	1kg	60	▼ 14%	60	0%
Maize flour	1kg	100	▼ 11%	80	▼ 11%
Wheat flour	1kg	100	▼ 17%	100	0%
Rice	1kg	100	▼ 23%	130	▼ 13%
Spaghetti	500g	80	▼ 3%	80	0%
Beans	1kg	140	0%	150	▼ 25%
Cowpeas	1kg	128	▲ 11%	155	0%
Cowpeas leaves	1kg	100	*	70	▼ 30%
Yellow split peas	1kg	100	0%	130	▼ 13%
Sugar	1kg	130	▼ 13%	150	▼ 17%
Vegetable oil	1lt	250	0%	250	0%
Salt	200g	10	0%	10	0%
Cattle milk	1lt	180	▼ 14%	160	▲ 100%
Camel milk	1lt	180	▼ 14%	200	0%
Goat meat	1kg	750	▼ 6%	700	0%
Camel meat	1kg	600	▼ 4%	600	0%
Onions	1kg	140	▼ 18%	180	0%
Tomatoes	1kg	90	▲ 38%	120	▲ 9%
Kale	1kg	120	▲ 20%	70	▼ 30%
WASH items					
Sleeping mat	1pc	300	▲ 20%	600	▼ 25%
Mosquito net	1pc	400	0%	500	▼ 58%
Tooth paste	50g	100	0%	80	▼ 20%
Tissue paper	1pc	50	▼ 50%	30	0%
Bar soap	200g	50	0%	50	0%
Jerry can	1pc	150	0%	200	▲ 33%
Bucket	1pc	170	▲ 6%	150	▲ 50%
Pads	1pc	100	0%	100	0%
Toothbrush	1pc	50	0%	30	▼ 40%
Inner wear for girls	1pc	100	▼ 50%	50	▼ 75%
Inner wear for female adults	1pc	150	▼ 40%	100	▼ 60%
Blanket	1pc	400	0%	350	▼ 30%
Cooking energy items					
Firewood	1 bundle	100	0%	60	▲ 20%
Charcoal	2kg	130	▲ 1%	*	*
Matchbox	2pc	5	0%	5	0%

Items	Unit	Dadaab	Change ⁶	Kakuma	Change
Education items					
Shoes (< five years boys/girls)	1pair	800	▲ 116%	900	▲ 350%
Shoes (5-12 years boys/girls)	1pair	1,000	▲ 54%	800	▲ 60%
Uniform girls	1pair	1,725	▼ 9%	800	0%
Uniform boys	1pair	1,400	▲ 8%	800	0%
Pencils	1pc	10	0%	10	0%
Pens	1pc	10	▼ 50%	10	▼ 43%
Exercise books	1pc	20	▼ 50%	15	▼ 50%
Rubbers	1pc	10	0%	10	0%
Socks	1pc	50	▼ 50%	50	▼ 50%
School bag	1pc	700	▲ 12%	550	▼ 15%
Ruler	1pc	30	0%	30	0%
Geometric set	1pc	200	▼ 20%	150	▼ 29%
Sharpener	1pc	10	0%	10	0%
Kitchen items					
Cooking pans	1pc	850	▼ 32%	500	0%
Knife	1pc	63	▼ 38%	100	0%
Spoon	1pc	20	0%	20	▼ 33%
Cup	1pc	100	0%	70	▲ 40%
Plate	1pc	150	0%	100	▼ 33%
Construction items					
Hoop iron	1pc	250	▲ 25%	250	0%
Tower bolt (4 inches)	1pc	100	0%	100	0%
Tower bolt (6 inches)	1pc	100	▼ 50%	150	0%
Pad bolt	1pc	150	▲ 50%	150	▲ 50%
Butt hinge (2 inches)	1pc	50	▼ 50%	30	▼ 50%
Butt hinge (4 inches)	1pc	100	▼ 50%	50	▼ 41%
Pine timber	1pc	55	▼ 24%	40	▼ 20%
Nails (2 inches)	1pc	250	0%	200	0%
Nails (3 inches)	1pc	250	0%	200	0%
Nails (4 inches)	1pc	250	0%	200	0%
Roofing nails	1pc	250	0%	250	▼ 17%
Sealing nails	1pc	250	0%	250	▼ 17%
Wood preservative	1pc	75	▼ 25%	70	▼ 86%
Eucalyptus	1pc	500	0%	220	▼ 12%
Corrugated iron sheets	1pc	1,500	▲ 25%	850	▼ 15%
Uncorrugated iron sheets	1pc	825	▼ 25%	*	*
Cement	1pc	1,100	▲ 7%	1,200	▲ 20%

* No price data collected as a result of unavailability of the respective commodity at the time of data collection to allow for comparison

