Ethiopia | Joint Market Monitoring Initiative (JMMI)

MARKET OVERVIEW

1--13 March 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 March round was collected using key informant interviews (KIIs) conducted in woreda capitals between 1-13 March 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

13311 ETB

105.3 USD[1]

▲ ETB 441 3%

Median Cost of JMMI Food Basket

12681 ETB

100.4 USD[1]

▲ ETB 396 3%

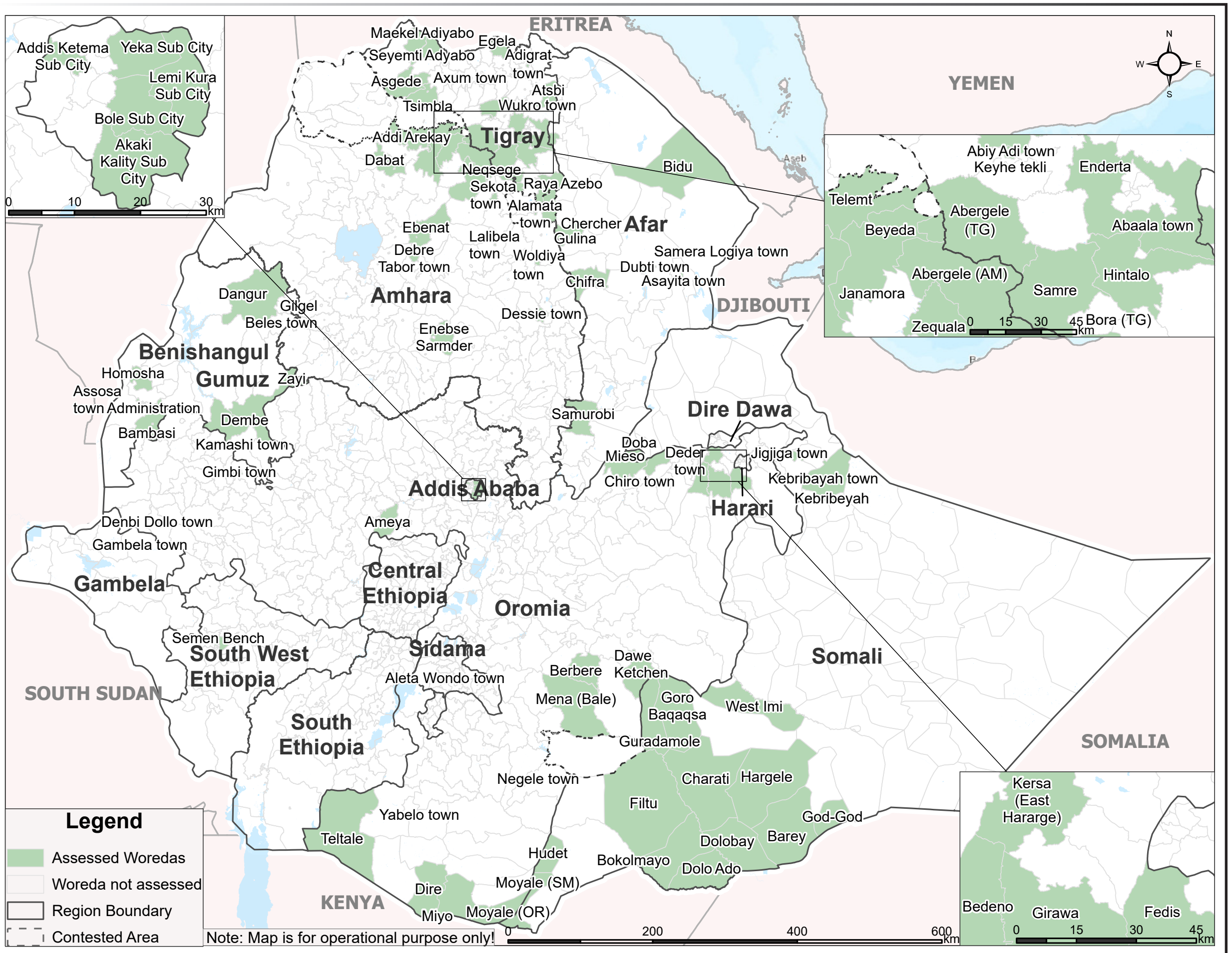
Median Cost of NFI Basket

630 ETB

5.0 USD[1]

▲ ETB 45 7%

Map 1: Assessed Marketplaces, By Woreda



Key Messages

- In March 2025, the prices of the full median basket and the food median basket both increased by 3% compared to February 2025. Additionally, the median cost of the NFI basket rose by 7% in comparison to February 2025.
- In the analysis of price changes since February 2025, several prices have changed significantly, especially those rising or falling by over 10%. Enset prices jumped by 33%, while leafy greens and rubber increased by 25%. Green peas rose by 14%, and fava beans went up by 13%. Conversely, barley fell by 10%, water containers dropped by 20%, and onions decreased by 13%. These food price changes are linked to the fasting season in Ethiopia, which has impacted prices.
- In March 2025, an assessment of the marketplaces reported that 48% exhibited limited functionality, while 50% experienced poor market performance. This shows a slight increase in limited functionality compared to February 2025, where 47% of the evaluated markets were reported to have limited functionality, and 52% faced poor performance. Both months highlighted similar challenges, primarily related to availability and resilience issues, which were likely caused by restricted access to financing and insufficient production capacity to meet demand. These ongoing market limitations could significantly impact the implementation of cash and voucher assistance (CVA).

