

Ethiopia | Joint Market Monitoring Initiative (JMMI)

30 December 2024 - 14 January 2025

MARKET OVERVIEW

INTRODUCTION

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

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

Data for the January round was collected using key informant interviews (KIIs) conducted in woreda capitals between 30 December 2024 and 14 January 2025. A minimum of three vendors were interviewed for each assessed commodity in each woreda. For commodity prices and stock levels, the median prices/stock levels are calculated for each item within each assessed woreda. The national and regional median prices are aggregated results of the woreda median prices.

KEY INDICATORS

Median Cost of JMMI Full Basket

12,592.56 ETB
100.22 USD¹
▼ ETB 166 -1%

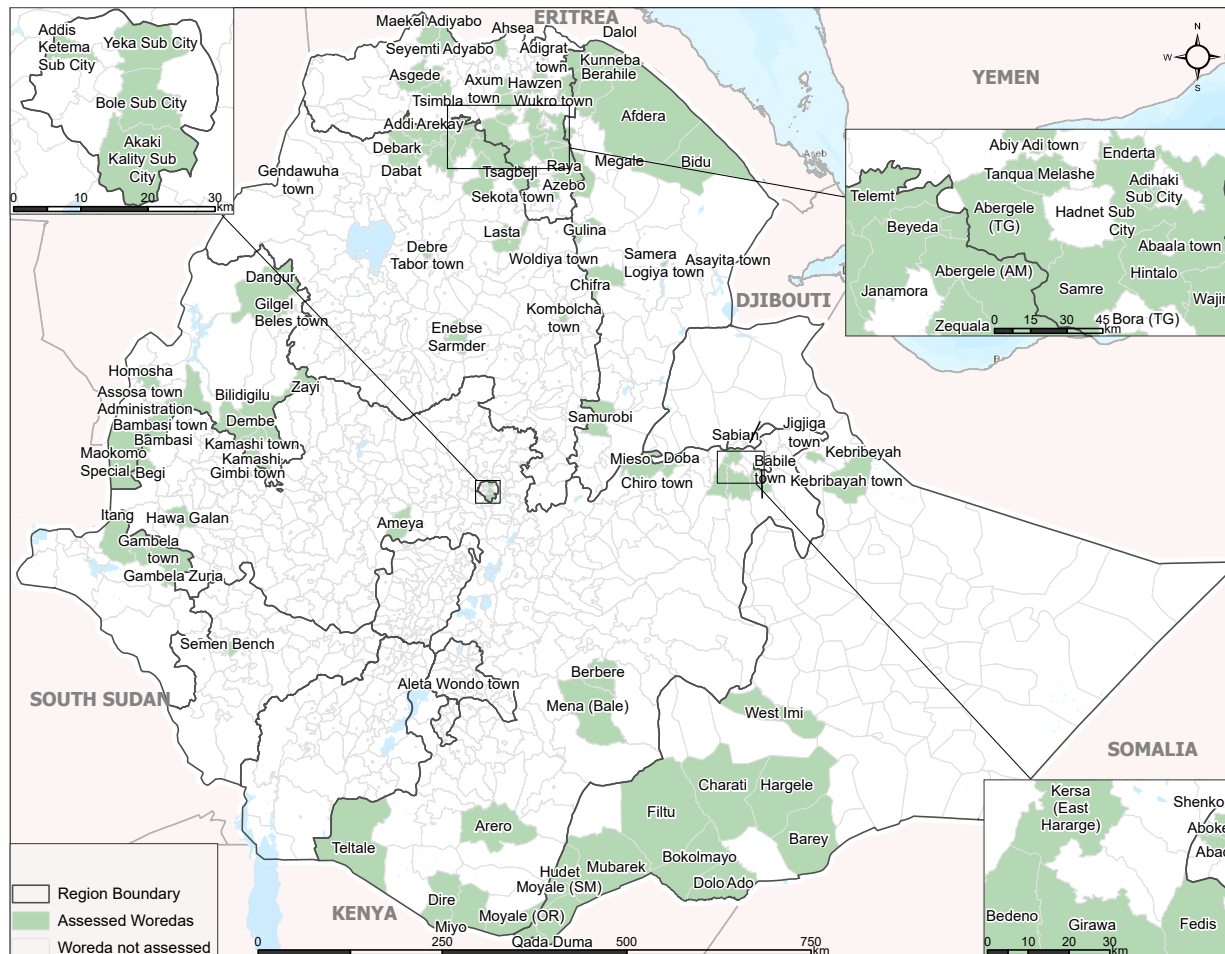
Median Cost of JMMI Food Basket

11,985.06 ETB
95.38 USD¹
▼ ETB 211 -2%

Median Cost of NFI Basket

607.5 ETB
4.83 USD¹
▲ ETB 45 +8%

Map 1: Assessed Marketplaces, By Woreda



Key Messages

- In January 2025, the national **JMMI full basket (-1%)** and **food basket (-2%)** prices declined compared to December 2024.
- The **prices of sorghum (+14%), lentils (+5%), green leafy vegetables (+10%), bath soap (+8%)** and **cooking oil (+7%)** have increased. The increase in these items' prices could be attributed to supply chain disruptions due to instability and the impact of the rising ETB-USD exchange rate.
- In January 2025, **61% of assessed markets were reported to have poor functionality**, while the remaining **39% experienced limited functionality**. This represents a slight change compared to December 2024, when **51% of markets had poor functionality and 49% had limited functionality**. **Availability and resilience issues** were the primary contributors to these challenges, potentially stemming from limited access to finance and insufficient production capacity to meet demand. These market constraints could have direct implications for CVA implementation.