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

Items ¹¹	Wide availability (%KIs)	Limited availability (%KIs)	Remaining stock (days)	Time needed to restock (days)
White maize	70%	30%	7	1
Maize flour	96%	4%	11	1
Wheat flour	100%	0%	10	1
Rice	100%	0%	10	1
Spaghetti	100%	0%	12	1
Beans	89%	7%	8	1
Cowpeas	63%	38%	9	1
Cowpeas leaves	100%	0%	0	1
Yellow split peas	56%	44%	7	1
Sugar	100%	0%	11	1
Vegetable oil	100%	0%	14	1
Salt	96%	0%	13	0
Cattle milk	81%	19%	1	0
Camel milk	92%	8%	1	1
Goat meat	96%	4%	1	1
Camel meat	93%	7%	1	1
Onions	96%	4%	5	1
Tomatoes	100%	0%	2	1
Kale	72%	28%	1	1
Sleeping mat	100%	0%	23	2
Mosquito net	96%	4%	23	2
Tooth paste	78%	19%	14	1
Tissue paper	65%	23%	15	1
Bar soap	100%	0%	12	1
Jerry can	96%	4%	21	2
Bucket	89%	11%	18	2
Pads	78%	19%	14	1
Toothbrush	78%	19%	14	2
Inner wear for girls	78%	22%	20	2
Inner wear for female adults	89%	11%	20	2
Blanket	96%	4%	25	2
Cooking pan	93%	7%	20	2
Knife	93%	7%	17	2
Spoon	93%	7%	17	2
Cup	100%	0%	21	2
Plate	100%	0%	15	1

* No price data collected as a result of 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 - KAKUMA

Items ¹¹	Wide availability (%KIs)	Limited availability (%KIs)	Remaining stock (days)	Time needed to restock (days)
White maize	91%	9%	14	1
Maize flour	100%	0%	14	1
Wheat flour	97%	3%	10	1
Rice	97%	3%	14	1
Spaghetti	97%	3%	14	1
Beans	67%	33%	30	1
Cowpeas	0%	100%	30	3
Cowpeas leaves	52%	48%	2	1
Yellow split peas	5%	95%	26	3
Sugar	97%	3%	14	1
Vegetable oil	95%	5%	14	1
Salt	100%	0%	60	1
Cattle milk	81%	19%	12	2
Camel milk	100%	0%	1	1
Goat meat	43%	57%	1	1
Camel meat	29%	71%	1	1
Onions	29%	71%	7	2
Tomatoes	44%	53%	3	1
Kale	25%	75%	2	1
Sleeping mat	15%	85%	60	2
Mosquito net	43%	57%	60	2
Tooth paste	100%	0%	30	1
Tissue paper	96%	4%	30	1
Bar soap	100%	0%	30	1
Jerry can	23%	77%	30	2
Bucket	43%	57%	30	2
Pads	92%	5%	30	1
Toothbrush	100%	0%	30	2
Inner wear for girls	65%	35%	30	2
Inner wear for female adults	60%	40%	30	2
Blanket	25%	75%	60	2
Cooking pan	44%	56%	60	2
Knife	56%	44%	60	2
Spoon	61%	39%	60	2
Cup	48%	52%	30	2
Plate	35%	65%	60	1

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

Items ¹¹	Wide availability (%KIs)	Limited availability (%KIs)	Remaining stock (days)	Time needed to restock (days)
Shoes (<five years boys/girls)	89%	11%	30	2
Shoes (5-12 years boys/girls)	96%	4%	30	2
Uniform girls	96%	4%	26	2
Uniform boys	100%	0%	30	2
Pencil	100%	0%	14	0
Pen	100%	0%	14	0
Exercise book	96%	4%	14	0
Rubber	93%	7%	14	1
Socks	96%	4%	20	2
School bag	93%	7%	21	2
Ruler	89%	11%	14	1
Geometric set	81%	19%	27	2
Sharpener	85%	15%	28	2
Firewood	71%	29%	3	2
Charcoal	17%	83%	4	2
Matchbox	100%	0%	14	2
Hoop iron	42%	58%	8	2
Tower bolt (4 inches)	48%	48%	3	2
Tower bolt (6 inches)	52%	48%	4	2
Pad bolt	56%	44%	5	2
Butt hinge (2 inches)	54%	46%	5	2
Butt hinge (4 inches)	68%	32%	2	2
Pine timber	65%	35%	3	2
Nails (2 inches)	68%	32%	6	2
Nails (3 inches)	71%	29%	11	2
Nails (4 Inches)	68%	32%	8	2
Roofing nails	69%	31%	3	2
Sealing nails	63%	37%	4	2
Wood preservative	59%	41%	10	1
Eucalyptus/ Blue gum	52%	48%	3	2
Corrugated iron sheet	69%	31%	3	1
Uncorrugated iron sheet	43%	57%	8	1
Cement	68%	32%	11	2

*No price data collected as a result of 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 - KAKUMA

Items ¹¹	Wide availability (%KIs)	Limited availability (%KIs)	Remaining stock (days)	Time needed to restock (days)
Shoes (<five years boys/girls)	36%	64%	60	2
Shoes (5-12 years boys/girls)	27%	73%	60	2
Uniform girls	36%	64%	60	2
Uniform boys	36%	64%	60	2
Pencil	92%	8%	60	1
Pen	97%	3%	30	1
Exercise book	82%	18%	60	1
Rubber	96%	4%	60	1
Socks	59%	41%	60	2
School bag	41%	59%	60	2
Ruler	75%	25%	30	1
Geometric set	41%	59%	60	2
Sharpener	78%	17%	60	1
Firewood	12%	88%	3	1
Charcoal	56%	44%	6	2
Matchbox	100%	0%	30	1
Hoop iron	22%	78%	30	2
Tower bolt (4 inches)	13%	88%	60	2
Tower bolt (6 inches)	7%	93%	60	2
Pad bolt	24%	76%	31	1
Butt hinge (2 inches)	27%	73%	60	1
Butt hinge (4 inches)	25%	75%	60	1
Pine timber	20%	80%	30	1
Nails (2 inches)	43%	57%	30	1
Nails (3 inches)	40%	60%	30	3
Nails (4 Inches)	38%	63%	30	2
Roofing nails	35%	65%	30	2
Sealing nails	33%	67%	40	2
Wood preservative	18%	82%	60	2
Eucalyptus/ blue gum	50%	50%	75	1
Corrugated iron sheet	24%	76%	30	1
Uncorrugated iron sheet	*	*	*	*
Cement	13%	88%	30	1

