Kenya | Joint Market Monitoring Initiative (JMMI)

Q4 (October - December, 2024)

MARKET OVERVIEW

INTRODUCTION

To inform humanitarian cash programming, the Kenya Cash Working Group (KCWG) launched the Joint Market Monitoring Initiative (JMMI) in March 2022. Conducted quarterly in collaboration with local and international NGOs, the JMMI assesses the availability and prices of essential commodities typically sold in markets and consumed by the average household in Kenya's arid and semi-arid land (ASAL) counties. These commodities include food, water, and various non-food items such as hygiene products and education-related essentials. The price data collection for Q4 2024 was conducted between the 8th and 23rd of December 2024.

Following the December 2024 drought classification by the National Drought Management Authority (NDMA), the drought situation remained normal across majority of the ASAL counties. This was attributed to the October-November-December (OND) rainy season which contributed to the favourable condition. Most, (20) ASAL counties were in the "Normal" drought phase.[2] However, Mandera, Kilifi and Wajir counties were in the alert drought phase, and drought conditions were worsening across most ASAL counties, with many experiencing below-average rainfall.[2]

This factsheet presents an overview of prices for key foods and non-food items (NFIs) in the assessed areas, as well as the costs associated with key elements of the Minimum Expenditure Basket (MEB)[1] components. Additionally, it evaluates the supply chains along with the vendors' perceptions of the marketplace and their commercial operations to better understand market dynamics.

Q4 2024 ASAL COVERAGE

1,815	Vendors interviewed
202	Markets assessed
34	Commodities assessed
14	Participating agencies
12	Counties assessed

**For more information on the methodology, please refer to page 10.*

KEY INDICATORS

Cost of Food MEB[1]	Cost of Non-Food MEB[1]	Cost of Total MEB[1]
13,817 KES	4,898 KES	19,179 KES
106.45 USD[3]	37.74 USD[3]	147.76 USD[3]
▼ 1,002 KES (7%)[4]	▲ 597 KES (14%)[4]	▲ 45 KES (0%)[4]