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

Market Functionality Score (MFS)

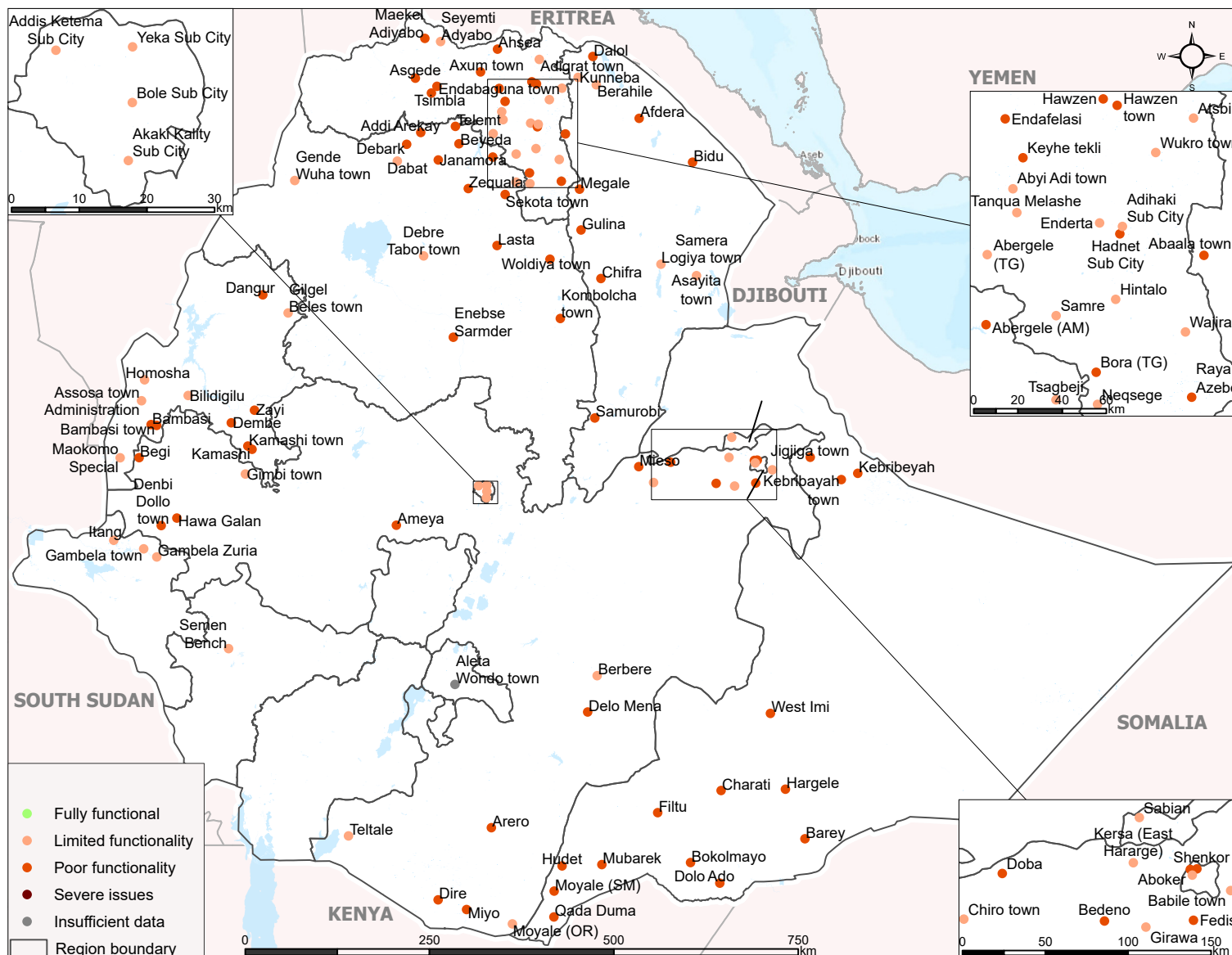
The Market Functionality Score (MFS) is a method of classifying markets based on their level of functionality, helping aid actors understand which markets function well enough to support cash and voucher assistance (CVA) and which may require alternative interventions. The MFS is divided into five dimensions:

- **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

- In January 2025, 61% of assessed markets were reported to have poor functionality, while the remaining 39% experienced limited functionality. This represents a slight change compared to December 2024, when 51% of markets had poor functionality and 49% had limited functionality.

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



JMIMI Basket

The JMIMI full basket is a set of food and hygiene items that represent some of the core monthly expenditures incurred by an average Ethiopian household (6 persons) in an average month (30 days). The food basket is designed to incorporate different sets of four staple crops in each region in order to reflect consumption patterns in the regions while the NFI basket consists of two hygiene items. The JMIMI basket is based in part on the Ethiopia Cash Working Group's effort to develop a Minimum Expenditure Basket (MEB) for the Somali region in 2020², it is not a complete MEB itself and does not reflect the full spectrum of regular household expenditures in Ethiopia. It can, however, be tracked over time to understand how household financial burdens are evolving.

Food Items

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

Non-Food Items

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

USD/ETB official exchange rate³

125.653 ETB

Food basket composition according to regional consumption patterns:

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

Table 1: JMIMI Full Basket Median Price Per Region

Region	Full basket median price in Jan (ETB)	Full basket median price in Jan (USD)	Full basket median price in Dec (ETB)	Full basket median price in Dec (USD)	Change since Dec 2024
Addis Ababa	12,450.5	99.09	12,187.75	100.06	▲ 2%
Afar	17,816.5	141.79	13,557.5	111.30	▲ 31%
Amhara	10,193	81.12	10,744.5	88.21	▼ 5%
Benishangul Gumuz	10,028.75	79.81	10,413.25	85.49	▼ 4%
Dire Dawa	10,576	84.17	11,278	92.59	▼ 6%
Gambela	13,191	104.98	12,574	103.23	▲ 5%
Harari	10,898	86.73	10,088	82.82	▲ 8%
Oromia	10,730.25	85.40	10,213.5	83.85	▲ 5%
Sidama	13,422	106.82	12,783.5	104.95	▲ 5%
South Ethiopia	NA	NA	NA	NA	NA
Somali	17,883.5	142.32	12,918.5	106.06	▲ 38%
SWE	13,600	108.23	9,905	81.32	▲ 37%
Tigray	10,584.5	84.24	10,751	88.26	▼ 2%
JMIMI full basket	12,592.56 ETB		100.22 USD ¹	▼ ETB 166	1%
JMIMI food basket	11,985.06 ETB		95.38 USD ¹	▼ ETB 211	2%

Key Findings

- In January, the national full basket cost showed a 1% decline while food basket cost decreased by 2% compared to December 2024.
- However, 8 of the 12 assessed regions experienced price increases, with the highest JMIMI full basket median price increase observed in Somali (+38%) since December 2024.
- Compared to the price in January 2024, the national JMIMI full basket median price increased by 17%.

