Ethiopia | Joint Market Monitoring Initiative (JMMI)

MARKET OVERVIEW

4 - 14 February 2025

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 February round was collected using key informant interviews (KIIs) conducted in woreda capitals between 4 - 14 February 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

12,870.00 ETB

102.43 USD[1]

▲ ETB 278 2%

Median Cost of JMMI Food Basket

12,285.00 ETB

97.77 USD[1]

▲ ETB 309 3%

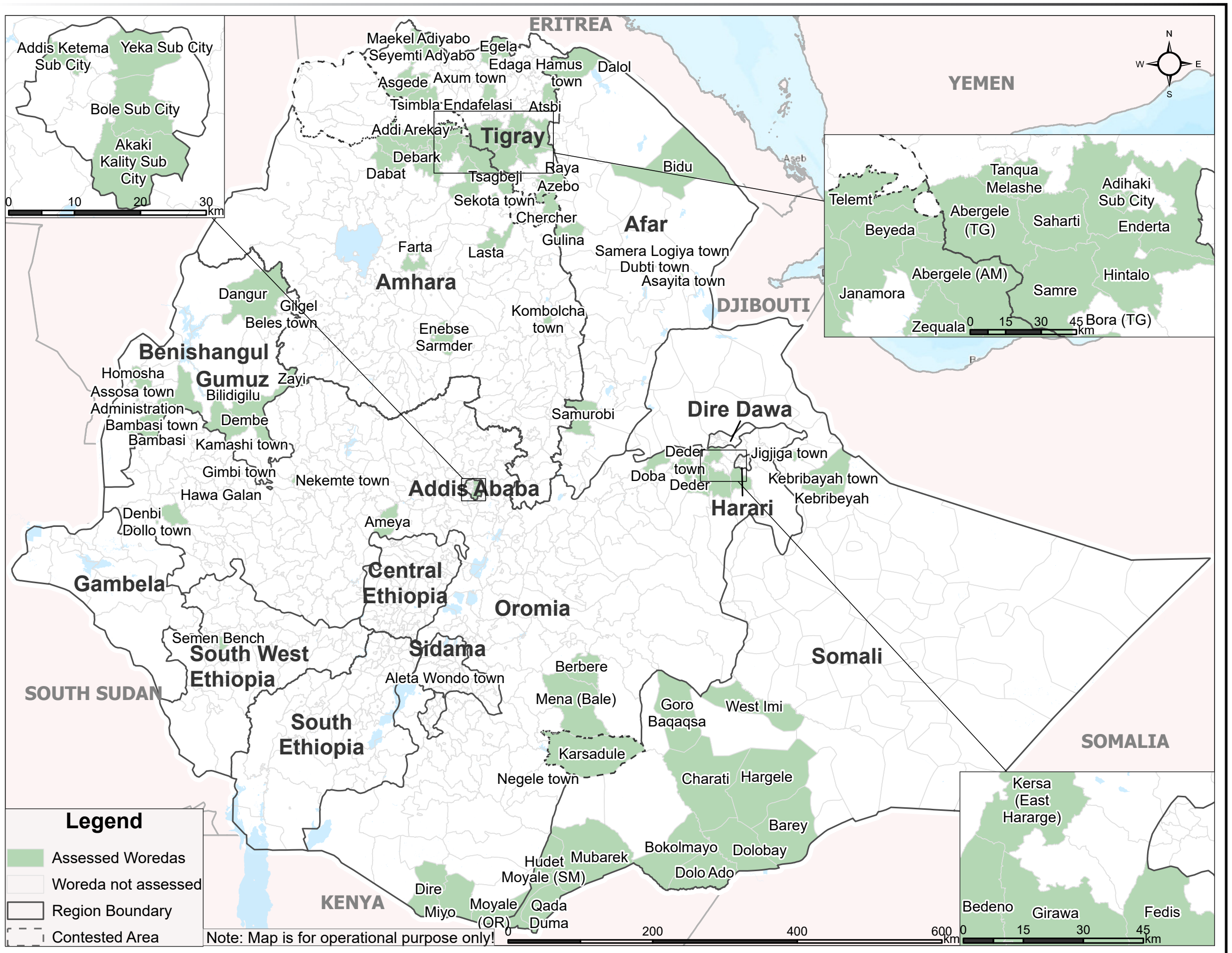
Median Cost of NFI Basket

585.00 ETB

4.65 USD[1]

▼ ETB 223 4%

Map 1: Assessed Marketplaces, By Woreda



Key Messages

- In February 2025, the prices of the full median basket (2%) and the food median basket (3%) increased compared to January 2025. However, the median cost of the NFI basket declined by 4 % in comparison to January.
- Individual commodities experienced significant price increases in February 2025 compared to January 2025, with washing basins, lentils, faba beans, onions, sanitary pads, and barley saw rises of 25%, 21%, 20%, 20%, 17%, and 16%, respectively. These increases could be attributed to supply chain disruptions caused by conflicts in Amhara, Oromia, and other parts of the country. Additionally, upward changes in the exchange rate may have further contributed to these price changes.
- In February 2025, 47% of assessed markets were reported to have limited functionality, while the remaining 52% experienced poor functionality. This represents a slight change compared to January 2025, when 61% of markets had poor functionality and 39% 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.

