

INTRODUCTION

The aim of the Ethiopia JMMI is to provide regular, 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 (ACTED's initiative) in close collaboration with Ethiopia Collaborative Cash Delivery (CCD) Network 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, CCD members collect data from their respective areas of operation on a voluntary basis. CCD members formed a JMMI task force which reviews and validates the collected data. The geographical coverage of the exercise depends on the access of CCD members to priority areas of the country and their ability to collect data from these areas consistently.

Information is collected via key informant interviews (KIIs) with retail vendors in marketplaces frequented by average households. 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. Data for this JMMI round was collected between 2 and 11 October 2023 and is strictly indicative².

For more information on the methodology and the JMMI task force, please refer to the methodology section in Annex 1 on page 6.

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

Median cost of JMMI full basket

10207.61 ETB

185.48 USD¹

Change since September 2023

▲ **ETB 53 0.5%**

Median cost of JMMI Food basket

9690.11 ETB

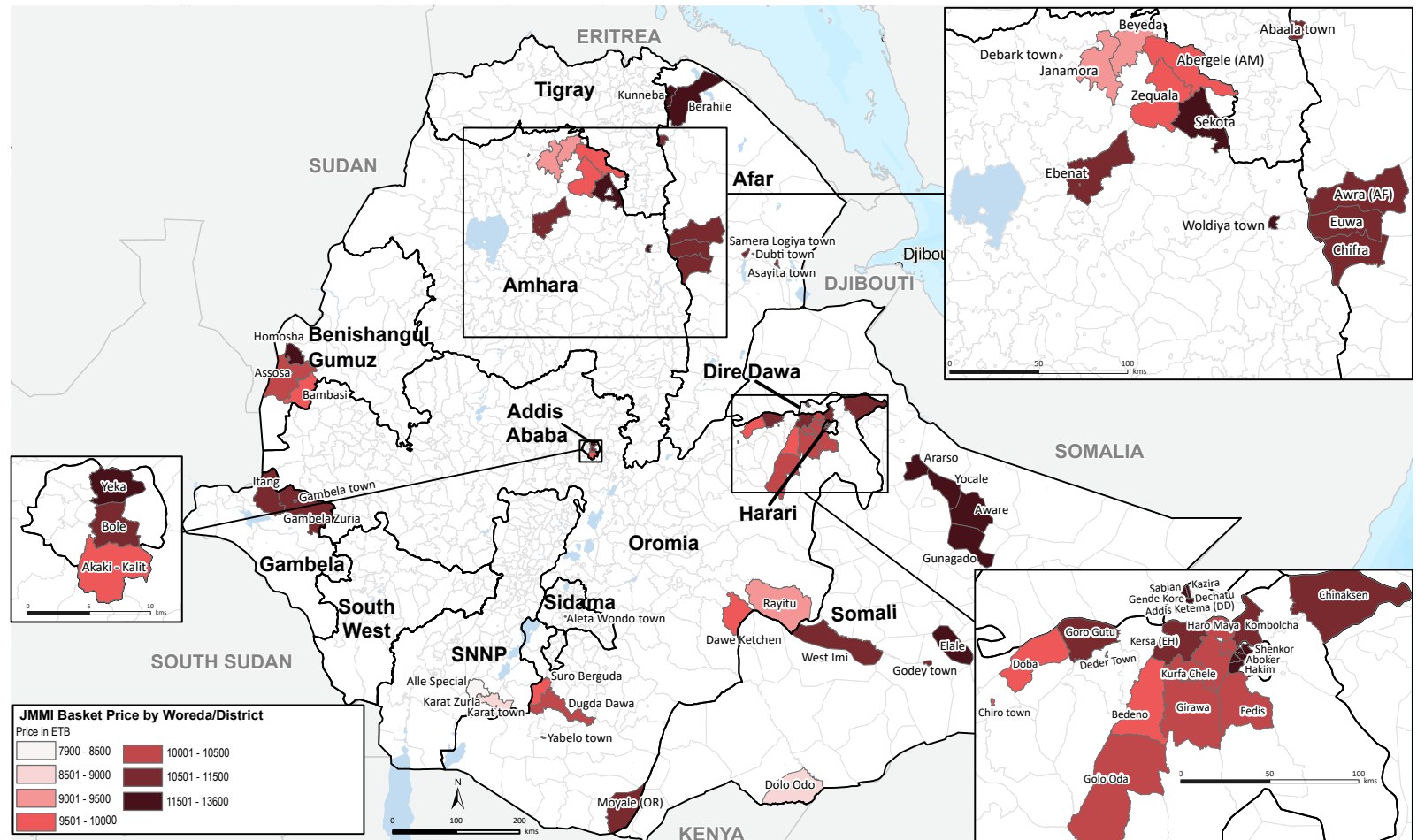
176.08 USD¹

Change since September 2023

▲ **ETB 75 0.8%**

12 participating agencies,
129 assessed marketplaces, in 68 woredas
across 11 regions, 598 KIIs with vendors