MAIN SUPPLY ROUTES

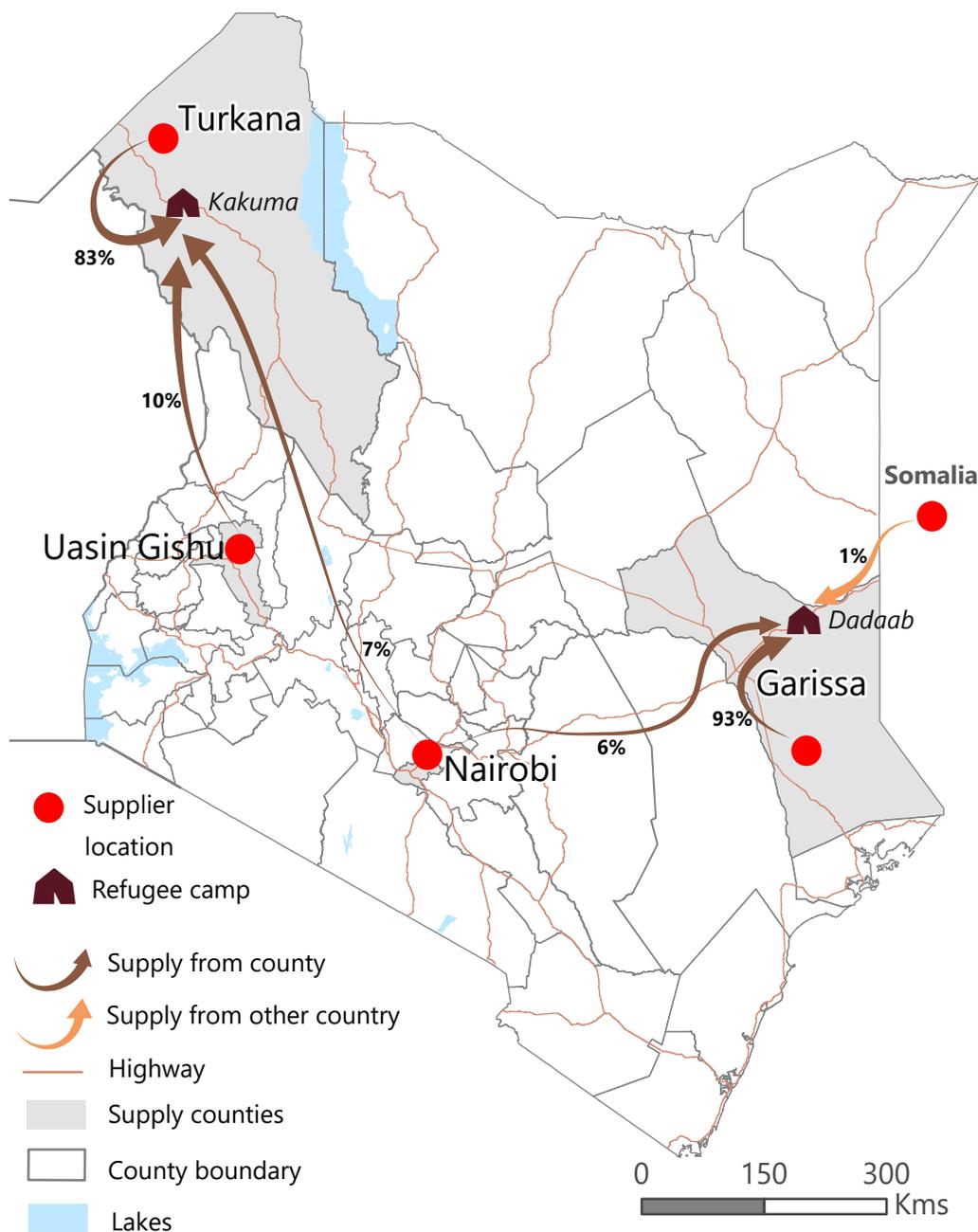


Figure 2: Map of main supply route of assessed refugee camps

LOCATION OF THE MAIN SUPPLIER

Figure 2 presents the supply route map, showing the supply routes of commodities from the main suppliers as reported by the interviewed vendors. These insights into the supply routes are crucial for determining markets' resilience.