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 March 2025, an assessment of the marketplaces reported that 48% exhibited limited functionality, while 50% experienced poor market performance. This shows a slight increase in limited functionality compared to February 2025, where 47% of the evaluated markets were reported to have limited functionality, and 52% faced poor performance.

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
		Potatoes	3 kg
		Onions	5 kg
		Egg	18 pieces
		Cooking oil	5.86 L
Meat	2.7 kg		
Green leafy vegetables	5 kg		

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]

126.37 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 Mar (ETB)	Full basket median price in Mar (USD)	Full basket median price in Feb (ETB)	Full basket median price in Feb (USD)	Change since Feb 2025(ETB)
Addis Ababa	11819	93.5	12,267.5	97.63	▼ 4%
Afar	17166	135.8	17,284	137.55	▼ 1%
Amhara	9200	72.8	9,737	77.49	▼ 6%
Benishangul Gumuz	9964	78.9	10,379	82.60	▼ 4%
Dire Dawa	NA	NA	NA	NA	NA
Gambela	12145	96.1	NA	NA	NA
Harari	NA	NA	NA	NA	NA
Oromia	10992	87.0	11,054	87.97	▼ 1%
Sidama	15238	120.6	14,274	113.60	▲ 7%
South Ethiopia	NA	NA	NA	NA	NA
Somali	18153	143.7	18,932.5	150.67	▼ 4%
SWE	14515	114.9	13,926	110.83	▲ 4%
Tigray	11481	90.9	10,835.5	86.23	▲ 6%
National JMMI full basket[5]	13311 ETB	105.3 USD[1]	▲ ETB 441		3%
National JMMI food basket[5]	12681 ETB	100.4 USD[1]	▲ ETB 396		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. 35% Mobile transfer
3. 32% Mobile money

Key Findings

- In March 2025, the national full basket cost showed a 3% increase, while the food basket cost increased by 3% compared to February 2025.
- However, 3 of the 10 assessed regions experienced price increases, with the regional JMMI full basket median prices showing slight increments, ranging between 4% and 7 % since February 2025.
- Compared to the price in March 2024, the national JMMI full basket median price increased by 16 %.

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

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

[4] South West Ethiopia.

[5] National JMMI full and food basket prices in March were 13,311ETB and 12681ETB respectively. The changes in Table 1 represent the difference between February and March 2025 prices.

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Map 3: Cost of JMMI Full Basket, By Woreda