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Market Functionality Score (MFS)

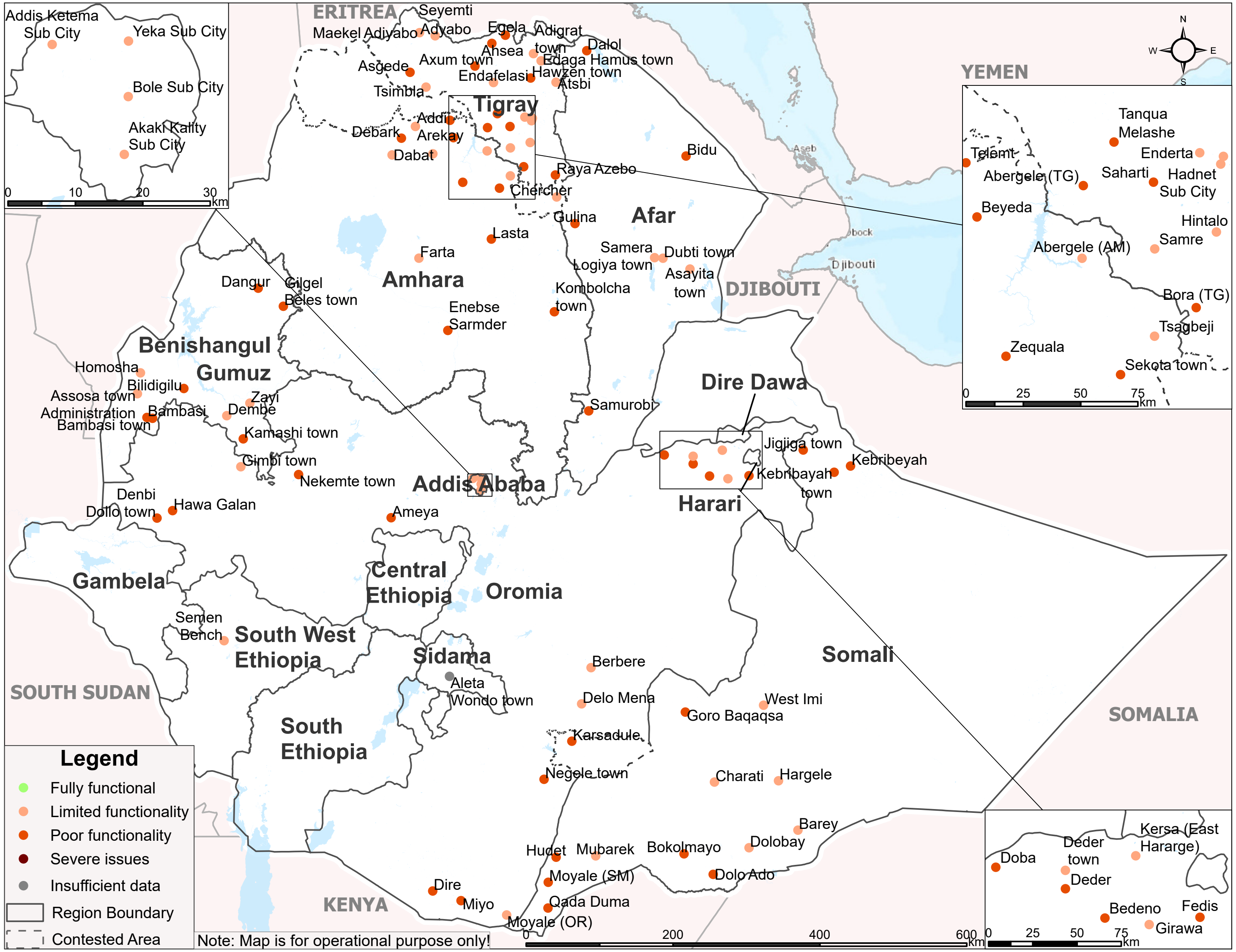
The Market Functionality Score (MFS) is a method of classifying markets based on their level of functionality, helping aid actors understand which markets function well enough to support cash and voucher assistance (CVA) and which may require alternative interventions. The MFS is divided into five dimensions:

- **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

- In February 2025, 47% of assessed markets were reported to have limited functionality, while the remaining 52% experienced poor functionality. This represents a slight change compared to January 2025, when 61% of markets had poor functionality and 39% had limited functionality.

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



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JMMI Basket

The JMMI 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 JMMI 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 2020[2], 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 rate[3]

126.17 ETB

Food basket composition according to regional consumption patterns:

Beef	Addis Ababa, Amhara, Benishangul Gumuz, Gambela, Oromia, South Ethiopia, Harari, Dire Dawa, Sidama, SWE[4]
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: JMMI Full Basket Median Price Per Region

Region	Full basket median price in Feb (ETB)	Full basket median price in Feb (USD)	Full basket median price in Jan (ETB)	Full basket median price in Jan (USD)	Change since Jan 2025(ETB)
Addis Ababa	12,267.5	97.63	12,450.5	99.09	▼ 1%
Afar	17,284	137.55	17,816.5	141.79	▼ 3%
Amhara	9,737	77.49	10,193	81.12	▼ 4%
Benishangul Gumuz	10,379	82.60	10,028.75	79.81	▲ 3%
Dire Dawa	NA	NA	10,576	84.17	N/A
Gambela	NA	NA	13,191	104.98	N/A
Harari	NA	NA	10,898	86.73	N/A
Oromia	11,054	87.97	10,730.25	85.40	▲ 3%
Sidama	14,274	113.60	13,422	106.82	▲ 6%
South Ethiopia	NA	NA	NA	NA	N/A
Somali	18,932.5	150.67	17,883.5	142.32	▲ 6%
SWE	13,926	110.83	13,600	108.23	▲ 2%
Tigray	10,835.5	86.23	10,584.5	84.24	▲ 2%