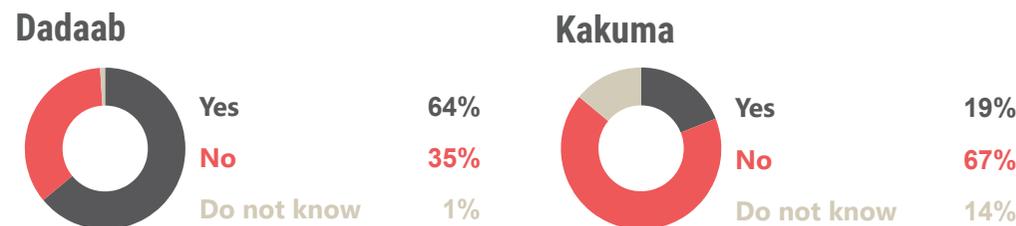
At the time of data collection, all vendors in Kakuma Camp and the majority (99%) of vendors in Dadaab camp indicated that their main supplier was located within the country, primarily within their respective counties. Some vendors, specifically 6% in Dadaab and 7% in Kakuma, reported sourcing their goods from Nairobi, the capital city. Additionally, 10% of vendors in Kakuma camp indicated that they sourced their goods from the county of Trans Nzoia, among the counties that are heavily reliant on agricultural production, such as maize, potatoes and vegetables.¹² Few vendors in Dadaab camp who source commodities from Somalia may face cross-border supply chain disruptions due to transportation issues or movement restrictions.

REPORTED PREDICTED CHANGES IN SUPPLIER'S PRICES

The findings indicate that most vendors in Kakuma (67%) reported being unable to predict changes in supplier prices within one month of data collection. Among those who could predict prices (19%), the majority (81%) expected prices to rise. In contrast, most vendors in Dadaab (64%) reported that they could predict changes in supplier prices, with nearly half (49%) anticipating a decrease in prices within one month of data collection.

The interruption of cash transfers to refugees and the significant reduction in food rations, which have decreased to 40%,¹³ may impact vendors' ability to predict prices. This reduction in food rations might alter the demand for certain food commodities and affect prices, leading to increased competition among vendors.

Proportion of vendors reporting on their ability to predict changes in supplier's prices for popular commodities in the one month after data collection, per camp:



Expectation of supplier price changes one month following data collection, by % of vendors (64% in Dadaab and 19% in Kakuma) who reported being able to predict supplier price changes, per camp:



SUPPLIER

Dadaab

Proportion of vendors depending on one supplier for food items.



Proportion of vendors depending on one supplier for non-food items.



Kakuma

Proportion of vendors depending on one supplier for food items.



Proportion of vendors depending on one supplier for non-food items.



A higher proportion of vendors in Dadaab camp (26% for food items and 31% for NFIs) compared to Kakuma camp, reported relying on a single supplier. Garissa County, host to Dadaab camp, experienced significant disruptions due to the heavy rains, which caused the River Tana to overflow, making roads impassable and hindering the transportation of commodities.¹⁴

ACCESS TO A LOCKED, SECURED STORAGE FACILITY

Most of the vendors (87% in Dadaab, 81% in Kakuma) had access to a locked secured storage facility for their commodities within the marketplace. Access to a secure storage facility may limit the likelihood of theft, vandalism, and damage of commodities. Vendors who do not have any access to a storage facility are vulnerable to theft and may adversely affect the profitability of the business.

Proportion of vendors reporting on access to a locked, secured storage facility in the 3 months prior to data collection, per camp:¹⁵

Dadaab

83% Yes, within my own business facilities

4% Yes, elsewhere within the marketplace

2% No, I store goods at my home

1% No storage facility

9% No, storage outside the marketplace at another facility

Kakuma

70% Yes, within my own business facilities

11% Yes, elsewhere within the marketplace

7% No, I store goods at my home

11% No storage facility

1% No, storage outside the marketplace at another facility

VENDOR CHALLENGES

Most reported challenges by vendors in the 3 months prior to data collection, per camp:¹⁶

Dadaab

1 45% Price increase by the supplier

2 32% Markets inaccessible due to floods

3 26% Lack of funds to restock

4 25% Infrastructural damage to facilities

Kakuma

1 66% Number of clients reduced

2 41% Price increase by the supplier

3 27% Lack of funds to restock

4 9% Markets inaccessible due to floods

Almost all vendors (98% in Kakuma and 96% in Dadaab) reported facing a variety of challenges, with a reduction in clients (66%)¹⁶ and price increases by suppliers (45%)¹⁶ being the most commonly cited issues in their respective camps. Additionally, 25%¹⁶ of vendors in Dadaab reported challenges related to infrastructural damage to their facilities, likely due to recent flooding in Garissa County. These issues underscore the complexities faced by local businesses in maintaining stable operations and ensuring sufficient access to goods.

Nonetheless, 44% of vendors in Dadaab reported an increase in the number of vendors operating within the marketplace compared to three months prior to data collection, while close to half (48%) of the vendors cited a decrease in the number of vendors in Kakuma.

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, per camp:

Dadaab



Kakuma



CHANGE IN THE NUMBER OF CUSTOMERS

A significant proportion of vendors in Dadaab (76%) and Kakuma (85%) reported a change in the number of customers purchasing from their shops in the 3 months prior to data collection. In Dadaab, more than half (55%) of those vendors reported a decrease in customers, while in Kakuma, 80% of the vendors experienced the same.

The primary causes for reduction in customers perceived by the vendors in Dadaab include a lack of transport options and damaged roads. In Kakuma, the main reported reasons were markets being inaccessible due to flooding and restricted movement. This decline in customer numbers suggests challenges for vendors in both camps, potentially leading to reduced income.