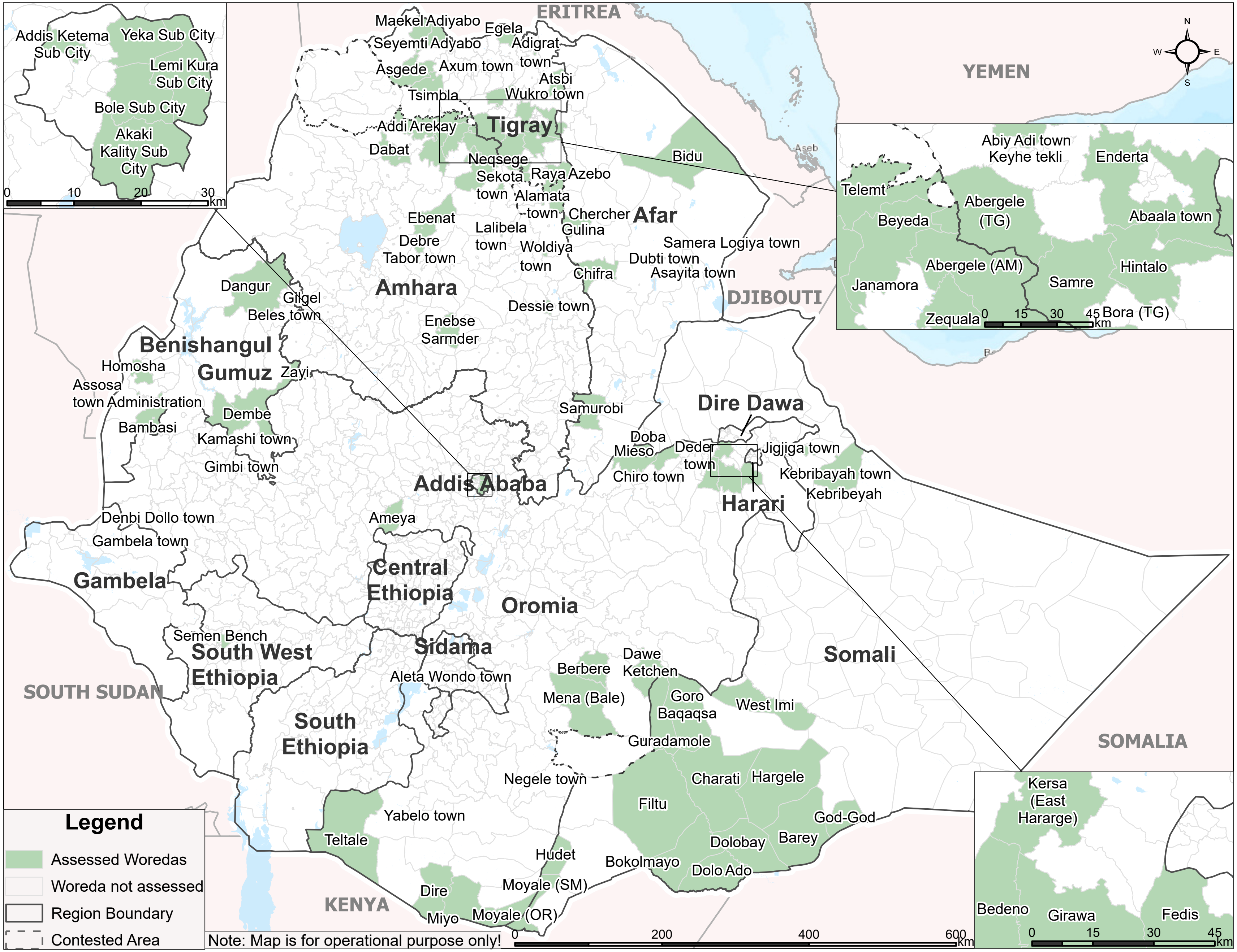

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Table 2: National and Regional Median Prices Per Item[6]

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 March 2025, sorghum decreased by 8%, teff by 4%, wheat by 3%, barley by 10%, enset increased by 33%, and rice by 5% compared to February 2025.
- In March 2025, green pea prices increased by 14%, fava bean prices increased by 13%, and lentil prices increased by 8%.
- In March 2025, leafy green prices increased by 25%, tomato prices decreased by 4%, onion prices decreased by 13%, and potato prices increased by 10%.
- In March 2025, soap prices increased by 8%, laundry soap prices decreased by 2%, sanitary pad prices decreased by 7%.
- Cooking oil prices saw a 5% increase in March 2025 compared to February 2025.

Item[7]	National change since Feb 2025	National	Addis Ababa	Afar	Amhara	Benishangul Gumuz	Dire Dawa[9]	Gambela	Harari[9]	Oromia	Sidama	South Ethiopia[9]	Somali	SWE	Tigray
Cereals[8]															
Maize	0%	40	55	43	35	28	NA	35	NA	38	40	NA	100	35	40
Sorghum	▼ 8%	55	80	55	43	38	NA	35	NA	49	NA		130	60	65
Teff	▼ 4%	120	130	124	100	126	NA	123	NA	113	120	NA	NA	135	130
Wheat	▼ 3%	75	75	60	60	66	NA	100	NA	65	90		100	60	75
Barley	▼ 10%	90		100							80	NA			
Enset	▲ 33%	200									NA	NA		200	
Rice	▲ 5%	139		139							NA		138		
Pulses															
Garden peas	▲ 14%	150	160	NA	125	145	NA	145	NA	85		NA	NA	80	159
Faba beans	▲ 13%	150	157	NA	120	185	NA	150	NA	130	105	NA	NA	80	150
Lentils	▲ 8%	238	225	NA	200	280	NA	280	NA	260		NA		120	250
Meat and Fish															
Beef[8]	0%	800	750		650	580	NA	1000	NA	963	850	NA		800	800
Goat meat[8]	▼ 5%	950		850									950		
Camel meat[8]	0%	800		800									800		
Dry fish	NA	400						400							
Vegetables															
Green leafy[8]	▲ 25%	63	45	85	45	50	NA	70	NA	50	NA	NA	135	45	80
Tomatoes[8]	▼ 4%	55	60	45	50	60	NA	80	NA	68	40	NA	120	80	43
Onions[8]	▼ 13%	70	55	80	50	60	NA	80	NA	70	50	NA	120	90	65
Potatoes[8]	▲ 10%	55	40	50	50	50	NA	50	NA	50	40	NA	80	40	60
Okra	NA	100						100							
WASH															
Bath soap[8]	▲ 8%	70	100	38	45	70	NA	100	NA	74	NA	NA	110	50	70
Laundry soap[8]	▼ 2%	67	70	55	65	50	NA	70	NA	98	NA	NA	60	60	70
Sanitary pads	▼ 7%	65	65	60	60	70	NA	50	NA	70	NA	NA	100	60	80
Water purification	0%	30	40	230	NA	NA	NA	50	NA	NA	NA	NA	NA	NA	30
Shelter NFIs															
Plastic bucket	▼ 6%	220	185	215	300	400	NA	200	NA	320	NA	NA	425	150	220
Washing basin	▼ 20%	200	190	170	185	NA	NA	75	NA	408	NA	NA	500	120	200
Education NFIs															
Exercise book	0%	50	40	70	45	50	NA	70	NA	55	NA	NA	55	50	53
Pen/pencil	▲ 25%	25	10	40	25	28	NA	20	NA	28	NA	NA	25	30	15
Rubbers	▲ 25%	15	10	NA	40	10	NA	15	NA	13	NA	NA	30	15	15
Rulers	▲ 33%	40	40	NA	50	35	NA	50	NA	43	NA	NA	20	20	40
Other															
Cooking oil[8]	▲ 5%	300	290	280	300	330	NA	300	NA	300	NA	NA	285	300	330
Milk	0%	100	100	100	100	125	NA	100	NA	125	NA	NA	90	100	90
Eggs[8]	0%	15	16	16	15	20	NA	20	NA	15	NA	NA	20	15	12
Salt	0%	35	25	50	40	40	NA	40	NA	50	NA	NA	75	30	30