National JMMI full basket*	12,870 ETB	102.43 USD[1]	▲ ETB 277	2%
National JMMI food basket*	12,285 ETB	97.77 USD[1]	▲ ETB 300.	3%

Accepted Payment Modalities

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

1. 98% Cash (ETB)
2. 32% Mobile money
3. 26% Mobile transfer

Key Findings

- In February 2025, the national full basket cost showed a 2% increase, while the food basket cost increased by 3% compared to January 2025.
- However, 6 of the 9 assessed regions experienced price increases, with the regional JMMI full basket median prices showing slight increments, ranging between 3% and 6% since January 2025.
- Compared to the price in February 2024, the national JMMI full basket median price increased by 14%.

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

* National JMMI full and food basket prices in January were ETB 12,592.56 and ETB 11,985.06 respectively. The changes in Table 1 represent the difference between January and February 2025 prices.

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Map 3: Cost of JMMI Full Basket, By Woreda

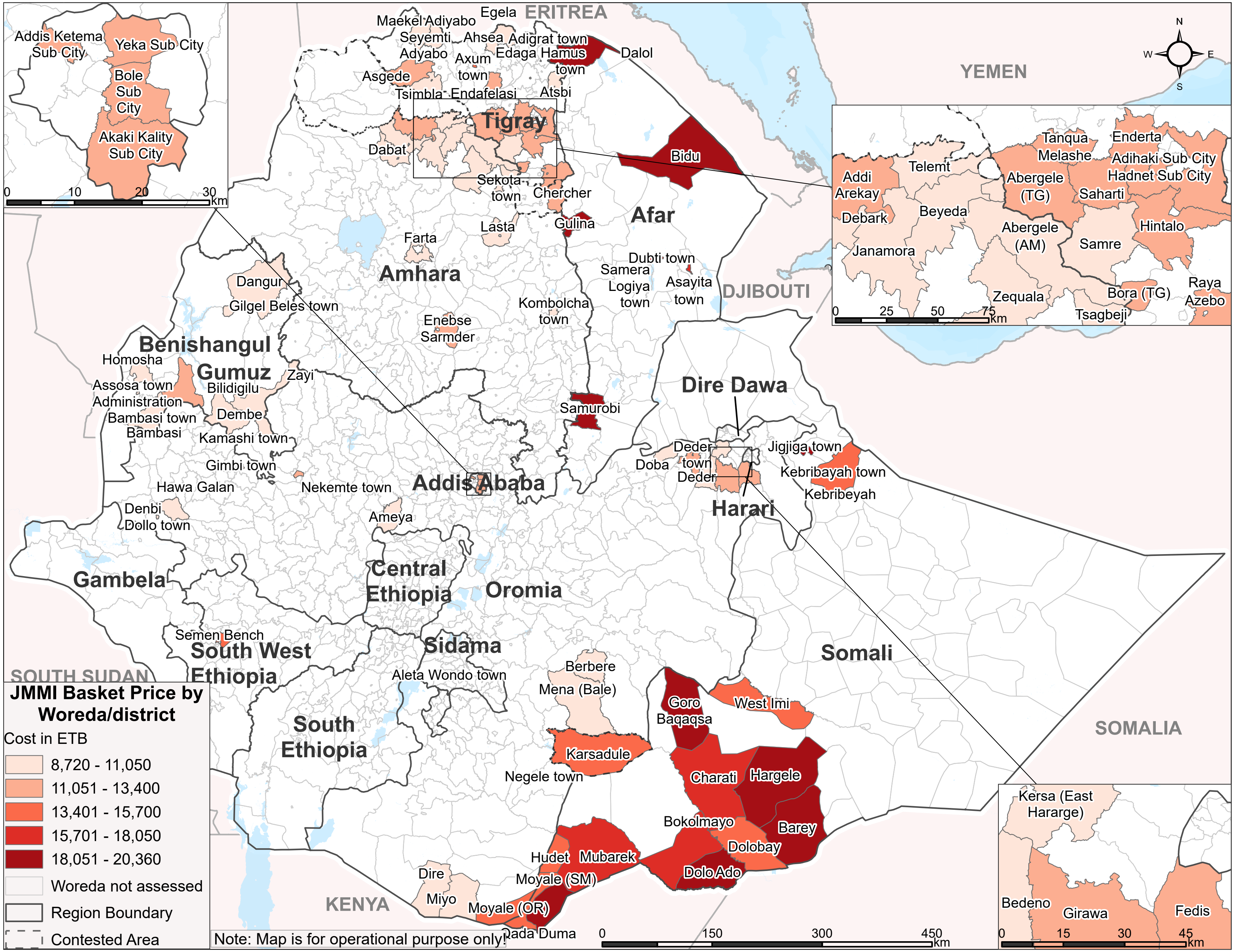

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Table 2: National and Regional Median Prices Per Item[6]

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 February, wheat (11%) and barley (16%) experienced increases, despite stability in the prices of other cereals since January 2025.
- Pulse prices showed an increase from January to February 2025, with lentils, faba beans, and garden peas rising by 21%, 20%, and 10%, respectively.
- In February 2025, a decline was reported in the prices of green leafy vegetables (-9%) and onions (-20%) compared to January 2025.
- Prices of bath soap (+4%), laundry soap (+13%), sanitary pads (+17%), and water purification (+9%) saw rise between January 2025 and February 2025.
- Cooking oil prices saw a 3% increase in February 2025 compared to January 2025.