ASSESSED WOREDAS, OCTOBER 2023



Funded by the European Union



Collaborative Cash Delivery Network

REACH Informing more effective humanitarian action

KEY MESSAGES

- In October, the proportion of vendors who reported a decrease in the number of customers coming to their shop had increased to 7%, compared to a reported stable number of customers in September 2023.
- Among cereals, barley (+25%), teff (+13%) and wheat (+13%) were observed to have the largest increase in median prices at the national level since September 2023.
- Among the vegetables, onions (+63%) and potatoes (+13%) were observed to have the largest increase in median prices at the national level since September 2023.
- An overall JMMI full basket median price increase was observed in all regions, when compared to regional median prices observed in September 2023. These increases could possibly be attributed to the ongoing conflict in Amhara and some parts of Oromia regions, and the increasing demand for assessed commodities.

ETHIOPIA JMMI BASKET CONTENT

JMMI Food Basket

| | | | |
|------------------------|-----------|-------------|--------|
| Cereals and root crops | 72 kg | Cooking oil | 5.86 L |
| Meat | 2.7 kg | Onions | 5 kg |
| Eggs (local) | 18 pieces | Tomatoes | 5 kg |
| Green leafy vegetables | 5 kg | Potatoes | 3 kg |

JMMI Full Basket

| | |
|--------------|---------------|
| Bath soap | 3x 125 g bars |
| Laundry soap | 6x 200 g bars |

The JMMI basket is a selection of food and hygiene items that represents some of the core monthly expenditures incurred by an average Ethiopian household (6 persons) in an average month (30 days). It is designed to incorporate a different set of four staple crops in each region in order to reflect consumption patterns in that region. While the JMMI Basket is based in part on the Ethiopia Cash Working Group effort to develop a Minimum Expenditure Basket (MEB) for the Somali region in 2020,³ it is not itself a MEB 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.

USD/ETB buy rate¹

55.032 ETB

Assumptions:

1. The meat component is equally distributed among beef, goat, and camel when calculating the national-level JMMI basket. At regional, zone and woreda levels, meat prices were assessed as follows:

| | |
|------|--|
| Beef | Addis Ababa, Amhara, Benishangul Gumuz, Gambela, Oromia, SNNP ⁴ , Harari, Dire Dawa, Sidama |
|------|--|

| | |
|---------------------|--------|
| Beef and goat meat | Afar |
| Camel and goat meat | Somali |

2. When calculating the national-level JMMI basket, the cereal and root crop component is equally distributed among all seven staple cereals and root crops monitored (10.3 kg each). At regional, zone, and woreda levels, this component is equally distributed among the four specific staple cereals and/or root crops included in the basket for each region (18 kg each). KIs were queried about the cereal prices relative to their region as follows:

| | |
|-----------------------------|--|
| 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 | SNNP, Sidama |
|----------------------------|--------------|