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 March 2025, data was not collected in Dire Dawa, 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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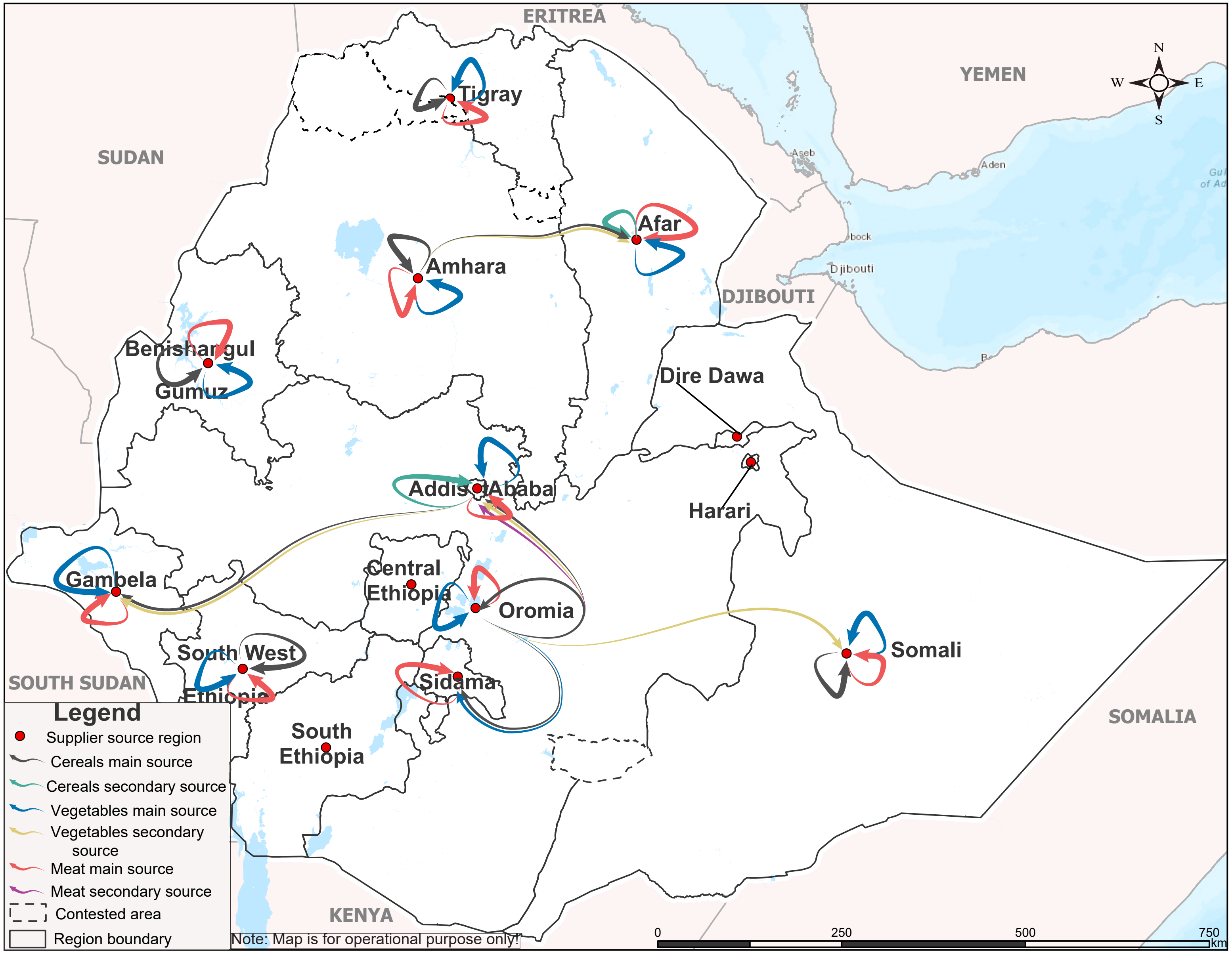
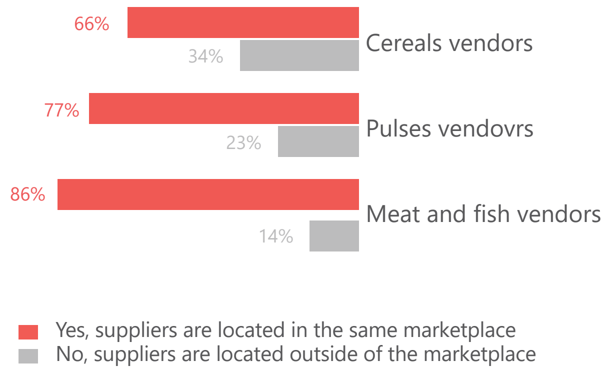
SUPPLY CHAIN AND MARKET ACCESSIBILITY