Item[7]	National change since Jan 2025	National	Addis Ababa	Afar	Amhara	Benishangul Gumuz	Dire Dawa	Gambela	Harari	Oromia	Sidama	South Ethiopia	Somali	SWE	Tigray
Cereals[8]															
Maize	0%	40	72.5	40	36	32.5	NA	NA	NA	38	40	NA	35	115	40
Sorghum	0%	60	77.5	55	45	35	NA	NA	NA	51.25			22	135	60
Teff	▲ 4%	125	147.5	120	102.5	130	NA	NA	NA	130	120	NA	130		125
Wheat	▲ 11%	77.5	90	90	70	72.5	NA	NA	NA	62.5			120	95	65
Barley	▲ 16%	100		100							90	NA			
Enset	0%	150									100	NA			
Rice	▲ 2%	132.5		145									150	125	
Pulses															
Garden peas	▲ 10%	132	147.5	NA	120	155	NA	NA	NA	120	NA	NA	90	NA	132
Faba beans	▲ 20%	132.5	130	NA	130	142.5	NA	NA	NA	150	NA	NA	90	NA	136.25
Lentils	▲ 21%	220	247.5	NA	205	250	NA	NA	NA	195	NA	NA	150	NA	220
Meat and Fish															
Beef[8]	0%	800	650		775	650	NA	NA	NA	975	700	NA	800		800
Goat meat[8]	▲ 13%	1000		700										1150	
Camel meat[8]	0%	800		750											
Dry fish	NA	NA						NA							
Vegetables															
Green leafy[8]	▼ 9%	50	45	90	35	55	NA	NA	NA	35	NA	NA	100	92.5	56.25
Tomatoes[8]	▼ 4%	57.5	57.5	70	47.5	70	NA	NA	NA	75	60	NA	70	NA	43.75
Onions[8]	▼ 20%	80	95	70	70	110	NA	NA	NA	80	70	NA	100	130	70
Potatoes[8]	0%	50	40	50	50	57.5	NA	NA	NA	50	30	NA	40	72.5	60
Okra								NA							
WASH															
Bath soap[8]	▲ 4%	65	70	40	55	65	NA	NA	NA	50	NA	NA	50	120	62.5
Laundry soap[8]	▲ 13%	68	115	55	60	55	NA	NA	NA	68	NA	NA	60	70	72.5
Sanitary pads	▲ 17%	70	70	65	45	62.5	NA	NA	NA	70	NA	NA	60	125	80
Water purification	▲ 9%	30	75	NA	NA	NA	NA	NA	NA	NA	NA	NA	120	20	30
Shelter NFIs															
Plastic bucket	▲ 2%	235	200	NA	290	175	NA	NA	NA	300	NA	NA	150	450	220
Washing basin	▲ 25%	250	377.5	250	300	200	NA	NA	NA	350	NA	NA	120	500	220
Education NFIs															
Exercise book	0%	50	68.75	NA	45	50	NA	NA	NA	60	NA	NA	40	60	50
Pen/pencil	0%	20		NA	25	25	NA	NA	NA	30	NA	NA	30	22.5	17
Rubbers	▼ 20%	12	8.25	NA	15	10	NA	NA	NA	20	NA	NA	15	10	13.5
Rulers	0%	30	17.5	NA	50	30	NA	NA	NA	20	NA	NA	15	30	35
Other															
Cooking oil[8]	▲ 3%	285	285	NA	260	272.5	NA	NA	NA	290	NA	NA	250	300	295
Milk	0%	100	110	90	80	120	NA	NA	NA	100	NA	NA	120	120	95

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 February 2025, data was not collected in Dire Dawa, Gambela, Harari and South Ethiopia due to unavailability of data collection partners. Additionally, prices of pulses, WASH, SNFIs, and educational items were not collected in Sidama, SWE and Afar, which could have likely affected the monthly price changes in Table 1 and Table 2.