ACCEPTED PAYMENT MODALITIES

Proportion of vendors reporting accepting different types of payment in the 30 days prior to data collection⁵:

- 98% Cash (ETB)
- 24% Mobile money
- 20% Mobile transfer

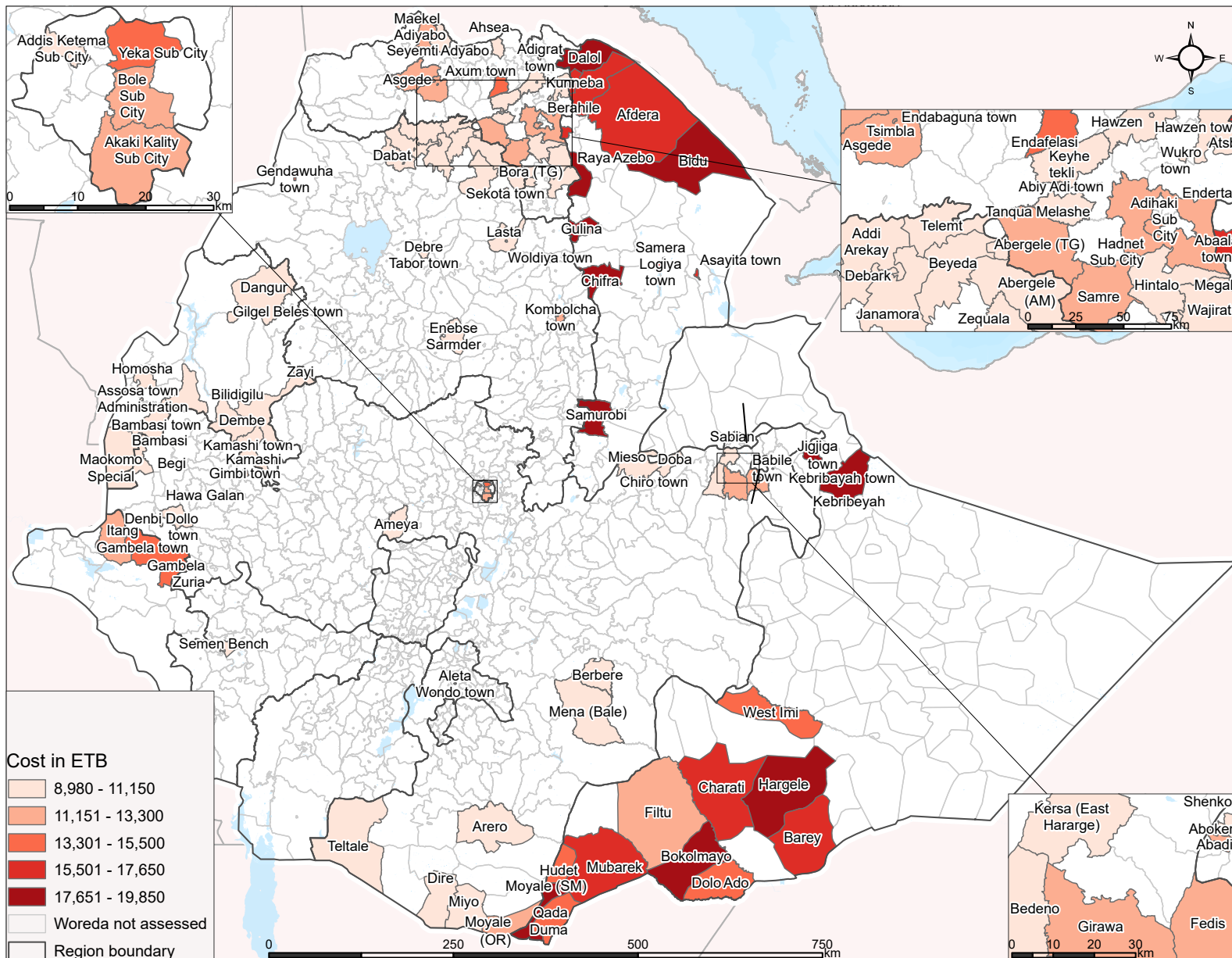
2. Minimum Expenditure Basket for Somali Region Guidance Note, June 2020. Additional sources consulted to assemble the JMIMI Basket include the Ethiopia Food Security and Water, Sanitation and Hygiene (WASH) sectors, World Food Programme (WFP) vulnerability analysis and mapping (VAM), and publications 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. Percentages do not add up to 100% as vendors were allowed to give multiple answers.

Map 3: Cost of JMMI Full Basket, By Woreda



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

- In January, sorghum (+14%) experienced increase despite a decline and stability in the prices of other cereals since December 2024.
- Prices of lentils increased by 5% compared to December 2024.
- In January, the prices of green leafy vegetables (+10%) increased compared to December 2024.
- Compared to December 2024, prices of bath soap prices saw an 8% rise in January 2025.
- Cooking oil prices continued to rise in January 2025, with a 7% increase compared to December 2024. This follows a 4% increase between November and December 2024.