DIFFICULTY IN KEEPING THE BUSINESS OPERATIONAL AND WELL-STOCKED

More than half (54%) of the interviewed vendors in Dadaab and 58% of vendors in Kakuma reported that they faced difficulties in keeping their businesses well stocked.

Similar to the findings of the [previous quarter](#), challenges related to the availability of core goods and high supplier prices were reported more frequently in both camps, despite the observed decrease in commodity prices. These issues potentially affected their ability to purchase additional stock and compromised the profitability of their businesses.

Reported difficulty in keeping the business operational and well-stocked by vendors in the 3 months prior to data collection:¹⁶

Dadaab

- 31%** Difficulty with availability of core goods
- 25%** Difficulty with price charged by supplier
- 11%** Flooding in the marketplace
- 8%** Movement restrictions

Kakuma

- 50%** Difficulty with price charged by supplier
- 7%** Difficulty with availability of core goods
- 6%** Flooding in the marketplace
- 3%** Movement restrictions

SHORTAGE OF COMMODITIES:

Most (72%) of the interviewed vendors in Kakuma and over half (52%) in Dadaab reported a lack of or limited availability of some commodities. The top two reported causes of shortages in both camps were similar. The low demand for commodities can be attributed to the reported decrease in the number of customers, which vendors identified as a challenge. This may be a result of a decrease in consumers' disposable income and reduced spending.

Most reported causes of shortage of commodities by vendors (52% in Dadaab, 72% in Kakuma) at the time of data collection, per camp:¹⁶

Dadaab

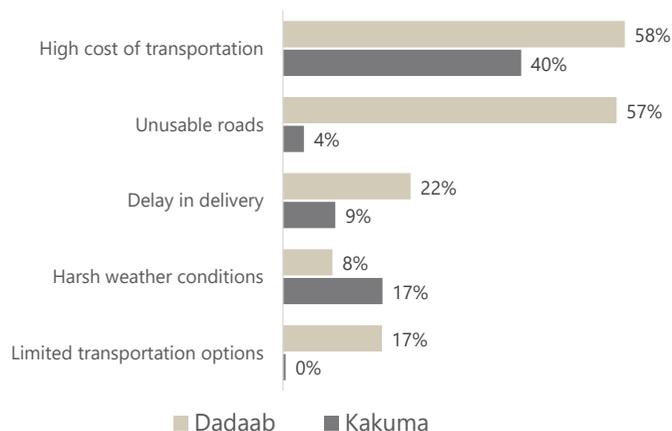
Increased market price	27%
Low demand for the commodities	22%
Inaccessible roads	20%

Kakuma

Increased market price	50%
Low demand for the commodities	15%
Lack of commodities by supplier	8%

CHALLENGES FACED WHEN TRANSPORTING COMMODITIES:

Most reported transportation challenges by vendors in the 3 months prior to data collection, per camp:¹⁶

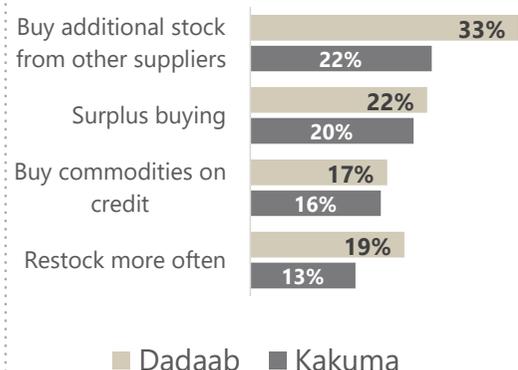


Across both camps, the most cited transport challenge is related to the cost of fuel, despite the decrease in price for petrol, diesel and kerosene.¹⁷ The high cost of transport may prompt businesses to pass this burden onto consumers by raising commodity prices. Vendors who reported sourcing from suppliers in more distant counties are likely to be significantly affected.

COPING MECHANISMS EMPLOYED TO DEAL WITH SHORTAGE OF COMMODITIES:

Vendors facing commodity shortages in the three months prior to data collection employed various coping strategies. The most common strategy, reported by 33%¹⁶ of vendors in Dadaab and 22%¹⁶ in Kakuma, was to change suppliers. Additionally, 17%¹⁶ of vendors in Dadaab and 16%¹⁶ in Kakuma resorted to purchasing commodities on credit to maintain inventory levels. However, a few (8%) of interviewed vendors did not have any coping mechanisms in place, leaving them vulnerable to revenue loss and business disruptions in the event of shortages.

Strategies employed by interviewed vendors to address unavailability of commodities at the time of data collection, by % of vendors (52% in Dadaab, 72% in Kakuma) who reported experiencing shortage of some commodities per camp:¹⁶



BARRIERS TO MARKET ACCESS

Physical barriers

The presence of physical access barriers was greater in Dadaab camp, where vendors reported obstacles related to damaged roads leading to the marketplace. These issues likely affected transportation options, with the lack of transportation becoming a subsequent barrier. In Garissa County, where Dadaab camp is located, heavy rains caused the River Tana to overflow, leading to significant disruptions.¹⁴

Marketplaces in Kakuma camp appeared to be accessible as 90% of vendors reported not facing any physical barriers. The most common physical barrier reported by vendors in Kakuma was the effects of the floods leading to inaccessible roads, curfews and movement restrictions imposed by authorities.