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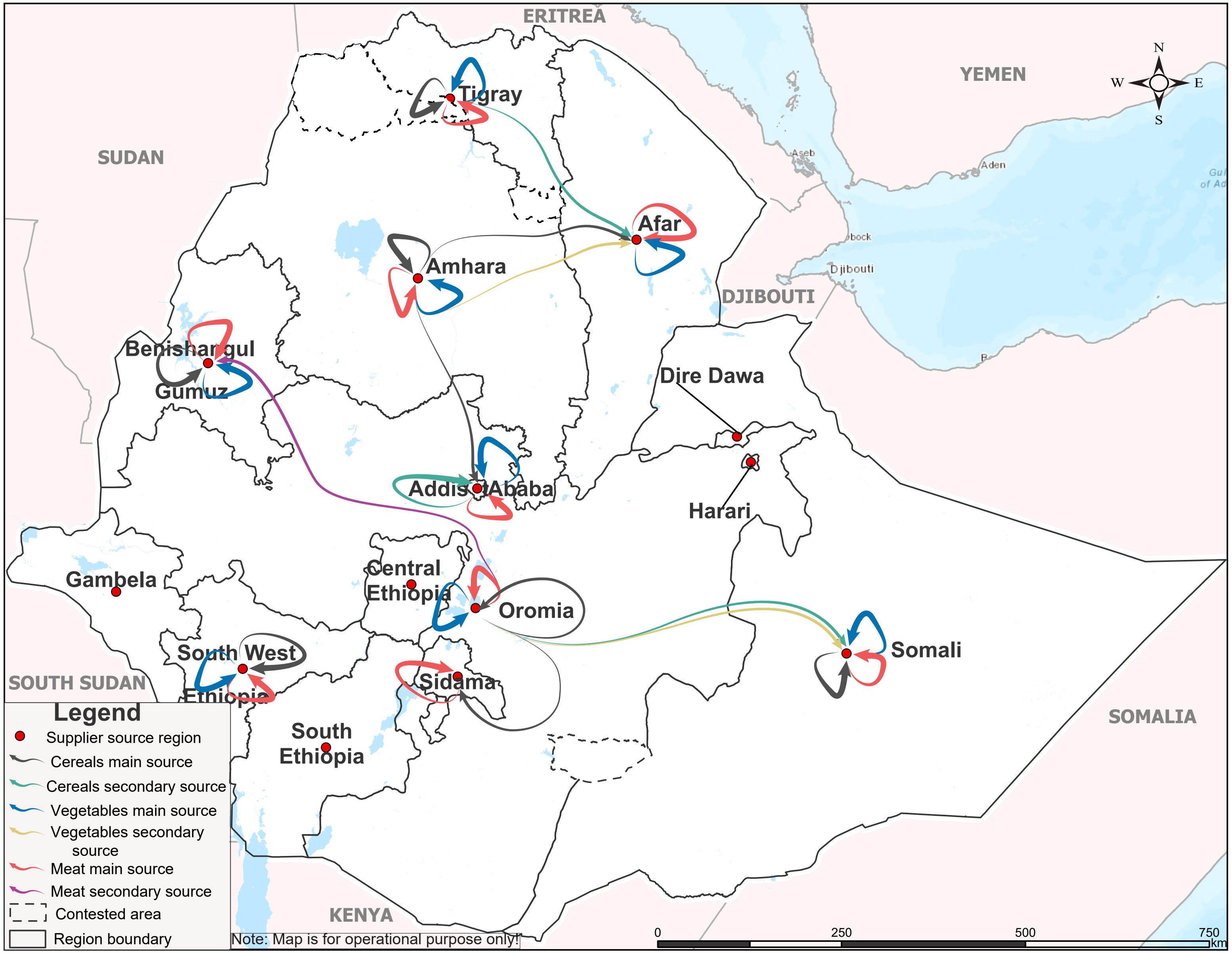
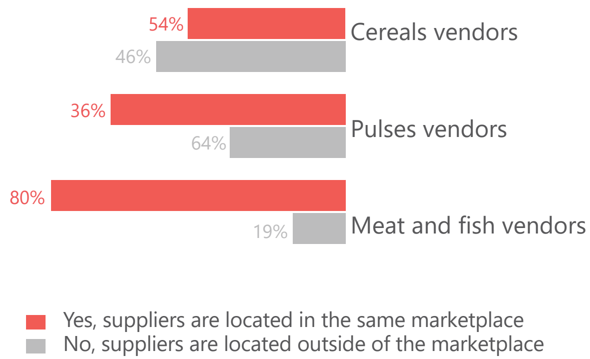
SUPPLY CHAIN AND MARKET ACCESSIBILITY

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 February, 20% of assessed cereal vendors in Benishangul-Gumuz reported that their main suppliers were located in Oromia. Among assessed pulse vendors in Addis Ababa, 29% reported sourcing from Amhara, while another 29% sourced from Oromia. Additionally, in February 2025, 53% of assessed meat vendors in Addis Ababa reported sourcing meat from Amhara.