Table 2: National and Regional Median Prices Per Item⁶

Item ⁷	National change since Dec 2024	National	Addis Ababa	Afar	Amhara	Benishangul Gumuz	Dire Dawa	Gambela	Harari	Oromia	Sidama	South Ethiopia	Somali	SWE	Tigray
Cereals⁸															
Maize	0	40	62.5	50	38	40	NA	50	45	37.5	40	NA	80	30	40
Sorghum	▲ 14%	60	80	65	45	37.5	NA	50	80	61			125		55
Teff	▼ 4%	120	125	130	110	130	NA	140	130	120	120	NA		135	120
Wheat	0	70	75		65	80	NA	130	65	60			114	70	60
Barley	▼ 14%	86.25		100							55	NA			
Enset	0	150									150	NA		150	
Rice	▼ 8%	130		140									120		
Pulses															
Garden peas	▼ 19%	120	160		130	147.5	NA	130	NA	92.5	NA	NA		40	110
Faba beans	▼ 10%	110	95		120	140	NA	120	NA	100	NA	NA		60	102.5
Lentils	▲ 5%	181.25	175		202.5	200	NA	270	NA	200	NA	NA		60	180
Meat and Fish															
Beef ⁹	0	800	1000		800	550	NA	900	700	850	700	NA		NA	800
Goat meat ⁹	▼ 11%	887.5		650									1100		
Camel meat ⁹	0	800											800		
Dry fish	0	280						280							
Vegetables															
Green leafy ⁹	▲ 10%	55	95	95	45	48.75	NA	40	NA	46.25	50	NA	150	50	60
Tomatoes ⁹	0	60	60	85	60	70	60	100	40	70	65	NA	100	70	40
Onions ⁹	0	100	87.5	110	100	120	100	130	80	105	125	NA	120	110	82.5
Potatoes ⁹	0	50	35	60	50	50	50	50	32	47.5	30	NA	60	40	50
Okra	0	70						70							
WASH															
Bath soap ⁹	▲ 8%	67.5	75	37.5	60	50	45	90	45	47.5	NA	NA	100	50	70
Laundry soap ⁹	NA	60	67.5	50	55	52.5	60	70	50	60	NA	NA	58.75	60	65
Sanitary pads	0	60	70	60	60	67.5	NA	70	NA	67.5	NA	NA	55	60	60
Water purification	▼ 2%	27.5	NA	NA	NA	25	NA	40	NA	27.5	NA	NA	NA	NA	25
Shelter NFIs															
Plastic bucket	▼ 4%	230	NA	350	200	180	NA	280	NA	240	NA	NA	380	150	200
Washing basin	▼ 22%	200	145	210	140	350	NA	230	NA	176.25	NA	NA	450	120	200
Education NFIs															
Exercise book	0	50	45	50	45	52.5	55	60	45	50	NA	NA	67.5	50	50
Pen/pencil	NA	20	15	30	25	30	NA	20	20	22.5	NA	NA	NA	30	15
Rubbers	0	15	17.5	10	8	20	NA	20	NA	15	NA	NA	12.5	15	12.5
Rulers	▼ 25%	30	25	22.5	26	35	NA	40	NA	30	NA	NA	15	15	25
Other															
Cooking oil ⁹	▲ 7%	277.5	260	300	260	240	240	265	300	275	NA	NA	272.5	250	280
Milk	0	100	50	100	80	157.5	120	120	100	85	NA	NA	90	100	95
Eggs ⁹	0	15	10.5	18	15	15.5	15	20	14	14.5	17	NA	25	20	15
Salt	0	35	27.5	42.5	35	40	30	47.5	30	35	NA	NA	60	30	35

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

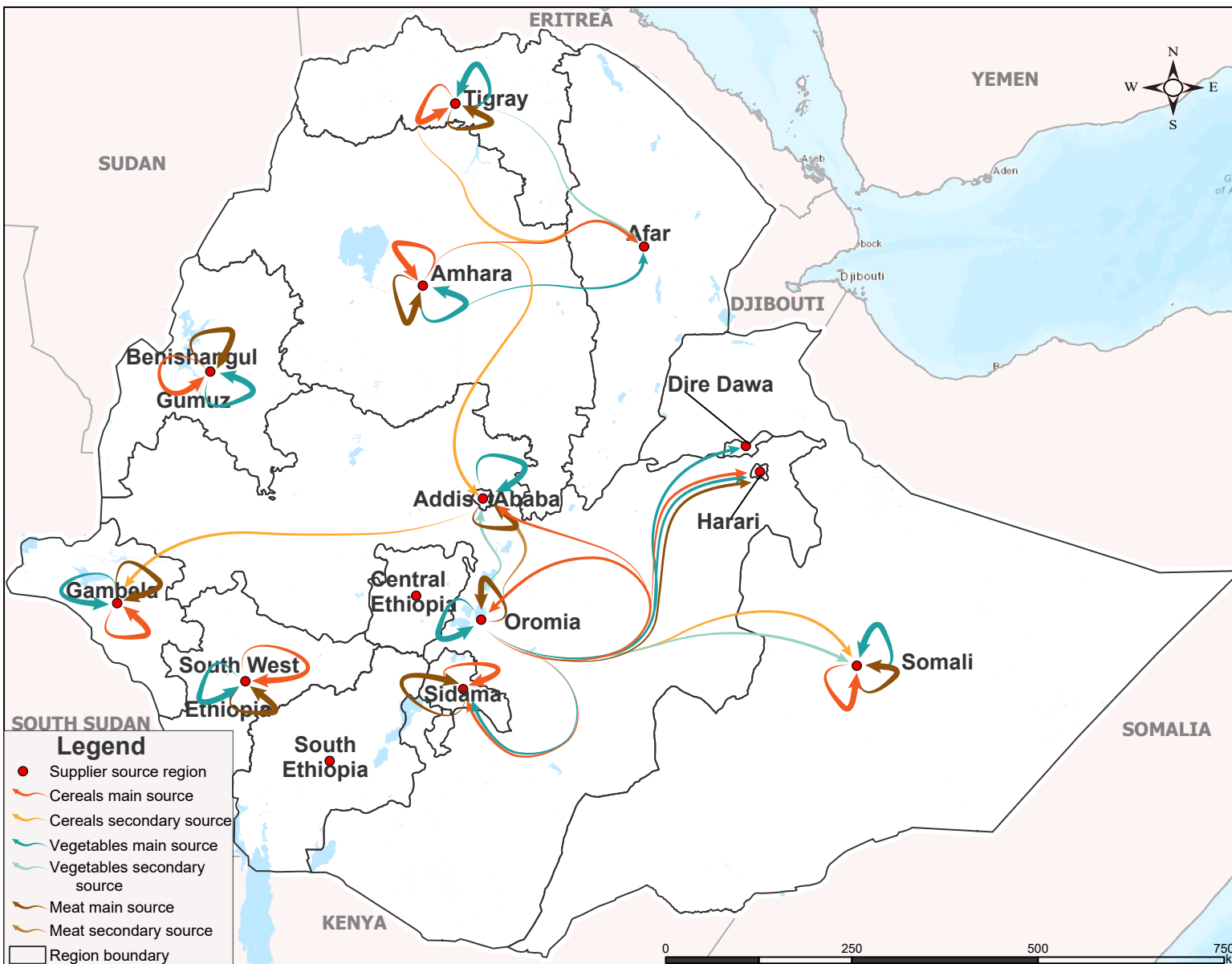
7. The 'NA' means data for certain items prices is not available for this month.