TABLE 1: JMMI FULL BASKET MEDIAN PRICE PER REGION

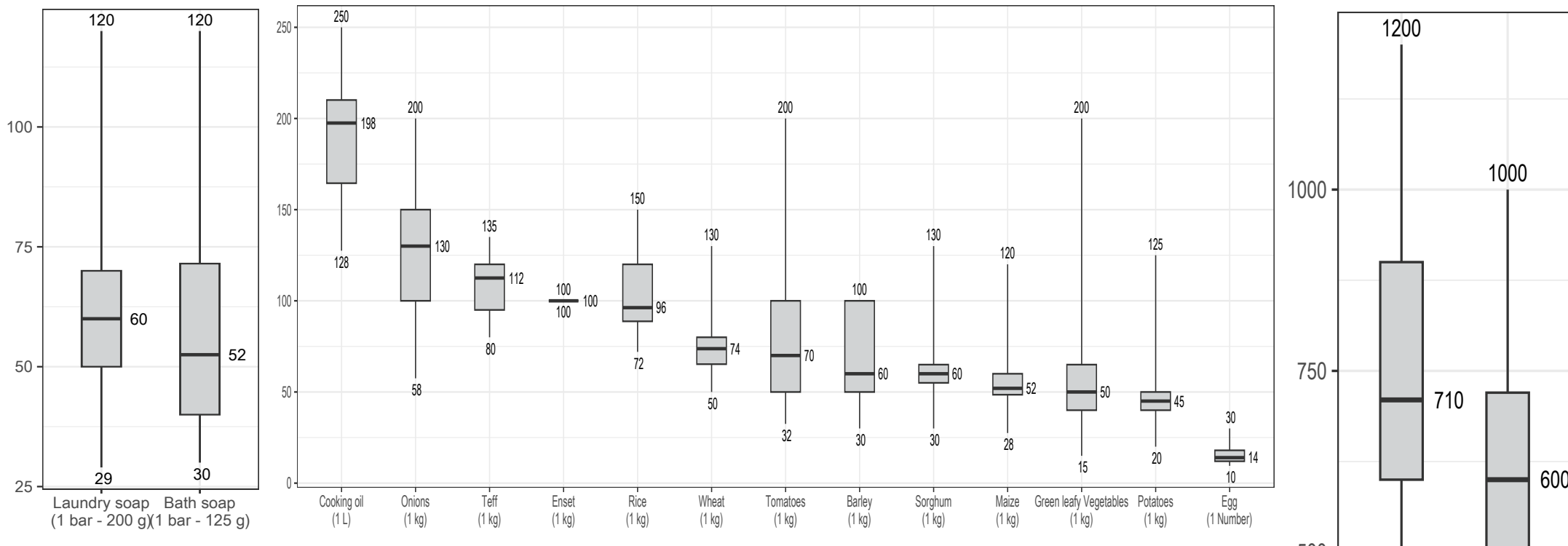
| Region | JMMI basket in ETB | JMMI basket in USD | Change since Sep round ⁵ | JMMI basket (Sep) in ETB | JMMI basket (Sep) in USD |
|-------------------------|--------------------|--------------------|-------------------------------------|-------------------------------|-------------------------------|
| Addis Ababa | 11327.32 | 205.83 | ▲ 2% | 11105.92 | 201.81 |
| Afar | 10966.52 | 199.28 | ▲ 4% | 10545.76 | 191.63 |
| Amhara | 10270.79 | 186.63 | ▲ 5% | 9799.16 | 178.06 |
| Benishangul Gumuz | 10403.07 | 189.04 | ▲ 10% | 9480.36 | 172.27 |
| Dire Dawa | 12843.99 | 233.39 | ▲ 3% | 12506.17 | 227.25 |
| Gambela | 10710.87 | 194.63 | ▲ 4% | 10289.58 | 186.97 |
| Harari | 11750.94 | 213.53 | ▲ 7% | 10987.05 | 199.65 |
| Oromia | 10130.10 | 184.08 | ▲ 6% | 9539.26 | 173.34 |
| Sidama | 10547.77 | 191.67 | ▲ 5% | 10038.08 | 182.40 |
| SNNP | 8339.49 | 151.54 | ▲ 2% | 8188.51 | 148.80 |
| Somali | 11264.26 | 204.69 | ▲ 2% | 11091.65 | 201.55 |
| JMMI full basket | | | 10207.61 ETB | 185.48 USD¹ | ▲ ETB 53 ▲ 0.5% |
| JMMI food basket | | | 9690.11 ETB | 176.08 USD¹ | ▲ ETB 75 ▲ 0.8% |