ASSESSED COUNTIES AND MEDIAN TOTAL MEB VALUES

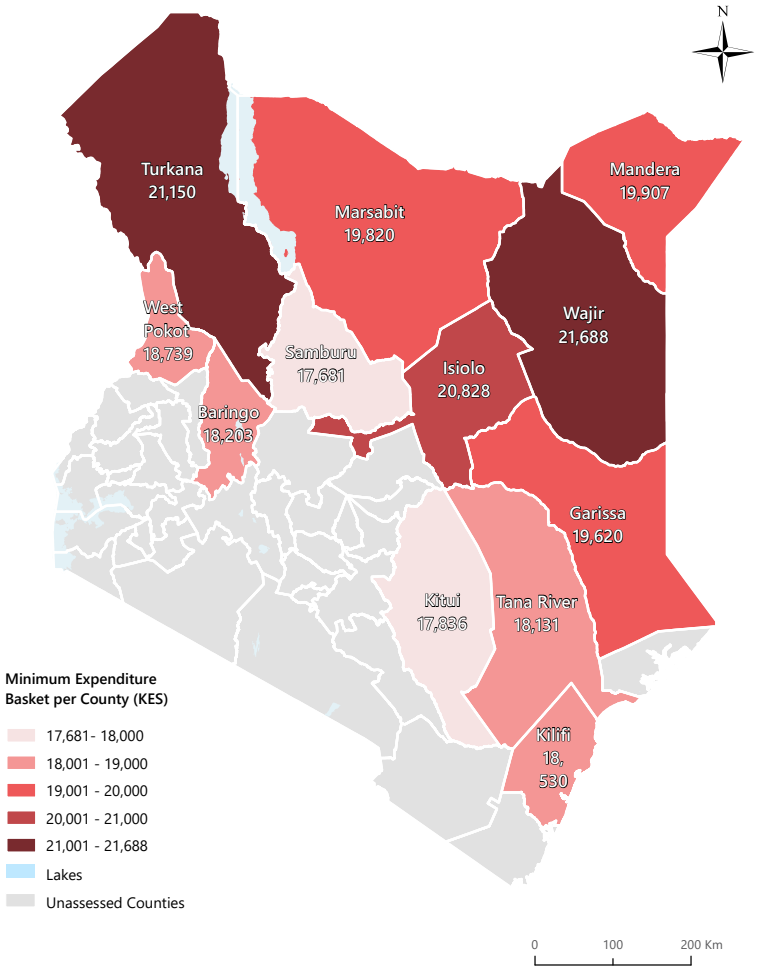


Figure 1: Map on the Q4 2024 assessed counties and MEB values

KEY FINDINGS

- Overall, the median cost of the **food MEB decreased by 1,002 (7%) Kenya Shillings (KES)**. Meanwhile, the national NFI MEB increased by 14%, as the cost of water doubled, contributing to the overall increase.
- **Wajir had the highest overall MEB cost at 21,688 KES**, consistent with the previous quarter. Turkana recorded the highest food MEB cost at 16,523 KES, despite a 1% decrease from the previous round. Isiolo had the highest NFI MEB cost at 7,019 KES, reflecting a 29% increase from the previous quarter.
- A majority (98%) of vendors reported facing various challenges, including a lack of funds and rising stock prices, and a decline in customer numbers. Notably, more female vendors (58%) than male vendors (49%) reportedly faced vendor-related challenges.
- Markets appear to be physically accessible, with 72% of vendors interviewed reporting no physical barriers. However, an equal proportion (72%) also reported their customers experiencing financial difficulties, limiting their purchasing power and affecting overall demand.

ONLINE DASHBOARD

An interactive dashboard is available online to explore the data collected through the JMMI, such as the prices of monitored items, as well as the cost of the MEB in different ASAL counties in Kenya and time periods. To use the online dashboard, click here.

KENYA CASH WORKING GROUP

MINIMUM EXPENDITURE BASKET (MEB)

The MEB[1] is composed of essential commodities and services and represents the average minimum cost of the culturally adjusted basic items required to support a six-person household (HH) for one month.

The cost of the MEB can be used as a proxy for the expenses facing a six-person HH to cover its basic needs for one month. Only the MEB's key elements i.e. food and NFIs as defined by the KCWG were incorporated into computing the MEB.

Food Items	Quantity
Maize flour	32.25 Kg
Rice	22.5 Kg
Cowpeas	7.5 Kg
Oil, Vegetable	5.25 L
Dried beans	7.5 Kg
Cow milk, whole, not fortified	22.5 Kg
Leafy vegetables, dark green	15 Kg
Salt, Iodized	0.75 Kg
Sugar	0.75 Kg

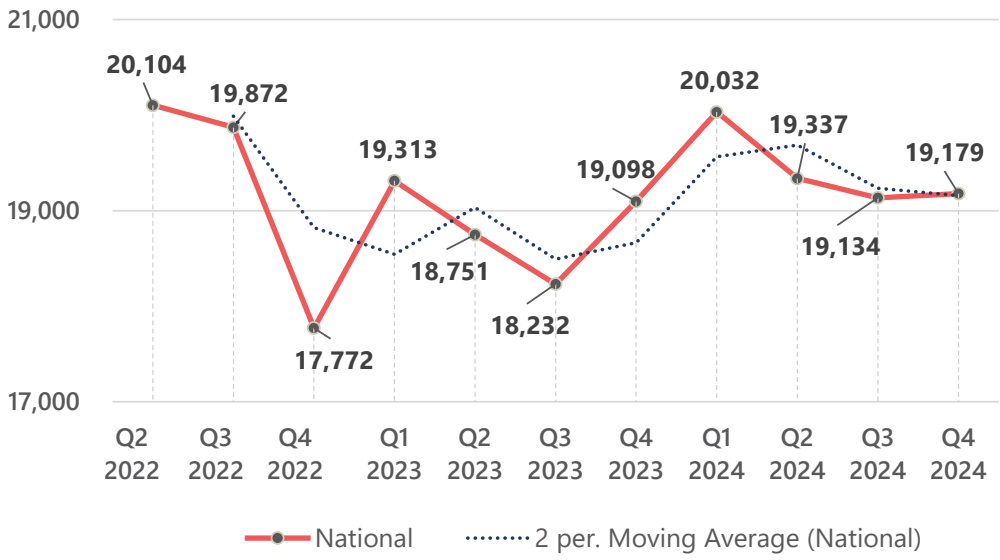
Non-Food Items	Quantity
Water	1,125 L
Multipurpose soap	2.2 Kg
Toothpaste	0.425 L
Sanitary pads	2 packs of 8
Education (pen, pencil, book, rubber, sharpener)	2 stationary kits
Charcoal	12 Kg
Solar Lamp	1 piece
National Health Coverage	500 KES
Communication (Airtime)	300 KES
Public transport	200 KES