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

9. In January 2025, prices of cereals, pulses, shelter NFIs, education NFIs (exercise books), beef meat, sanitary pads, and water purification items were not collected in Dire Dawa. Additionally, prices of pulses, WASH NFIs, shelter NFIs, education NFIs, and other items were not collected in the Sidama region, while prices of pulses, green leafy vegetables, sanitary pads, water purification items, rulers, rubbers, and shelter NFIs were not collected in Harari., which could have likely affected the monthly price changes in Table 1 and Table 2.

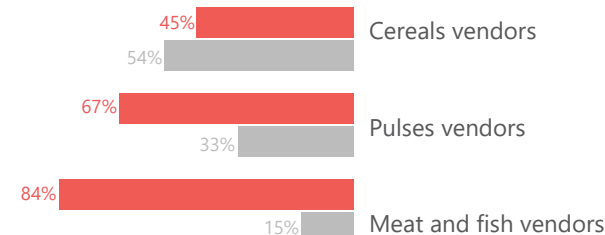
SUPPLY CHAIN AND MARKET ACCESSIBILITY

Map 4: Food Items Supply Route



LOCATION OF MAIN SUPPLIERS FOR FOOD ITEMS

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

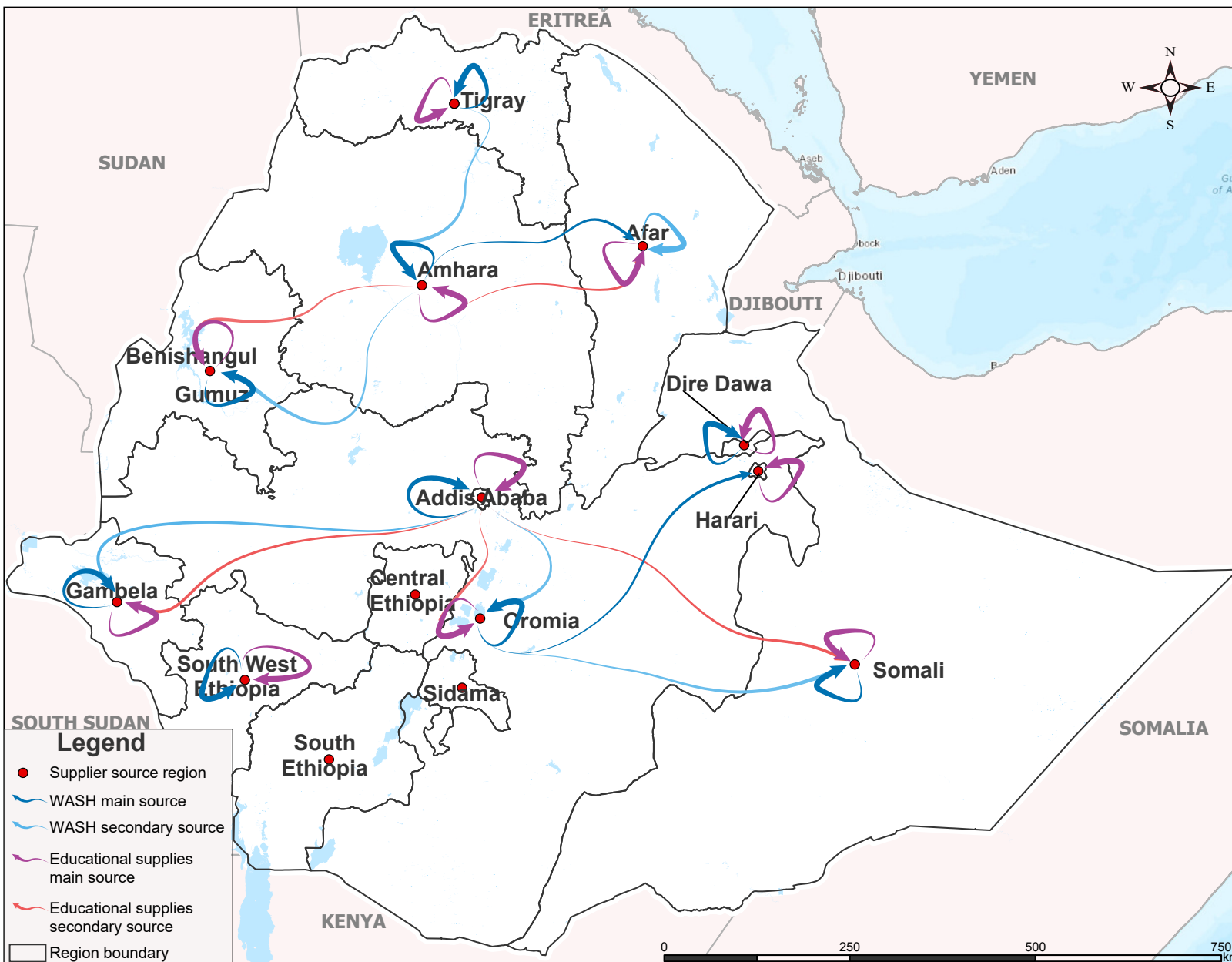


■ Yes, suppliers are located in the same marketplace
 ■ No, suppliers are located outside of the marketplace

Key Findings

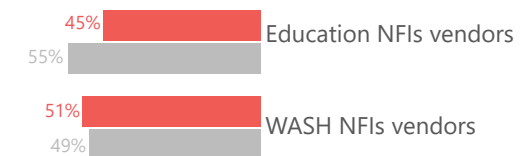
- In January, 38% and 17% of assessed cereal vendors in Afar and Addis Ababa, respectively, sourced their supplies from Amhara. Furthermore, 100%, 83%, 50%, and 29% of assessed vendors in Harari, Dire Dawa, Sidama, and Somali, respectively, reported that their main suppliers were located in Oromia.
- Assessed pulses vendors in Addis Ababa (92%) reported that they sourced from Oromia.
- In January 2025, 38% of assessed meat vendors in Addis Ababa reported sourcing meat from Oromia.

Map 5: NFI Supply Route



LOCATION OF MAIN SUPPLIERS FOR NON-FOOD ITEMS

Location of main suppliers of NFIs, by vendor type:



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

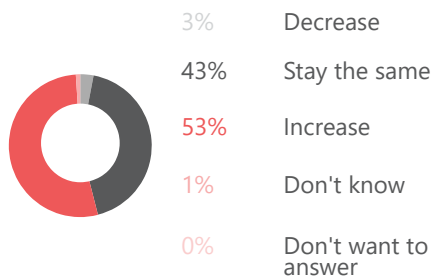
Key Findings

- In January 2025, assessed education NFIs vendors in Oromia (31%), Sidama (21%) and Somali (20%) sourced from Addis Ababa. Additionally, assessed education NFIs vendors in Afar (20%) and Benishangul-Gumuz (18%) reported that their suppliers were located in Amhara.
- In January 2025, 31%, 24%, and 11% of the assessed WASH NFI vendors in Gambela, Oromia, and Amhara, respectively, reported receiving their supplies from Addis Ababa. Additionally, 70% and 14% of assessed vendors in Afar and Benishangul-Gumuz indicated that their suppliers were located in the Amhara region, while assessed WASH NFI vendors in Harari (100%) Somali (42%) reported that their suppliers were located in Oromia.