TABLE 2: NATIONWIDE MEDIAN PRICE PER ASSESSED ITEM

| Item | Unit | Price in ETB | Price in USD | Change since Sep round | Price (Sep) in ETB | Price (Sep) in USD |
|----------------------|-----------|--------------|--------------|------------------------|--------------------|--------------------|
| Food Items | | | | | | |
| Maize | 1 kg | 52 | 0.94 | ▲ 4% | 50 | 0.91 |
| Sorghum | 1 kg | 60 | 1.09 | 0% | 60 | 1.09 |
| Teff | 1 kg | 112.5 | 2.04 | ▲ 13% | 100 | 1.82 |
| Wheat | 1 kg | 73.75 | 1.34 | ▲ 13% | 65 | 1.18 |
| Barley | 1 kg | 60 | 1.09 | ▲ 25% | 48 | 0.87 |
| Enset | 1 kg | 100 | 1.82 | 0% | 100 | 1.82 |
| Rice | 1 kg | 96.25 | 1.75 | ▲ 7% | 90 | 1.64 |
| Beef | 1 kg | 710 | 12.9 | ▼ 6% | 752.5 | 13.67 |
| Goat meat | 1 kg | 600 | 10.9 | 0% | 600 | 10.90 |
| Camel meat | 1 kg | | | NA | 600 | 10.90 |
| Leafy vegetables | 1 kg | 50 | 0.91 | ▲ 3% | 48.75 | 0.89 |
| Tomatoes | 1 kg | 70 | 1.27 | ▼ 13% | 80 | 1.45 |
| Onions | 1 kg | 130 | 2.36 | ▲ 63% | 80 | 1.45 |
| Potatoes | 1 kg | 45 | 0.82 | ▲ 13% | 40 | 0.73 |
| Eggs (local) | 1 egg | 14 | 0.25 | ▲ 8% | 13 | 0.24 |
| Cooking oil | 1 L | 197.5 | 3.59 | ▲ 1% | 200 | 3.63 |
| Hygiene Items | | | | | | |
| Bath soap | 125 grams | 52.5 | 0.95 | ▲ 13% | 60 | 1.09 |
| Laundry soap | 200 grams | 60 | 1.09 | 0% | 60 | 1.09 |

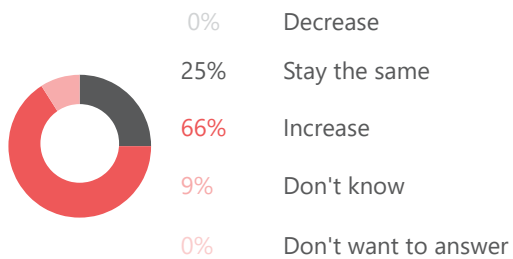
3. Minimum Expenditure Basket for Somali Region Guidance Note, June 2020. Additional sources consulted to assemble the JMMI Basket include the Ethiopia Food Security and Water, Sanitation and Hygiene (WASH) sectors, World Food Programme (WFP) vulnerability analysis and mapping (VAM), and publications by the Global WASH Cluster, Famine Early Warning System Network (FEWS NET), and the Food and Agriculture Organization of the United Nations (FAO).
4. Southern Nations, Nationalities and Peoples' Region

PRICE VARIATIONS FOR JMMI BASKET ITEMS (ETB)



REPORTED PREDICTED CHANGE IN PRICE OF FOOD ITEMS

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

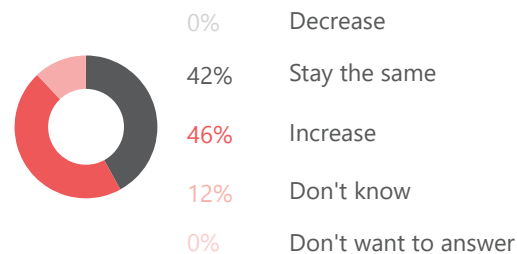


Out of those vendors predicting an increase in food prices, the most frequently cited reasons were:⁵

- 1** 60% Rising exchange rate
- 2** 53% Customers will demand more of these items
- 3** 37% Customers will run out of these items

REPORTED PREDICTED CHANGE IN PRICE OF HYGIENE ITEMS

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



Out of those vendors predicting an increase in hygiene item prices, the most frequently cited reasons were:⁵

- 1** 81% Rising exchange rate
- 2** 49% Customers will run out of these items
- 3** 40% Customers will demand more of these items

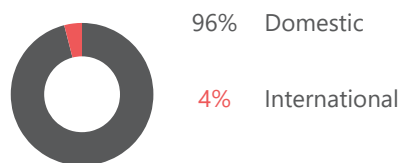
5. Percentages do not add up to 100% as vendors were allowed to give multiple answers.



LOCATION OF MAIN SUPPLIERS FOR FOOD AND HYGIENE ITEMS

54% of vendors reported that their main supplier of food items was located in the same woreda as them.

Proportion of vendors by reported origin of their main supplier's for food items (out of the 45% of the vendors whose suppliers were not located in the same woreda):



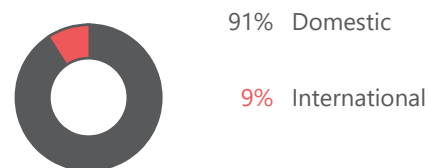
45% of vendors reported that their main supplier of food items was not located in the same woreda as them.