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 March, 80% of assessed cereal vendors in Afar reported that their main suppliers were located in Amhara. Among the assessed pulse vendors in Oromia, 50% reported sourcing from Addis Ababa. Additionally, 66% of vendors in Addis Ababa sourced their products from Oromia, while 20% of meat vendors in Addis Ababa indicated that they sourced from Oromia, as reported by the interviewed vendors.

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INTER-AGENCY CWG CASH WORKING GROUP Ethiopia

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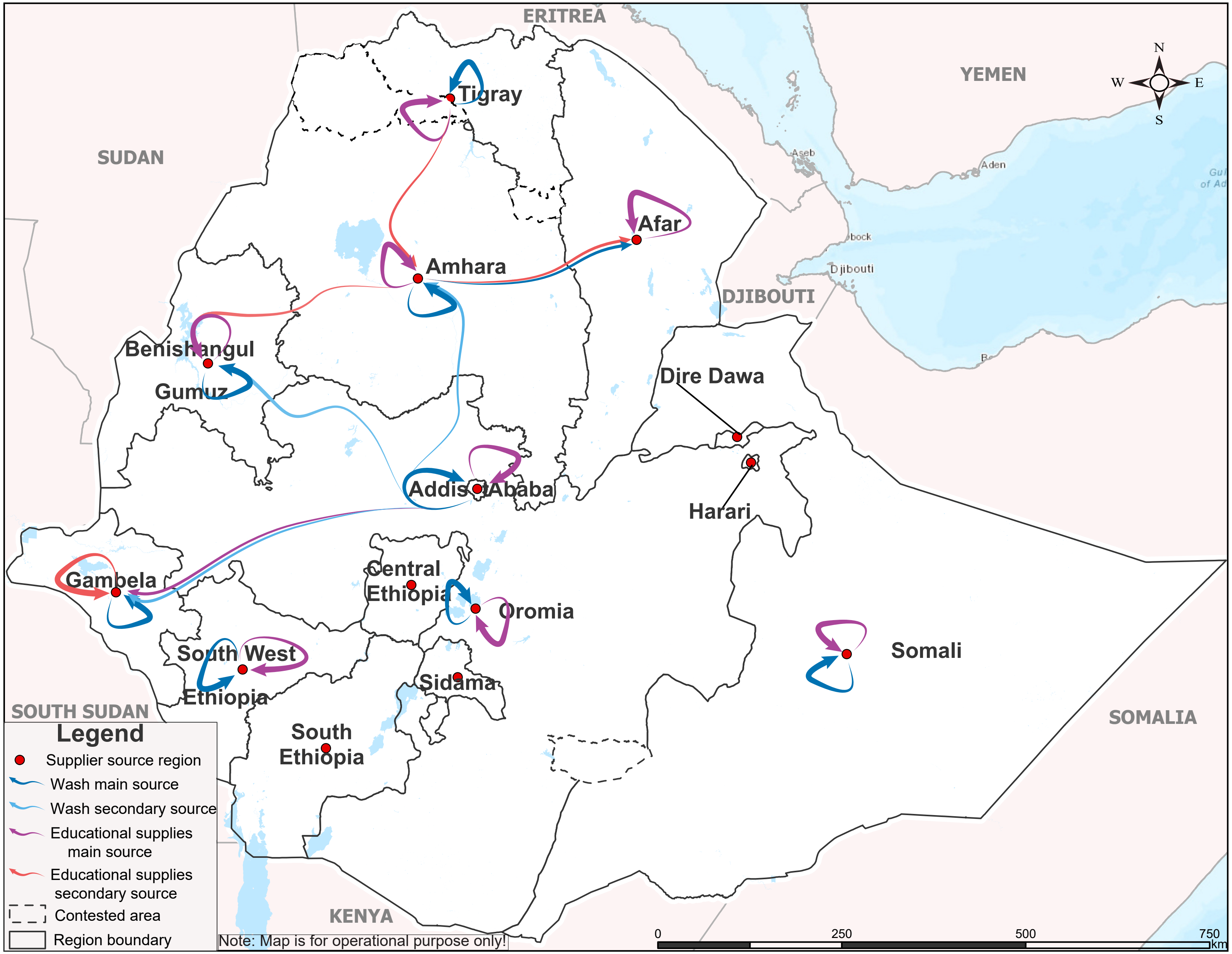
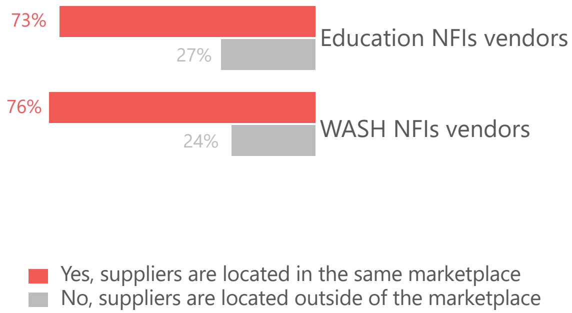