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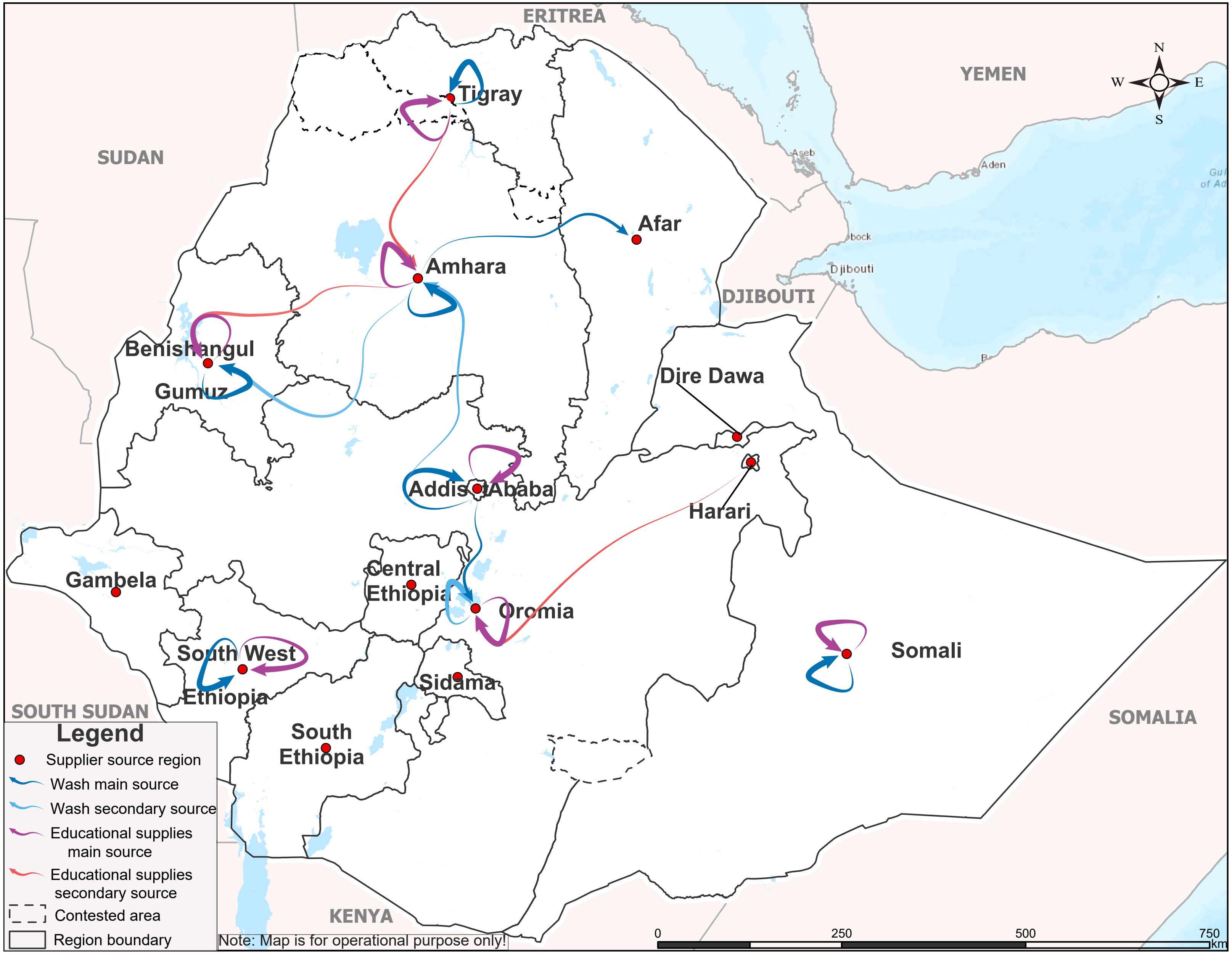
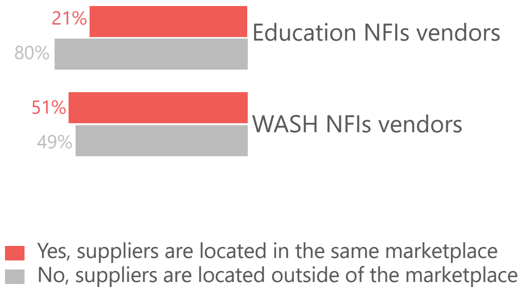
Map 5: NFI Supply Route



LOCATION OF MAIN SUPPLIERS FOR NON-FOOD ITEMS

Location of main suppliers of NFIs, by vendor type:



Key Findings

- In February 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 February 2025, 31%, 24%, and 11% of the assessed WASH NFI vendors in 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 Somali (42%) reported that their suppliers were located in Oromia.

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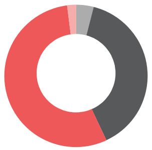
VENDOR AND CUSTOMER DYNAMICS, PREDICTED PRICE CHANGES AND MARKET ACCESS

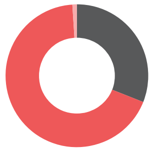
REPORTED PREDICTED CHANGE IN PRICE OF FOOD AND NON-FOOD ITEMS

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



4%	Decrease
39%	Stay the same
55%	Increase
2%	Don't know

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



0%	Decrease
31%	Stay the same
68%	Increase
1%	Don't know

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

1. 100% Rising exchange rate
2. 75% Customers running out of these items
3. 50% Vendors cannot obtain these items

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

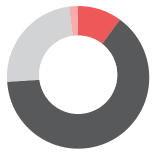
1. 100% Rising exchange rate
2. 50% Demand will incrwase because humanitarian distribution will stop
3. 50% Unstable market

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:

21%	Decrease
52%	Stay the same
24%	Increase
3%	Don't know

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



10%	Decrease
64%	Stay the same
24%	Increase
2%	Don't know

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. 55% Women
2. 51% Children
3. 40% 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 collection[10]:

1. 12% Fear of violence
2. 10% Fear of robbery
3. 9% Fear of looting
4. 7% Curfew

DIFFICULTIES IN MEETING DEMAND AND TRANSPORTING OR PROCURING

26% (n=33) 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]:

- Not enough money (52%)
- Not enough credit (39%)
- Domestic transport restrictions (28%)

14% (n=14) 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]:

- Not enough money (40%)
- Not enough credit (35%)
- Domestic transport restrictions (30%)

25% (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 were[10]:

- Producers producing less (56%)
- Not enough money (42%)
- Not enough credit (31%)

17% (n=4) 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]:

- Not enough money (84%)
- Not enough credit (44%)
- Producers producing less (24%)

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 February 2025[11]