VENDOR AND CUSTOMER DYNAMICS, PREDICTED PRICE CHANGES AND MARKET ACCESS

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

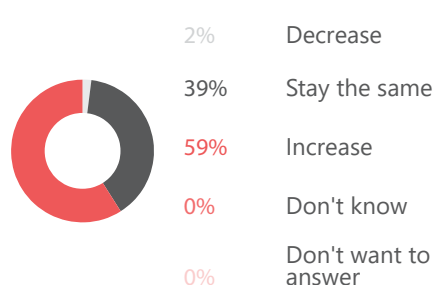
% of vendors reporting predicted price changes for food items in the 30 days following data collection:



Out of those vendors predicting an increase in food prices, the most frequently cited reasons were¹³:

- 1 71% Rising exchange rate
- 2 23% Customers demanding more of these items
- 3 18% Vendors cannot obtain these items

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

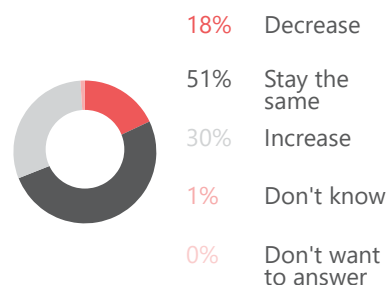


Out of those vendors predicting an increase in non-food item prices, the most frequently cited reasons were¹³:

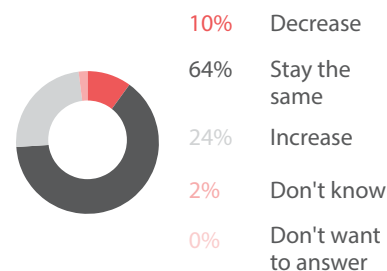
- 1 73% Rising exchange rate
- 2 17% Vendors cannot obtain these items
- 3 17% Roads blockage

CHANGE IN NUMBER OF CUSTOMERS AND VENDORS

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



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



BARRIERS TO MARKET ACCESS FOR CUSTOMERS

Customer groups that were reported to have faced difficulties visiting markets in the 30 days prior to data collection, by proportion of vendors (e.g., due to movement restrictions)¹³:

- 1 33% Women
- 2 30% Children
- 3 18% Chronically ill people

Proportion of the vendors reporting having observed or heard of any safety or security incidents in their market place in the 30 days prior to data collection¹³:

- 1 8% Fear of violence
- 2 8% Fear of robbery
- 3 8% Curfew
- 4 6% Fear of looting

DIFFICULTIES IN MEETING DEMAND AND TRANSPORTING OR PROCURING

35% (n=58) 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 were¹³:

- Not enough money (53%)
- Not enough credit (35%)
- Domestic transport restrictions (33%)

17% (n=25) 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 were¹³:

- Not enough money (63%)
- Not enough credit (50%)
- Producers producing less (37%)

20% (n=21) 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 were¹³:

- Producers producing less (50%)
- Not enough money (48%)
- Not enough credit (41%)

23% (n=9) 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 were¹³:

- Not enough money (62%)
- Not enough credit (62%)
- Producers producing less (43%)

¹³. Percentages do not add up to 100% as vendors were allowed to give multiple answers.