LOCATION OF MAIN SUPPLIERS FOR NON-FOOD ITEMS

Location of main suppliers of NFIs, by vendor type:



Key Findings

- In March 2025, 82% of assessed WASH NFI vendors in Afar sourced their items from the Amhara region; 14% of vendors in the Amhara region sourced from Addis Ababa; 18% of vendors in Benishangul-Gumuz sourced from Addis Ababa; and 50% of vendors in the Gambela region also sourced from Addis Ababa.
- In March 2025, 31% of Education NFI vendors in Afar sourced their items from Amhara, while 20% of vendors in Benishangul-Gumuz also sourced from Amhara. Additionally, 10% of vendors sourced from Addis Ababa, and 60% of the interviewed vendors in the Gambela region reported sourcing from Addis Ababa.

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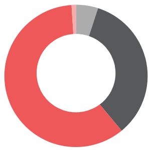
VENDOR AND CUSTOMER DYNAMICS, PREDICTED PRICE CHANGES AND MARKET ACCESS

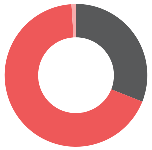
REPORTED PREDICTED CHANGE IN PRICE OF FOOD AND NON-FOOD ITEMS

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



4% Decrease
34% Stay the same
60% Increase
1% Don't know

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



3% Decrease
32% Stay the same
65% Increase

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

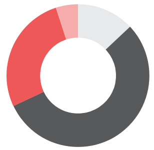
1. 62% Rising exchange rate
2. 46% Customers demanding moreof these items
3. 26% Customer running out these items

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

1. 83% Rising exchange rate
2. 29% Customer running out of these items
3. 29% Customer demanding more of these items

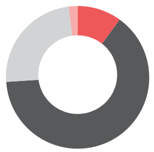
CHANGE IN NUMBER OF CUSTOMERS AND VENDORS

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



13% Decrease
55% Stay the same
27% Increase
5% Don't know

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



13% Decrease
55% Stay the
27% Increase
5% 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. 61% Children
2. 50% Women
3. 47% 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. 8% Fear of violence
2. 8% Fear of robbery
3. 7% Curfew
4. 4% Fear of looting

DIFFICULTIES IN MEETING DEMAND AND TRANSPORTING OR PROCURING

35% (n=45) 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 (28%)
- Not enough credit (28%)
- Domestic transport restrictions (40%)

17% (n=12) 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 (53%)
- Not enough credit (24%)
- Transport shortage(24%)

27% (n=25) 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 (61%)
- Transport shortage (42%)
- Not enough credit (33%)

14% (n=5) 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 57%)
- Not enough credit (47%)
- Domestic transport restriction(43%)

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 March 2025[11]

Item	Availability: Available (% KIs)	Limited Available	Not available	Stock and Restock: Days stock available	Days needed to restock
Cereals					
Maize	66%	31%	0%	15	5
Sorghum	42%	45%	8%	15	5
Teff	52%	40%	6%	15	7
Wheat	45%	36%	11%	15	6
Barley	69%	19%	6%	18	3
Enset	75%	0%	0%	1	1
Rice	85%	15%	)%	15	4
Pulses					
Garden peas	58%	36%	4%	14	7
Faba beans	64%	31%	1%	15	6
Lentils	59%	37%	4%	15	5
Meat and Fish					
Beef	54%	41%	5%	2	2
Goat meat	87%	13%	0%	1	1
Camel meat	71%	22%	4%	1	1
Dry fish	75%	25%	0%	10	3
Vegetables					
Green leafy	50%	30%	12%	2	2
Tomatoes	78%	20%	0%	4	2
Onions	74%	24%	2%	6	3
Potatoes	71%	25%	2%	5	3
Okra	17%	33%	50%	5	2
WASH					
Bath soap	79%	20%	1%	20	3
Laundry soap	81%	18%	1%	20	3
Sanitary pads	57%	25%	14%	20	3
Water purification	26%	32%	33%	27	5
Shelter					
Plastic bucket	71%	21%	6%	20	5
Washing basin	70%	25%	0%	26	4
Education					
Exercise book	77%	21%	0%	34	3
Pen/pencil	79%	20%	0%	25	4
Rubber	48%	21%	22%	33	3
Ruler	48%	18%	23%	30	3
Other					
Cooking oil	76%	23%	2%	15	4
Milk	67%	33%	0%	1	1
Egg	70%	30%	0%	5	2
Salt	70%	18%	2%	20	3