Item	Availability			Stock and Restock	
	Available (% KIs)	Limited Available	Not available	Days stock available	Days needed to restock
Cereals					
Maize	67%	30%	0%	15	4
Sorghum	53%	34%	7%	10	3
Teff	55%	34%	5%	15	5
Wheat	44%	36%	13%	10	5
Barley	69%	23%	0%	20	3
Enset	57%	29%	0%	1	1
Rice	88%	12%	0%	18	5
Pulses					
Garden peas	69%	30%	0%	8	2
Faba beans	66%	29%	0%	12	5
Lentils	61%	34%	4%	15	3
Meat and Fish					
Beef	80%	20%	0%	2	2
Goat meat	93%	7%	0%	1	1
Camel meat	60%	30%	10%	1	1
Dry fish	NA	NA	NA	NA	NA
Vegetables					
Green leafy	53%	23%	16%	2	2
Tomatoes	75%	24%	0%	4	2
Onions	77%	22%	0%	5	2
Potatoes	68%	29%	0%	6	3
Okra	NA	NA	NA	NA	NA
WASH					
Bath soap	80%	19%	1%	27	3
Laundry soap	81%	18%	1%	20	3
Sanitary pads	62%	21%	14%	25	3
Water purification	52%	33%	0%	30	2
Shelter					
Plastic bucket	76%	23%	1%	23	3
Washing basin	65%	23%	11%	21	5
Education					
Exercise book	81%	19%	0%	30	3
Pen/pencil	83%	15%	1%	30	4
Rubber	48%	22%	0%	30	2
Ruler	51%	21%	0%	30	2
Other					
Cooking oil	75%	25%	0%	15	3
Milk	81%	19%	0%	1	1
Egg	85%	15%	0%	6	2
Salt	81%	15%	3%	25	2

Key Findings

- In February 2024, 93% of interviewed vendors reported goat meat availability, 88% reported rice availability, and 81% reported laundry soap availability.
- The highest rates of limited availability are reported for wheat (36%), sorghum (34%), teff (34%), lentils (34%), water purification (33%), garden peas (30%), maize (30%), potatoes (29%), and cooking oil (25%) in February 2025.
- Green leafy vegetables (16%), sanitary pads (14%), wheat (13%), and washing basins (11%) experienced the highest unavailability in February 2025.

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

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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 4-14 February 2025 . In February 2025, 27 of the Ethiopia Cash Working Group (CWG) JMMI partners conducted a total of 705KIIs. This round covered 221 marketplaces, which were sampled by partners nationwide based on their access and existing areas of intervention. This round includes 94 out of 1142 woredas in Ethiopia.

Challenges and limitations

- The Central Ethiopia, Gambela, Diredawa, Harari and South Ethiopia regions were not assessed due to the unavailability of data collection partners.
- In February 2025, prices of pulses, WASH NFIs, shelter NFIs, education NFIs, and other items were not collected in the Sidama region, while, 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.

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
- AFD– Action for Development
- Ayuda en Acción Ethiopia
- CARE
- Caritas Switzerland
- DCA – Danish Church Aid
- EECMY DASSC
- ERCS – Ethiopian Red Cross Society
- FIDO (Fayyaa Integrated Development Organization)
- GOAL
- Helvetas
- IRC – International Rescue Committee
- LWF – Lutheran World Federation
- NRC – Norwegian Refugee Council
- Oxfam GB
- PC – Pastoralist Concern
- Plan International
- REACH
- RHSPDO – Renaissance for Health and Socioeconomic Progress Development Organization
- SCI – Save the Children
- Self Help Africa
- UNICEF
- WHH – Welthungerhilfe
- WVI – World Vision International abdiya Adow

27	Participating agencies
9	Assessed regions
94	Assessed woredas
705	Key informant interviews (KIIs)
36	Commodities assessed