Table 3: Availability of Items in the Market, Available Stock and Time Needed to Restock in January 2025¹⁴

Item	Availability			Stock and Restock	
	Available (% KIs)	Limited Available (% KIs)	Not available (% KIs)	Days stock available	Days needed to restock
Cereals					
Maize	74%	23%	2%	17	5
Sorghum	52%	36%	2%	10	3
Teff	63%	28%	7%	15	5
Wheat	48%	32%	12%	14	5
Barley	71%	24%	5%	20	3
Enset	100%	0%	0%	3	2
Rice	88%	10%	0%	11	5
Pulses					
Garden peas	68%	26%	4%	7	3
Faba beans	68%	26%	2%	7	5
Lentils	69%	31%	0%	7	3
Meat and Fish					
Beef	75%	25%	0%	2	2
Goat meat	88%	12%	0%	1	1
Camel meat	87%	13%	0%	1	2
Dry fish	100%	0%	0%	5	3
Vegetables					
Green leafy	49%	34%	10%	3	2
Tomatoes	70%	26%	1%	4	2
Onions	76%	26%	0%	6	3
Potatoes	68%	30%	0%	5	3
Okra	100%	0%	0%	2	2
WASH					
Bath soap	85%	15%	0%	15	3
Laundry soap	82%	17%	1%	15	3
Sanitary pads	64%	22%	7%	20	3
Water purification	59%	27%	11%	15	5
Shelter					
Plastic bucket	80%	17%	2%	15	3
Washing basin	78%	18%	1%	15	3
Education					
Exercise book	82%	17%	1%	30	3
Pen/pencil	83%	17%	0%	15	3
Rubber	49%	27%	13%	19	2
Ruler	50%	25%	15%	15	2
Other					
Cooking oil	81%	19%	0%	13	2
Milk	61%	36%	2%	1	1
Egg	80%	19%	1%	5	2
Salt	86%	14%	0%	15	2

Key Findings

- All interviewed retailers reported 100% availability of enset, dry fish, and okra in January 2025.
- In January 2025, the highest rate of limited availability was reported for sorghum (36%), milk (36%), green leafy (34%), wheat (32%), and lentils (31%), with milk also experiencing limited availability (36%) in December 2024.
- In January 2025, the commodities facing the highest unavailability issues were ruler (15%), rubber (13%), wheat (12%), and water purification (11%). Water purification (13%) also experienced high levels of unavailability in December 2024.

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

Methodology

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

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

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

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

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

Data collection for this round took place between 30 December 2024 and 14 January 2025. In January 2025, 28 of the Ethiopia Cash Working Group (CWG) JMMI partners conducted a total of 930 KIIs. This round covered 287 marketplaces, which were sampled by partners nationwide based on their access and existing areas of intervention. This round includes 114 out of 1142 woredas in Ethiopia.

Challenges and limitations

- The Central Ethiopia and South Ethiopia regions were not assessed due to the unavailability of data collection partners.
- In January 2025, prices of cereals, pulses, shelter NFIs, education NFIs (exercise books), beef meat, sanitary pads, and water purification items were not collected in Dire Dawa. Additionally, prices of pulses, WASH NFIs, shelter NFIs, education NFIs, and other items were not collected in the Sidama region, while prices of pulses, green leafy vegetables, sanitary pads, water purification items, rulers, rubbers, and shelter NFIs were not collected in Harari, which could have likely affected the monthly price change reported in Table 1 and Table 2.
- All findings are indicative and not statistically generalisable at any level.

28	Participating agencies
12	Assessed regions
114	Assessed woredas
930	Key informant interviews (KIIs)
34	Commodities assessed

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.

Participating agencies

- ACF – Action Contre le Faim
- AIE – Action Aid Ethiopia
- ACTED – Agency for Technical Cooperation and Development
- APCFC – Association of Pastoralist Community for Change
- Ayuda en Acción Ethiopia
- CARE
- Caritas Switzerland
- DCA – Danish Church Aid
- EECMY DASSC
- ERCS – Ethiopian Red Cross Society
- GOAL
- GPDI – Gayo Pastoral Development Initiative
- Helvetas
- IRC – International Rescue Committee
- IRE – Islamic Relief Ethiopia
- LWF – Lutheran World Federation
- Mercy Corps
- MTI
- NRC – Norwegian Refugee Council
- Oxfam GB
- PC – Pastoralist Concern
- Plan International
- RHSPDO – Renaissance for Health and Socioeconomic Progress Development Organization
- SCI – Save the Children
- Self Help Africa
- UNICEF
- WHH – Welthungerhilfe
- WVI – World Vision International