Proportion of vendors whose main food supplier was not located in the same woreda by reported region where the supplier is located:

- 48% Oromia
- 17% Amhara
- 9% Somali
- 6% Afar
- 5% Gambela

44% of vendors reported that their main supplier of hygiene items was located in the same woreda as them.

Proportion of vendors by reported origin of their main supplier's for hygiene items (out of the 52% of the vendors whose suppliers were not located in the same woreda):



52% of vendors reported that their main supplier of hygiene items was not located in the same woreda as them.

Proportion of vendors whose main hygiene supplier was not located in the same woreda by reported region where the supplier is located:

- 20% Amhara
- 20% Oromia
- 16% Addis Ababa
- 8% Harari
- 8% Somali

DIFFICULTIES TO MEET DEMAND AND TO TRANSPORT OR PROCURE SUPPLIES

16% (n= 84) of vendors reported having faced difficulties obtaining enough food items to meet demand in the 30 days prior to data collection.

17% (n= 25) of vendors reported having faced difficulties obtaining enough hygiene items to meet demand in the 30 days prior to data collection.

The three most frequently cited reasons for food items supply were:⁵

- 1 57% (n= 48) Producers producing less
- 2 48% (n= 40) No enough money
- 3 43% (n=36) No enough access to credit

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

BARRIERS TO MARKET ACCESS FOR CUSTOMERS

Customer groups that were reported to have faced difficulties visiting market places in the 30 days prior to data collection, by proportion of vendors e.g., due to movement restrictions:⁶

- 1 25% People with disabilities
- 2 17% Chronically ill
- 3 16% Older persons
- 4 10% 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.

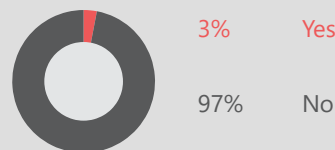


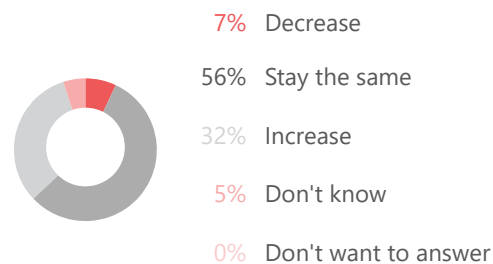
TABLE 3: AVAILABILITY OF ITEMS IN THE MARKET, AVAILABLE STOCK AND TIME NEEDED TO RESTOCK AT THE TIME OF DATA COLLECTION

| Item | Available (% KIs) | Limited (% KIs) | Not available (% KIs) | Item ⁸ | Stock available for (days) | Restock in (days) |
|-------------------------------|-------------------|-----------------|-----------------------|----------------------|----------------------------|-------------------|
| Food items⁷ | | | | Food items | | |
| Maize | 63% | 28% | 8% | Maize | 14 | 4 |
| Sorghum | 42% | 48% | 10% | Sorghum | 10 | 3 |
| Teff | 47% | 42% | 12% | Teff | 10 | 5 |
| Wheat | 45% | 37% | 17% | Wheat | 8 | 3 |
| Barley | 25% | 45% | 23% | Barley | 21 | 3 |
| Rice | 50% | 25% | 17% | Rice | 13 | 3 |
| Enset | 8% | 20% | 53% | Enset | 1 | 1 |
| Beef | 69% | 22% | 10% | Beef | 2 | 1 |
| Goat meat | 100% | 0% | 0% | Goat meat | 1 | 1 |
| Camel meat | 25% | 25% | 50% | Camel meat | 5 | 1 |
| Eggs (local) | 60% | 24% | 11% | Eggs (local) | 5 | 3 |
| Leafy vegetables | 59% | 34% | 7% | Leafy vegetables | 3 | 2 |
| Onions | 63% | 38% | 0% | Onions | 5 | 3 |
| Tomatoes | 61% | 39% | 0% | Tomatoes | 4 | 2 |
| Potatoes | 73% | 27% | 0% | Potatoes | 5 | 3 |
| Cooking oil | 82% | 16% | 0% | Cooking oil | 12 | 3 |
| Hygiene items | | | | Hygiene items | | |
| Laundry soap | 85% | 15% | 0% | Laundry soap | 15 | 3 |
| Bath soap | 83% | 15% | 0% | Bath soap | 15 | 3 |

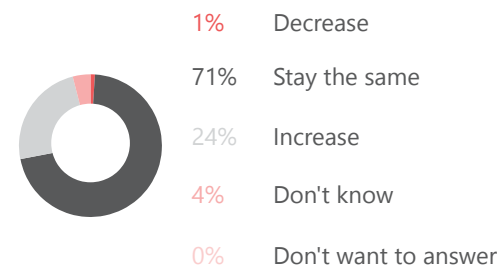
6. In addition, 73% of the vendors answered "don't know" about consumer groups reported to have faced the most difficulty accessing places.
 7. Some of the percentages in this list do not add up to 100% either due to rounding or because there is no data for some locations.
 8. Red numbers in this table flag restocking times that exceed the time that current stocks will last, thus indicating potential shortages.