Key Findings

- Regarding the availability of items in March, 85% of rice, 87% of goat meat, and 81% of laundry soap have been reported as available by the interviewed vendors.
- The highest limited availability reported by the interviewed vendors in March is as follows: sorghum 45%, teff 40%, beef meat 41%, garden peas and wheat 36%, and lentils 37%.
- Okra (50%), water purification(33%), ruler (23%), rubber (22%) and sanitary pad (14%) experienced the highest unavailability in March 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 1-13 March 2025 . In March 2025, 30 of the Ethiopia Cash Working Group (CWG) JMMI partners conducted a total of 728 KIIs. This round covered 224 marketplaces, which were sampled by partners nationwide based on their access and existing areas of intervention. This round includes 98 out of 1142 woredas in Ethiopia.

Challenges and limitations

- The Central Ethiopia, Diredawa, Harari and South Ethiopia regions were not assessed due to the unavailability of data collection partners.
- In March 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

- REACH
- ACF (Action Against Hunger)
- NRC (Norwegian Refugee Council)
- Plan International
- DCA (DanChurchAid)
- LWF (Lutheran World Federation)
- Actionaid
- Save the Children
- Oxfam
- UNICEF
- GOAL Ethiopia
- IRC (International Rescue Committee)
- Concern
- EECMY DASSC
- Caritas Switzerland
- Gayo Pastoral Development Initiative (GPDI)
- Generation for African Relief and Development Organization
- Pastoralist Concern (PC)
- Ayuda en Acción Ethiopia
- CIFA ETS
- CARE
- Self Help Africa
- ERCS (Ethiopian Red Cross Society)
- World Vision International
- FH Ethiopia
- Welt Hunger Hilfe
- AFD(Action for Development)
- Islamic Relief Ethiopia
- Renaissance for Health and Socioeconomic Progress Development Organization
- ACTED