Most reported physical barriers to accessing the marketplace by vendors in the 3 months prior to data collection, per camp:¹⁶

Dadaab

- 56% No physical barriers
- 20% Damaged roads leading to the markets
- 20% Lack of transportation option
- 17% Limited operating hours of the market

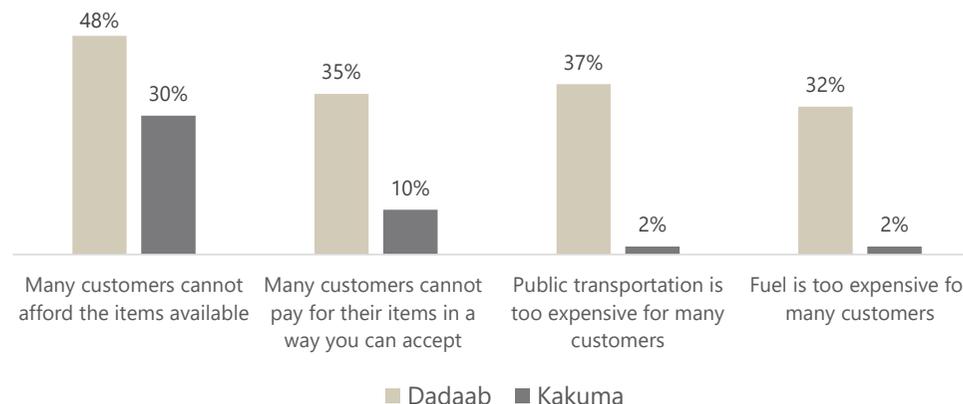
Kakuma

- 90% No physical barriers
- 4% Market inaccessible due to flooding
- 3% Curfew and movement restrictions
- 2% Limited operating hours of the market

Financial barriers

Three-quarters (75%) of vendors in Dadaab reported that their customers encountered financial difficulties, while a third (33%) of vendors in Kakuma observed similar financial barriers among their customers. Notably, affordability was cited as the primary financial challenge in both camps, affecting 48% of customers in Dadaab and 30% in Kakuma. This indicates that, although availability is not a major concern, the ability of customers to afford goods remains a significant issue.

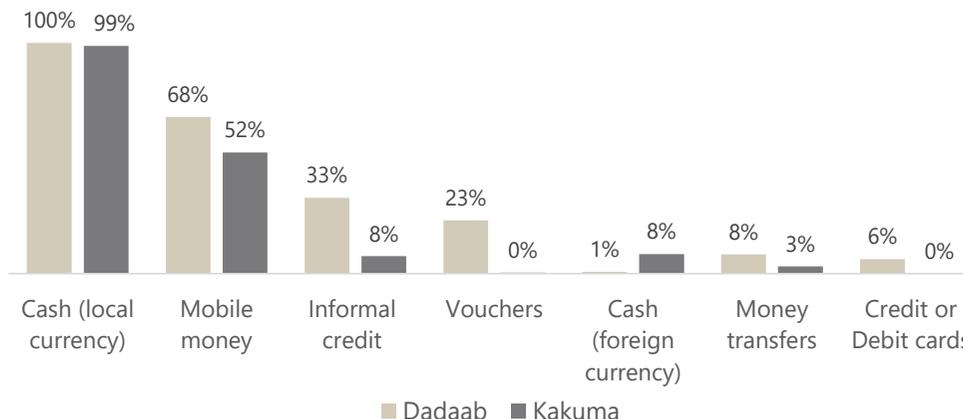
Most reported financial barriers to accessing the marketplace by customers as perceived by vendors in the 3 months prior to data collection, per camp:¹⁶



PAYMENT MODALITIES:

The prevalence of mobile money platforms in Kenya provides an alternative payment method to cash strengthening the financial infrastructure within the markets. In Dadaab, informal credit and vouchers were also used as payment by a proportion of the customers.

Most commonly reported accepted payment modalities, per camp:¹⁶



Social barriers

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

Dadaab



Kakuma



SECURITY ISSUES

Security issues were more prevalent in Dadaab, where nearly a third (31%) of vendors reported experiencing security threats. In contrast, 15% of vendors in Kakuma reported facing security issues that negatively impacted their businesses.

The most commonly reported security threat in Dadaab was related to the dangers on roads leading to the marketplace (11%), while in Kakuma, the most common issue was fear of robbery (7%).