COST OF THE MEB IN KES[3] AND CHANGE SINCE Q3 2024

County	MEB[1]	Change since Q3 2024	Food MEB	Change since Q3 2024	NFI MEB	Change since Q3 2024
Wajir	21,688	▲ 5%	16,172	▲ 2%	5,516	▲ 15%
Turkana	21,150	▲ 3%	16,523	▼ 1%	4,628	▲ 20%
Isiolo	20,828	▲ 5%	13,809	▼ 4%	7,019	▲ 29%
Mandera	19,907	▲ 2%	15,017	▼ 1%	4,890	▲ 14%
Marsabit	19,820	▲ 4%	13,825	▲ 2%	5,995	▲ 10%
Garissa	19,620	▲ 3%	13,579	▼ 8%	6,041	▲ 40%
West Pokot ●	18,739		14,166		4,573	
Kilifi ●	18,530		13,430		5,100	
Baringo	18,203	▼ 5%	14,175	▼ 7%	4,028	▲ 5%
Tana River	18,131	▲ 4%	13,287	0%	4,844	▲ 19%
Kitui ●	17,836		12,930		4,906	
Samburu	17,681	▲ 8%	13,196	▲ 9%	4,485	▲ 4%

● : No MEB evolution data has been reported due to the absence of data collection in Kilifi, Kitui, and West Pokot Counties during the previous round (Q3 2024).

NATIONAL MEB (KES[3]) TRENDS OVER TIME



Q4 2024 MEB TAKEAWAYS

- The Agricultural Sector Survey conducted by the Central Bank of Kenya (CBK) in November 2024 indicated a decline in the prices of several food commodities relative to October and September.[5] However, prices for sugar and leafy vegetables, including kale and spinach, increased due to seasonal factors.[5]
- At the same time, seasonal forecasts identified Kenya as one of the countries at high risk of La Niña impacts, with above-average temperatures expected.[6] These climatic conditions have worsened water access challenges in Baringo, Isiolo, Mandera, and Wajir, where high evaporation rates and early cessation of the OND 2024 short rains have led to the depletion of harvested water.[2] Reduced water availability could further affect agricultural production and food prices, especially in ASAL counties.
- As a result, the overall MEB increased across the majority of assessed counties, driven primarily by the increased cost in the NFI. The higher MEB places additional financial strain on households, leading to reduced purchasing power, which in turn negatively impacts food security and overall well-being.

FOOD AND NFI PRICE COMPARISON

- Among the monitored food items, only salt (+12%), kales (+3%), cattle milk (+2%) and sugar (+2%) showed an increase in prices compare to the previous quarter. However, most food items prices remained unchanged or decreased. The largest drop in prices was observed in maize flour (-15%), fresh vegetables, including cabbage (-32%), spinach (-11%), and onions (-7%), between September and December 2024.
- The NFI with the highest median price increases was the cost of refilling a 20-liter jerry can of water, which doubled due to decreased availability of water.