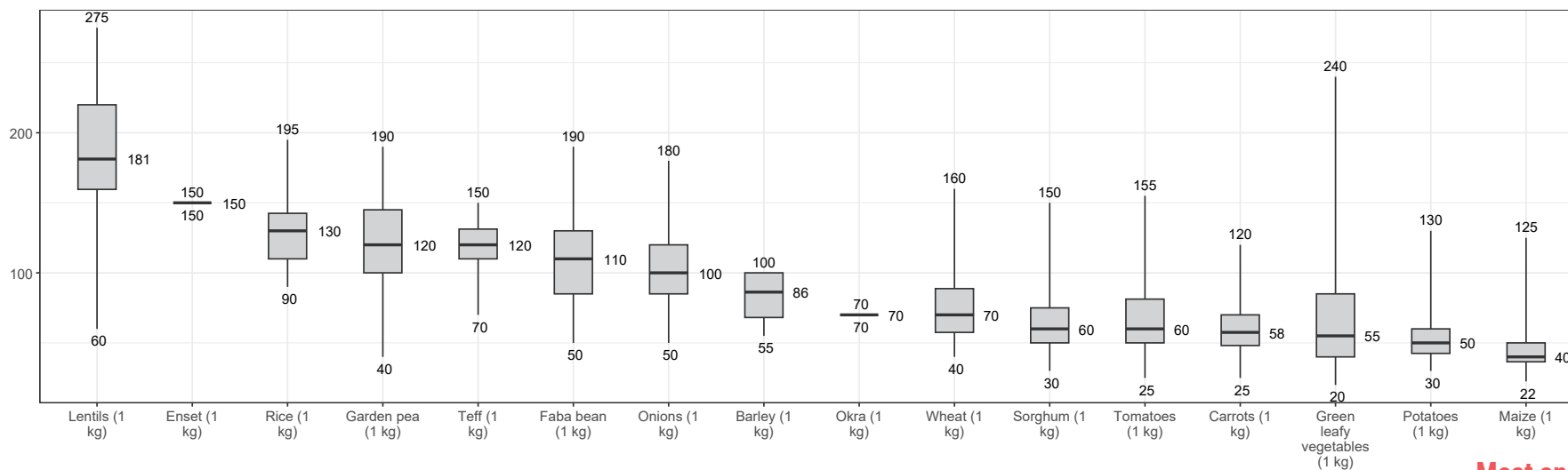
About REACH

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.

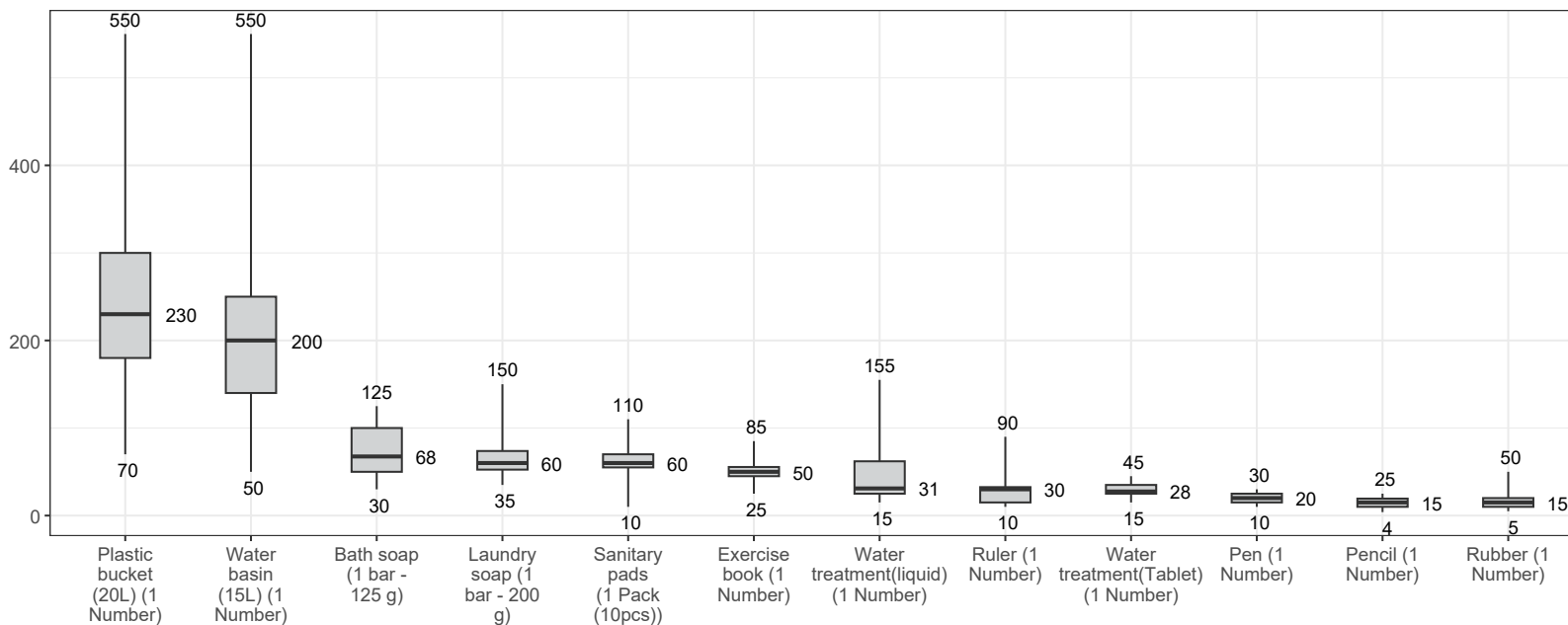
All the Ethiopia JMMI and other assessment outputs, including factsheets and datasets, are openly available on the [REACH Resource Centre](#).

ANNEX 1: Distribution of Prices

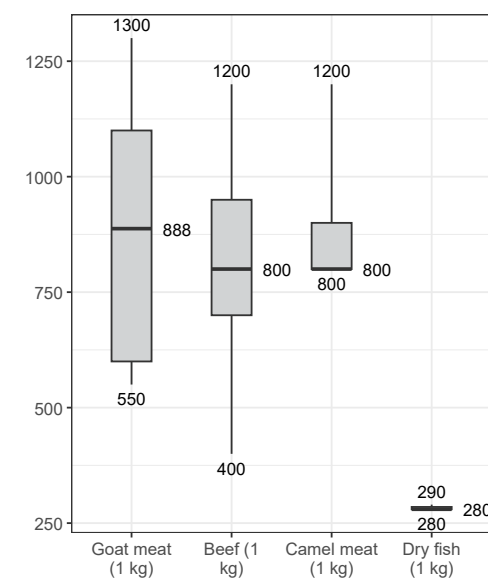
Food Items



NFIs



Meat and Fish Items



Other Food Items