MARKET FUNCTIONALITY SCORE (MFS)¹⁸, BY CAMP

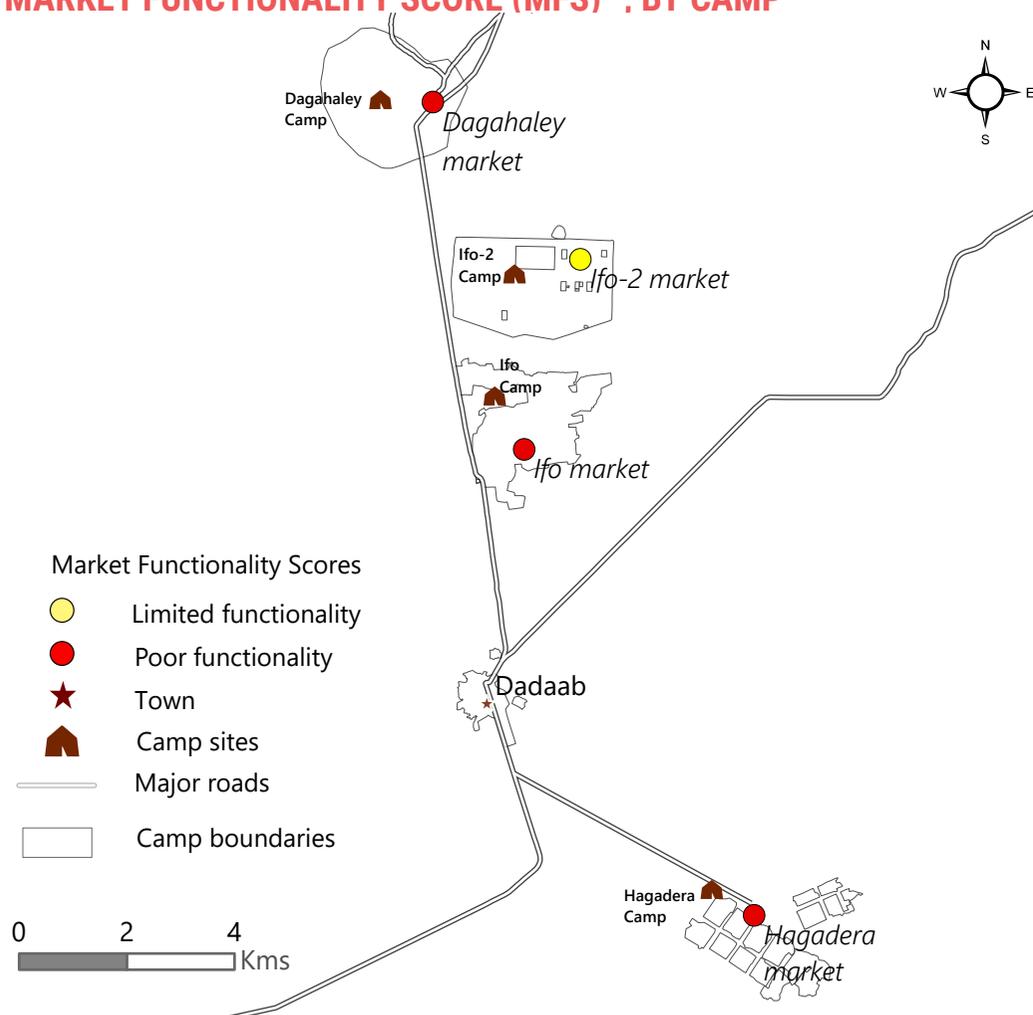


Figure 3: Map of market functionality of assessed markets in Dadaab

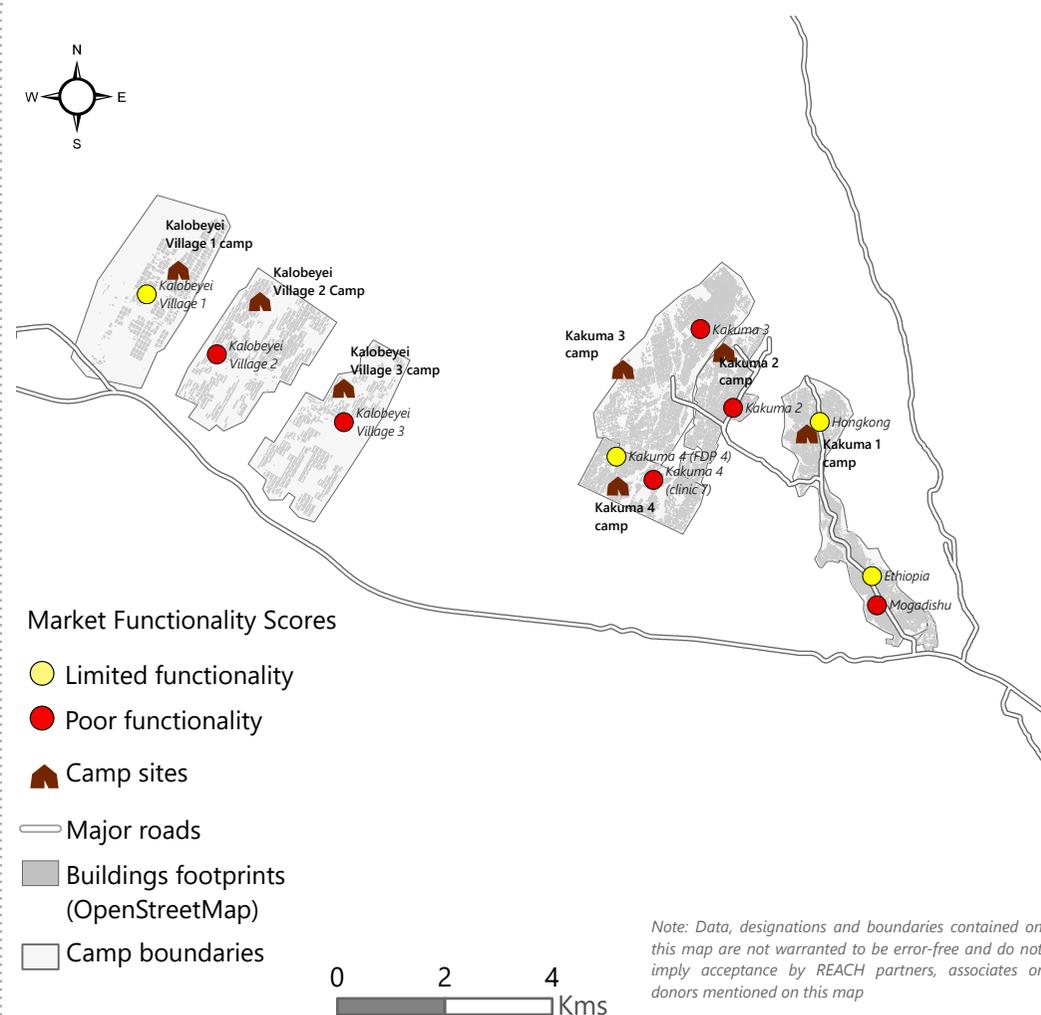


Figure 4: Map of market functionality of assessed markets in Kakuma

Note: Data, designations and boundaries contained on this map are not warranted to be error-free and do not imply acceptance by REACH partners, associates or donors mentioned on this map

Market functionality, as an extension of the JMMI, is a recurring assessment process. The Market Functionality Score (MFS)¹⁸ assesses markets across five key dimensions: accessibility, availability, affordability, resilience, and infrastructure. However, the MFS calculation is limited by the use of these five dimensions, which may not capture all relevant attributes. Markets with fewer surveys, often due to a lack of vendors or limited commodity variety, may affect their scores on availability and affordability, leading to a less favorable market classification.

In an analysis of the 14 markets assessed, no market was found to be fully functional. It was determined that three markets in Dadaab and six in Kakuma are operating with restricted capabilities. The Ifo 2 market in Dadaab was the only market within the camp operating at limited functionality. Accessibility and affordability were identified as the most poorly performing attributes in the three Dadaab markets classified as poorly functional, with 44% of vendors in the Dadaab camp reporting physical barriers to accessing the marketplace.

In Kakuma, more than half of the markets (six) were found to have poor functionality. Affordability and availability were identified as the main poorly performing attributes. Affordability is influenced by customers' ability to afford core items and predict future costs, while availability is determined by the presence of monitored items during the data collection period.

Methodology

The JMMI is conducted jointly with KCWG partners. The geographic coverage is determined by the access and capacity of participating partners. 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 interviews with vendors (vendors who sell directly to customers) in the targeted marketplaces. Enumerators were asked to record three prices per item in each targeted marketplace. Data was collected through the Kobo collect mobile application and was uploaded to a secure 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 purposive sampling, 368 vendors were interviewed as key informants (225 from Kakuma and 143 from Dadaab). At least three prices per item in each of the camps were collected for a total of 67 basic food and NFIs. The interviews were conducted both face-to-face and remotely with vendors selling food and non-food items. Data was collected between the 20th June and 3rd July 2024 across 14 markets (10 in Kakuma and 4 in Dadaab).