COST OF THE MEB IN KES[5] AND CHANGE SINCE PREVIOUS ROUND

Items	Overall median cost	Change[4]	Baringo	Garissa	Isiolo	Kilifi	Kitui	Mandera	Marsabit	Samburu	Tana River	Turkana	Wajir	West Pokot
White maize (1 Kg)	76	▼ 5%	40	82.5	70	50	50	115	80	60	80	100	100	72.5
Maize flour (1 Kg)	85	▼ 15%	75	95	87.5	70	80	125	100	65	80	100	100	82.5
Beans (1 Kg)	150	0%	170	175	125	120	160	177.5	100	140	150	150	150	140
Cowpeas (1 Kg)	158.75	▼ 9%	130	170	157.5	150	100	225	160	200	120	187.5	150	180
Pigeon peas (1 Kg)	165	▼ 6%	*	170	160	200	120	*	267.5	180	160	150	177.5	140
Rice (1 Kg)	130	▼ 7%	140	135	130	120	130	130	120	130	120	140	170	130
Sugar (1 Kg)	152.5	▲ 2%	160	147.5	155	160	160	140	150	150	160	180	150	145
Wheat flour (1 Kg)	100	▼ 5%	120	100	115	90	95	110	120	110	100	100	100	100
Vegetable oil (1 L)	300	0%	320	342.5	310	260	270	222.5	300	300	300	300	300	300
Tea leaves (50 g)	25	▼ 9%	22.5	20	30	33	25	27.5	20	25	30	40	25	30
Salt (200 g)	11.25	▲ 12%	15	15	10	10	10	20	10	10	10	15	12.5	12.5
Cattle milk (1 L)	122.5	▲ 2%	140	77.5	120	140	120	100	125	120	120	200	160	140
Onions (1 Kg)	111.25	▼ 7%	90	122.5	107.5	140	70	120	120	120	100	115	100	80
Tomatoes (1 Kg)	95	▼ 5%	65	87.5	75	120	80	125	120	80	100	120	100	90
Kale (1 Kg)	87.5	▲ 3%	80	82.5	75	120	80	100	100	80	100	90	85	100
Spinach (1 Kg)	85	▲ 11%	90	75	67.5	115	80	92.5	77.5	80	120	90	80	100
Traditional vegetables (1 Kg)	95	▲ 14%	100	*	150	120	80	*	105	80	90	90	142.5	60
Cabbage (500 g)	102.5	▲ 32%	55	135	105	100	70	165	140	100	100	135	150	62.5
Soap (120 g)**	40		40	50	43.75	30	30	50	50	30	50	30	40	35
Jerry can (20 L)	182.5	▼ 4%	150	200	150	100	110	225	200	200	180	200	185	150
Bucket (20 L)	262.5	▼ 5%	250	325	250	200	280	275	200	250	250	300	280	325
Sanitary pads (8 pack)	100	0%	80	100	100	70	75	100	100	80	95	100	100	100
Refill Liquefied Petroleum Gas (LPG 6 Kg)	1,325	▼ 5%	1,300	1,350	1,263	1,375	1,300	*	1,500	1,300	1,325	1,450	1,550	1,300
Firewood (1 bundle)	100	▼ 20%	*	100	175	100	55	175	150	275	100	150	60	100
Charcoal (2 Kg)	70	0%	70	70	95	70	50	205	167.5	50	50	50	100	50
Kerosene (1 L)	180	0%	*	172.5	150	240	167.5	200	180	150	190	*	190	*
Pencil (1 pc)	10	0%	10	12.5	10	5	10	10	10	5	10	10	10	8.75
Pen (1 pc)	10	0%	10	15	12.5	10	10	20	10	10	10	10	20	15
Exercise book (1 pc)	16.25	▼ 7%	17.5	30	12.5	10	15	40	15	20	15	17.5	20	12.5
Rubber (1 pc)	10	0%	7.5	10	10	5	10	15	10	5	10	10	10	7.5
Sharpener (1 pc)	10	0%	10	10	10	5	10	11.25	10	5	7.5	10	10	7.5
Water refill from a tap stand or borehole (20 L)	20	▲ 100%	5	32.5	50	7.5	20	5	25	15	20	20	21.25	15
Toothpaste (35 ml)	60	▲ 20%	60	77.5	65	60	80	50	50	80	50	52.5	50	70
Solar lamp (1 pc)	562.5	▼ 6%	500	450	625	1,700	600	312.5	650	500	500	600	900	525

* No price data collected as a result of the unavailability of the respective commodity at the time of data collection.

** No price comparison is provided due to the unit change collected from 200g in previous rounds to 120g, based on market availability.

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

Items [7]	Number of KIs interviewed per item	Wide availability (% KIs)	Limited availability (% KIs)	Complete unavailability (% KIs)
White maize (1 Kg)	484	90%	7%	2%
Maize flour (1 Kg)	769	96%	3%	1%
Beans (1 Kg)	760	92%	7%	1%
Cowpeas (1 Kg)	150	58%	41%	1%
Pigeon peas (1 Kg)	100	59%	40%	1%
Rice (1 Kg)	806	96%	3%	1%
Sugar (1 Kg)	802	97%	2%	1%
Wheat flour (1 Kg)	735	94%	4%	2%
Vegetable oil (1 L)	701	95%	3%	1%
Tea leaves (50 g)	719	97%	2%	1%
Salt (1 Kg)	771	97%	2%	1%
Cattle milk (1 L)	519	90%	10%	0%
Onions (1 Kg)	562	78%	22%	1%
Tomatoes (1 Kg)	546	75%	24%	1%
Kale (1 Kg)	246	75%	25%	0%
Spinach (1 Kg)	180	72%	27%	2%
Traditional vegetables (1 Kg)	83	63%	37%	0%
Cabbage (500 g)	482	75%	25%	1%
Soap (200 g)	710	96%	3%	0%
Jerry can (20 L)	380	73%	26%	1%
Bucket (20 L)	246	68%	32%	0%
Sanitary pads (8 pack)	472	86%	14%	0%
LPG 6 Kg refill	149	58%	39%	3%
Firewood (1 bundle)	153	76%	24%	0%
Charcoal (2 Kg)	254	76%	23%	0%
Kerosene (1 L)	63	52%	48%	0%
Pencil (1 pc)	524	90%	9%	1%
Pen (1 pc)	552	89%	10%	1%
Exercise book (1 pc)	460	89%	10%	0%
Rubber (1 pc)	315	86%	13%	0%
Sharpener (1 pc)	369	88%	12%	0%
Water refill from a tap stand or borehole (20L)	142	56%	42%	1%
Toothpaste (15 ml)	326	85%	14%	1%
Solar lamp (1 pc)	146	51%	46%	3%