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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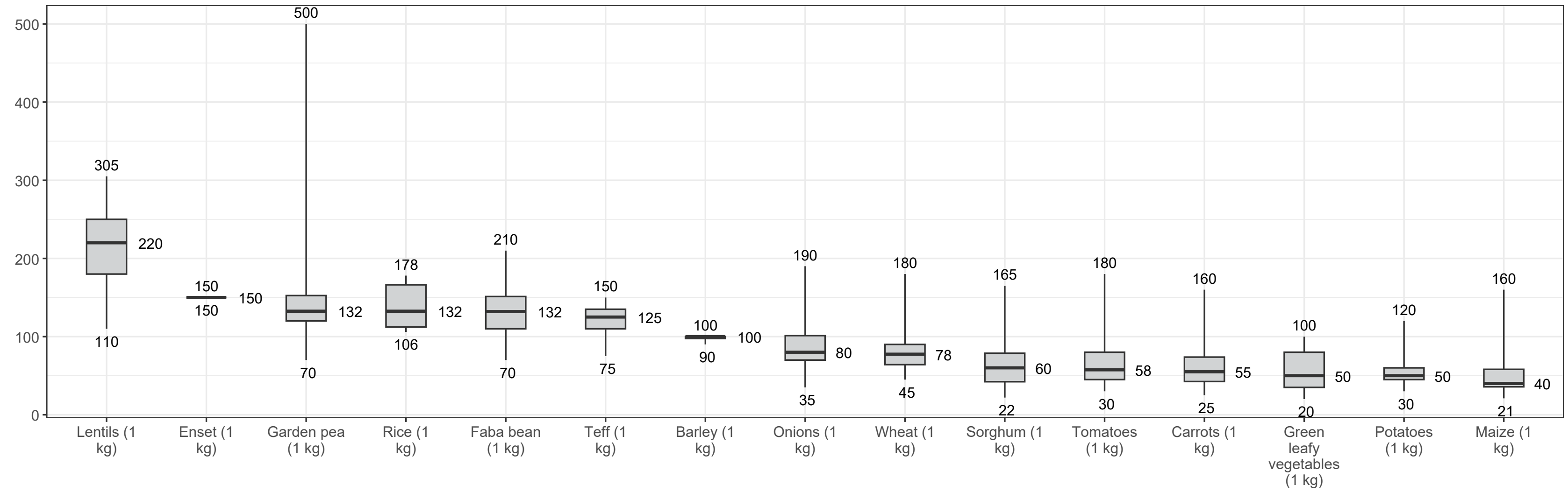
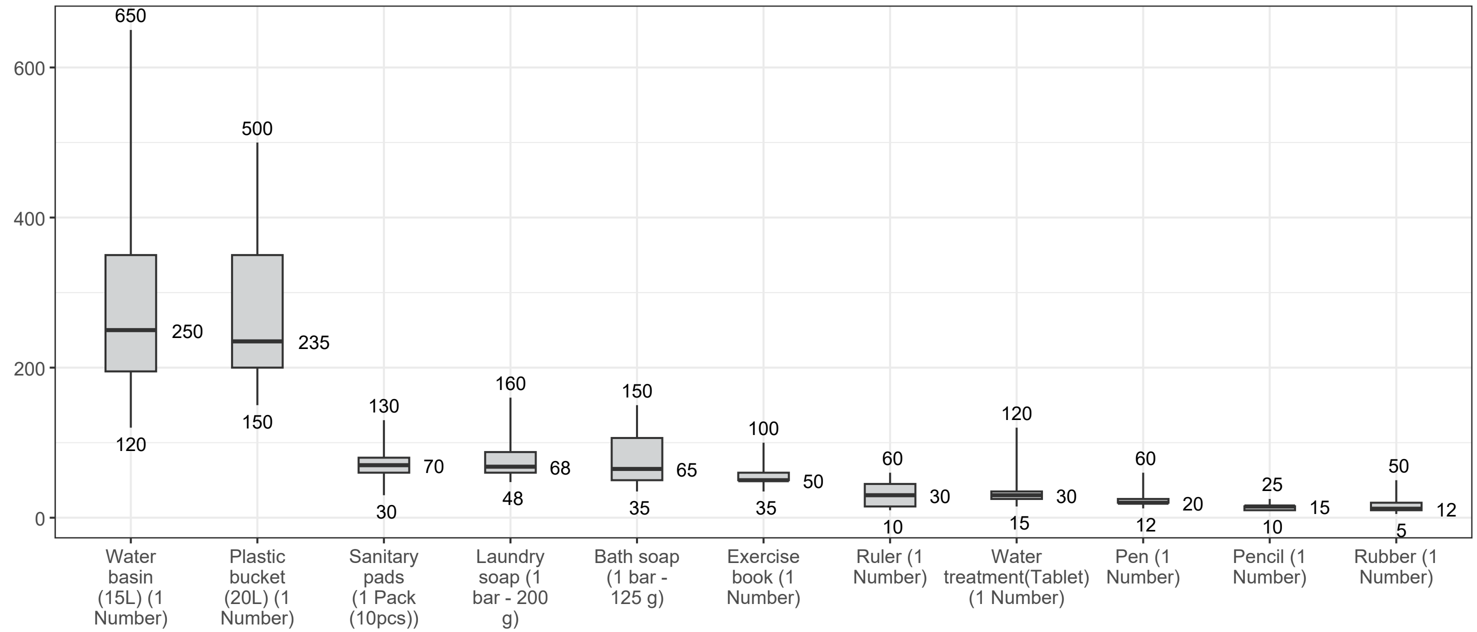
ANNEX 1: Distribution of Prices

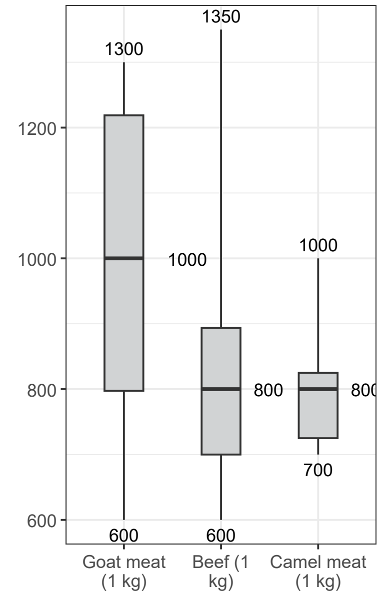
Food Items



NFIs



Meat and Fish Items



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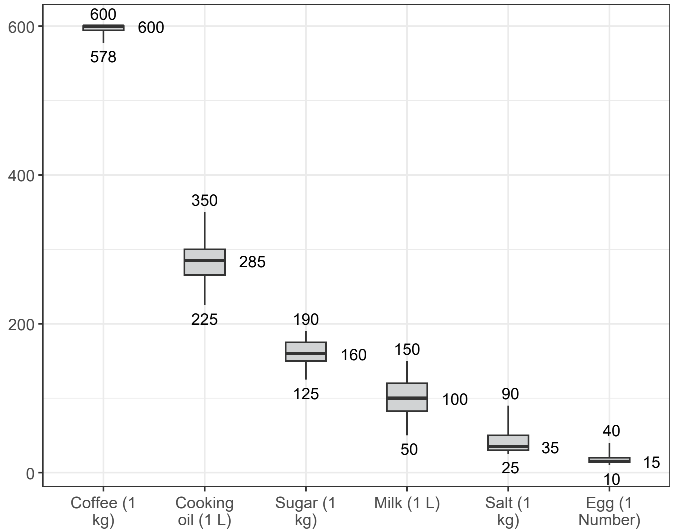
Other Food Items



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