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 market place as compared to previous month:



TYPES OF PAYMENT MODALITIES AVAILABLE TO CUSTOMERS

Proportion of vendors reporting accepting different types of payment in the 30 days prior to data collection:⁵

- 1 100% Cash (ETB)
- 2 25% Mobile money
- 3 11% Money transfer

About the Ethiopia JMMI and Ethiopia CCD

The Ethiopia JMMI is a joint initiative led by REACH on behalf of the Ethiopia CCD and in close collaboration with its 14 member organisations, which include REACH in its capacity as an ACTED's initiative hosted by ACTED in country.

The Ethiopia CCD was mandated in 2018 with funding from the European Commission's Humanitarian Aid Office (ECHO) to form a consortium testing an operational model to improve the efficiency and quality of CVA in Ethiopia through close, ongoing collaboration and harmonisation among cash actors.

In 2021, with funding from the European Union, the Ethiopia JMMI has been relaunched and consolidated in order to improve access to timely and accurate regional and nationwide data to inform the Ethiopia Cash response, through providing evolutions in prices, market functionality and supply chains.

Data collection for the Ethiopia JMMI is a joint exercise led by REACH on behalf of Ethiopia CCD and in close collaboration with its members, who collect data from their respective areas of operation on a voluntary basis. To ensure activities are implemented with full consultation and buy-in and are to the benefit of CCD members, a JMMI Taskforce was formed in 2020 to serve as the decision-making body guiding the initiative. The taskforce counts all partner organisations contributing to the initiative as members.

The JMMI Taskforce has agreed to adopt a common approach toward the key pillars of the initiative, such as methodology, data collection tools, item list, coverage, visibility, and ownership of data. The objectives of the Taskforce are to support the design and successful implementation of the JMMI and any further JMMI projects launched in Ethiopia, to develop an evidence base for the wider use of CVA, and to facilitate discussions of changes in critical market dynamics, which are an integral part of cash feasibility considerations.

Challenges & Limitations

- South west and Tigray regions were not assessed due to access constraints and no presence of data collection partners.
- In October 2023, onset prices were not collected in SNNP and the number of covered marketplaces are decreased in Amhara region, which can be one factor for the monthly price change reported in Table 2.
- The JMMI methodology specifies that three prices are collected per commodity, per woreda. For this round of data collection, there were less than three prices collected per commodity, per woreda for some commodities.*
- All findings are indicative and not statistically generalisable at any level.

*For this reason less than 3 prices were collected for specific items: Dire Dawa-green leafy vegetables; Somali-green leafy vegetables; SNNP-onset; and Harari-green leafy vegetables.

9. These JMMI partners participated in the September 2023 round of data collection.

JMMI Partners

- ACF - Action contre la Faim⁹
- ACTED - Agency for Technical Cooperation and Development⁹
- CARE⁹
- Concern Worldwide⁹
- CRS - Catholic Relief Services
- DCA - DanChurchAid⁹
- DRC - Danish Refugee Council⁹
- GOALS
- IRC - International Rescue Committee⁹
- Mercy Corps⁹
- NRC - Norwegian Refugee Council⁹
- Oxfam⁹
- SCI - Save the Childrens⁹
- WVI - World Vision International⁹

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 market place(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 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 2 and 11 October 2023. In October, 12 out of 14 of the JMMI partners conducted a total of 598 KIIs. This round covered 129 market places, which were sampled by partners nationwide based on their access and existing areas of intervention. This includes 5 in 68 out of 1040 woredas in Ethiopia. However, the conflict in Amhara region contributed to the reduced number of covered marketplaces since the highest amount of data was collected in this region before the conflict began.

About REACH

REACH is a joint initiative that 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. By doing so, REACH contributes to ensuring that communities affected by emergencies receive the support they need. All REACH activities are conducted in support to and within the framework of inter-agency aid coordination mechanisms.

For more information, please visit our website at www.reach-initiative.org or follow us on Twitter at @REACH_info.



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