Items	Remaining stock (days)	Time needed to restock (days)
White maize (1 Kg)	14	1
Maize flour (1 Kg)	12	1
Beans (1 Kg)	14	1
Cowpeas (1 Kg)	20	1
Pigeon peas (1 Kg)	21	1
Rice (1 Kg)	14	1
Sugar (1 Kg)	10	1
Wheat flour (1 Kg)	14	1
Vegetable oil (1 L)	14	1
Tea leaves (50 g)	14	1
Salt (1 Kg)	18	1
Cattle milk (1 L)	7	1
Onions (1 Kg)	6	1
Tomatoes (1 Kg)	3	1
Kale (1 Kg)	2	1
Spinach (1 Kg)	2	1
Traditional vegetables (1 Kg)	1	1
Cabbage (500 g)	4	1
Soap (200 g)	14	1
Jerry can (20 L)	21	1
Bucket (20 L)	21	1
Sanitary pads (8 pack)	22	1
LPG 6KG refill	20	2
Firewood (1 bundle)	7	1
Charcoal (2 Kg)	7	1
Kerosene (1 L)	10	1
Pencil (1 pc)	25	1
Pen (1 pc)	21	1
Exercise book (1 pc)	21	1
Rubber (1 pc)	30	1
Sharpener (1 pc)	25	1
Water refill from a tap stand or borehole (20L)	***	***
Toothpaste (15 ml)	20	1
Solar lamp (1 pc)	30	2

*** No information regarding the remaining stock days and the time needed to restock water was collected.

Over a third (35%) of vendors self-reported limited or no availability of some commodities. Additionally, among the vendors (65%) who reported experiencing difficulties in restocking, 13%[8] cited unavailability of core commodities.

Cowpeas (41%), pigeon peas (40%), and traditional vegetables (37%) were among the food items for which a higher proportion of vendors self-reported limited availability. As a result, the absence of vendors selling pigeon peas and traditional vegetables led to gaps in price data in Baringo, Garissa and Mandera counties. This is likely due to local dietary preferences or seasonality of the produce, in the specific case of leafy vegetables.

Among the NFIs, sources of energy such as kerosene (48%) and solar lamps (46%) followed by cooking gas (31%) were found to have the highest proportion of interviewed vendors reporting limited availability within the market at the time of data collection.

Despite the reported challenges, the restocking time for both food and NFIs was mostly one day. The short time needed to restock suggests a low likelihood of commodity shortages. The frequency of consumable items such as food, soap and charcoal would need to be distributed more frequently than non-consumable items such as solar lamps and buckets.