30	Participating agencies
10	Assessed regions
98	Assessed woredas
728	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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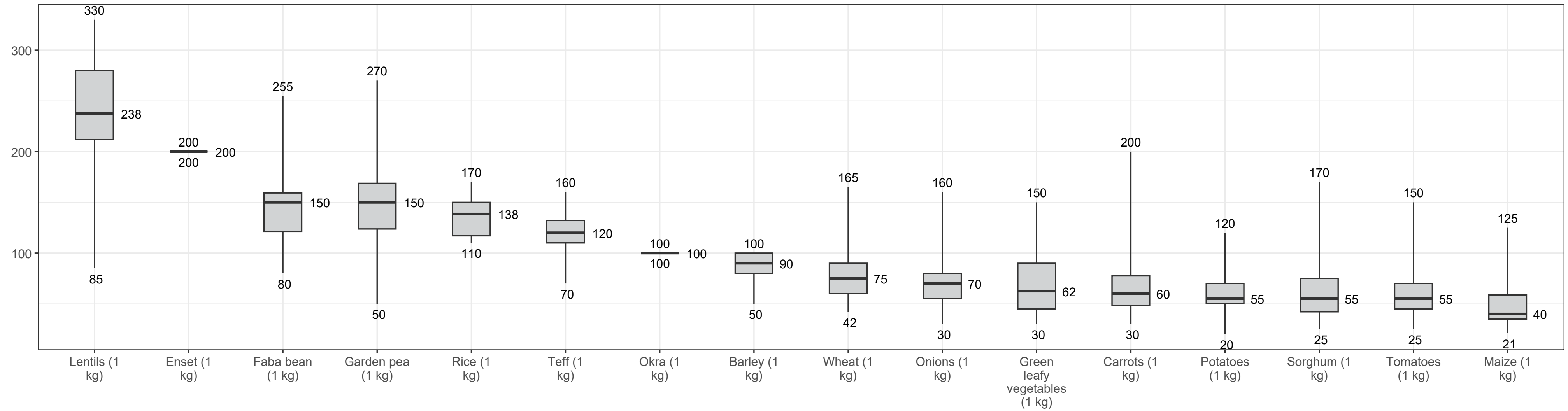
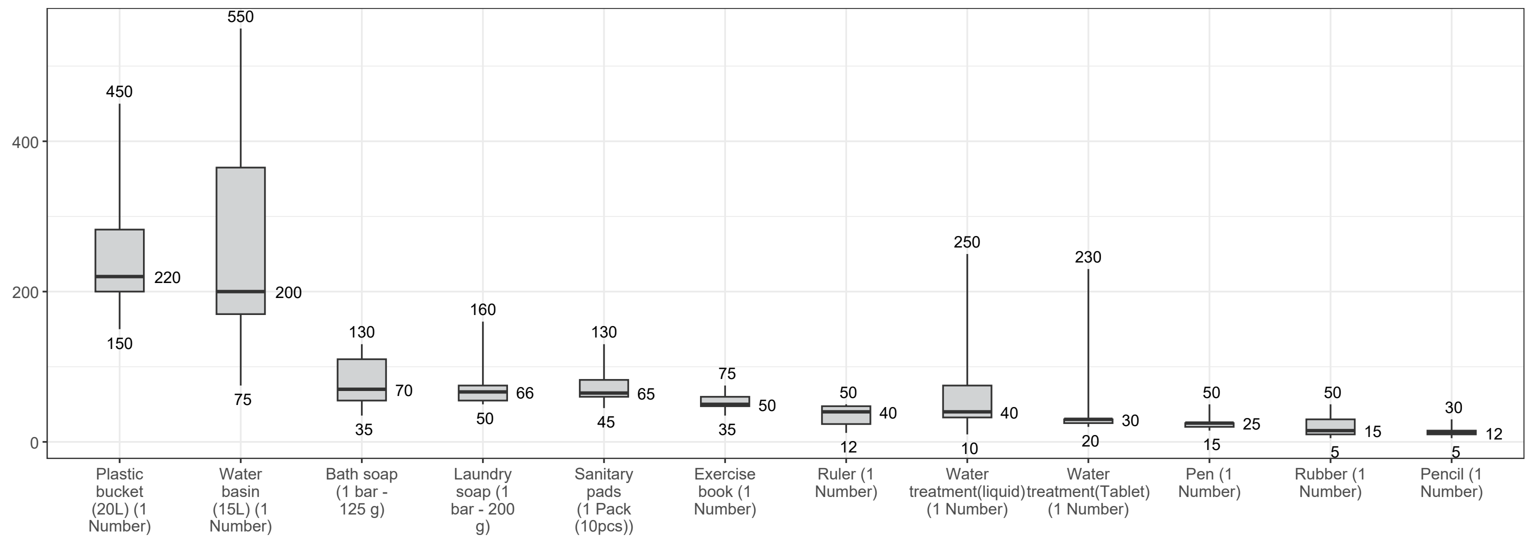
ANNEX 1: Distribution of Prices

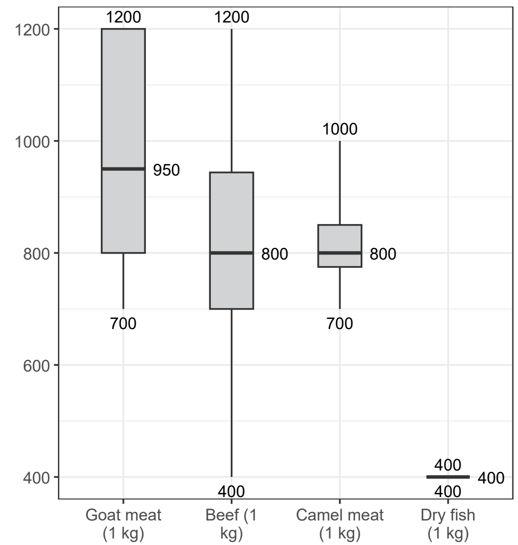
Food Items



NFIs



Meat and Fish Items



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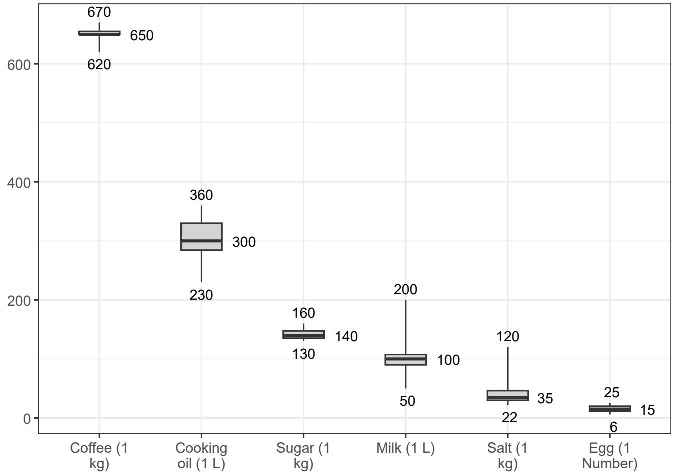
Other Food Items



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