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 camp 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.
- For some questions, vendors were asked 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 requests the cheapest available type of each item to be recorded, as availability varies across the camps, price comparisons across the camps may be based on slightly varying products.
- Some vendors lacked weighing scales and owing to this, an estimation of how much forms a kilogram was done. This was for commodities such as vegetables, onions, and tomatoes. In some cases, the estimation may differ.
- 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.
- The quality of some of the assessed items differed, hence the high price variations e.g. kitchen ware.

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 Kenya Refugee Population by UNHCR, June 2024.

³ National Drought Early Warning Bulletin by NDMA, June 2024.

⁴ Kenya Update by FEWS NET, May 2024.

⁵ 1 USD-131.34 KES in June 2024.

⁶ Change since the last round of JMMI data collection in March 2024 (Q1 2024).

⁷ Refugee Camps Joint Market Monitoring Initiative, KCWG, March 2024.

⁸ Producer Price Index - Second Quarter by KNBS, June 2024.

⁹ Consumer Price Indices and Inflation Rates by KNBS, June 2024.

¹⁰ The Refugee MEB computation excludes non-recurring expenditures, such as kitchenware, shelter components, some WASH items (i.e., sleeping mats, inner wear i.e. underwear, blankets, mosquito nets, water, and water storage containers), education items (i.e. textbooks, geometrical sets, uniform, school bag, and school shoes). and water.

¹¹ The total percentages may not add up to 100% due to rounding up or respondents choosing "I do not know" or indicating "complete unavailability of commodity."

¹² Gross County Product by KNBS, 2023.

¹³ Kenya Country Brief by WFP, May 2024.

¹⁴ Road closure of Garissa and Madogo, KeNHA, April 2024

¹⁵ The total percentages may not add up to 100% due to respondents choosing "Prefer not to answer".

¹⁶ For multiple answer questions, respondents could select multiple options hence the findings may exceed 100%.

¹⁷ Retail Petroleum prices in Kenya by EPRA, June 2024.

¹⁸ Market functionality score 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; accessibility, availability, affordability, resilience, and infrastructure. The markets are categorized into "full functionality", "reduced functionality", "limited functionality", or "poor functionality".

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



Kenya
Red Cross



**World Food
Programme**

REACH Informing
more effective
humanitarian action