MAIN SUPPLY ROUTES

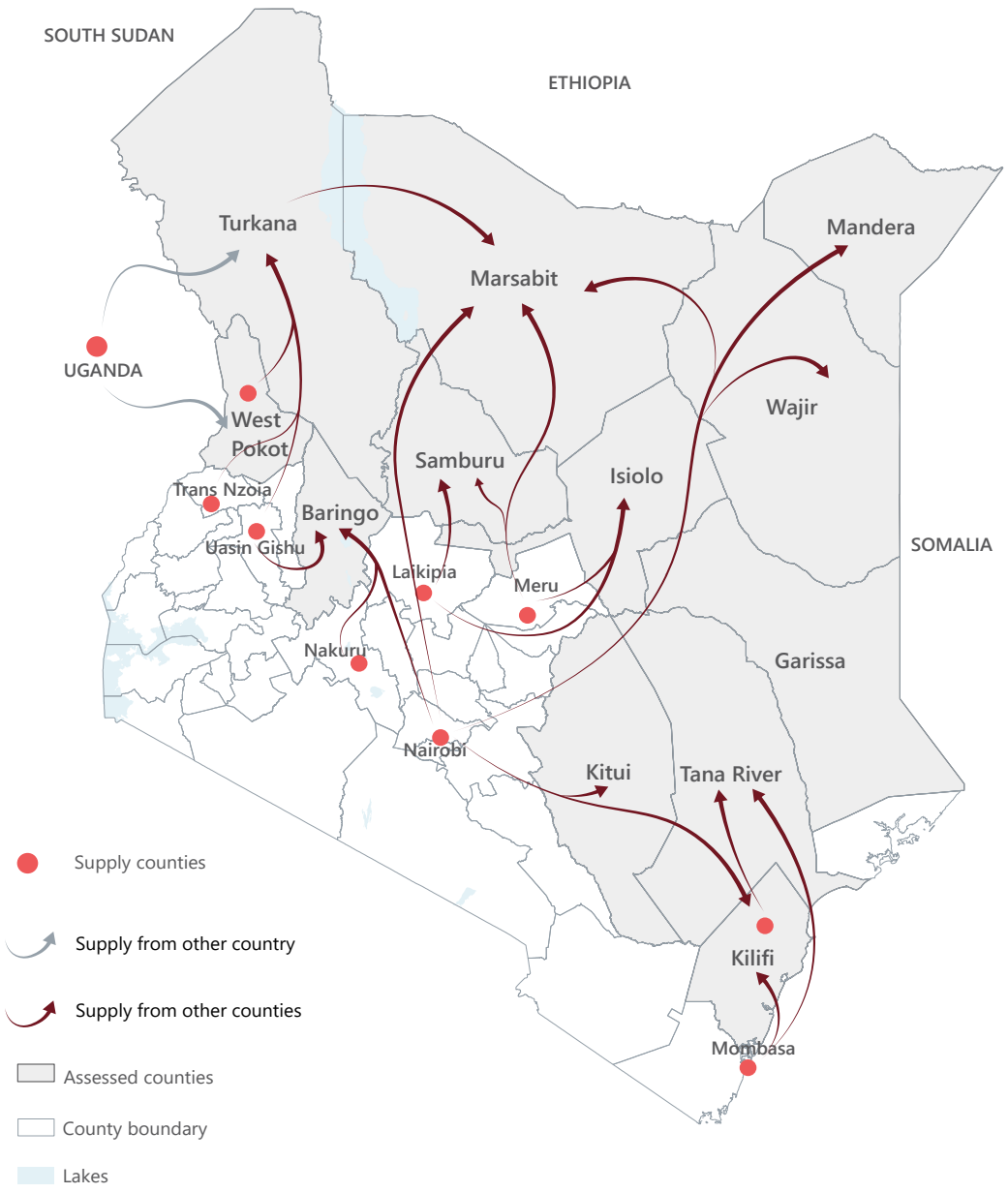


Figure 2: Map of main supply route of assessed counties

LOCATION OF MAIN SUPPLIER

Figure 2 presents the supply route map, illustrating the supply routes of commodities from main suppliers as reported by interviewed vendors. These insights into supply routes are important for assessing market resilience.

Almost all vendors indicated that their main supplier was located within Kenya, primarily within their respective counties, followed by neighboring counties. Notably, many vendors sourced commodities from Nairobi County, the capital and Meru County, a major agricultural producing regions in Kenya.[9]

Very few (n=3)[10] vendors reportedly sourced commodities from neighboring countries, which vendors in border counties of Turkana and West Pokot reported sourcing from Uganda.

REPORTED PREDICTED CHANGES IN SUPPLIERS' PRICES

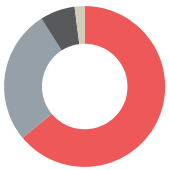
Close to three-quarters (70%) of the interviewed vendors stated that they could predict price changes in popular commodities one month from the time of data collection, findings similar to the previous quarter.

Most (64%) of vendors who were able to predict prices stated that prices are likely to increase. Despite the decline in prices for certain food items, data from the Kenya National Bureau of Statistics (KNBS) showed that producer prices for food products increased by 3.23% in December 2024 compared to September 2024.[11] This overall increase suggests that businesses may transfer these rising costs to consumers, potentially leading to higher prices in the coming months.

Proportion of vendors reporting their ability to predict supplier price changes for popular commodities in the one month after data collection:***

Yes	70%
No	14%
Do not know	16%

Expectation of supplier price changes one month following data collection, by % of vendors who reported being able to predict supplier price changes (70%):



Increase	64%
No change	27%
Decrease	7%
No answer	2%

*** This is a self-reported question by the vendors, and opinions may change from one vendor to another.

SUPPLIER

% of vendors reporting that they mostly relied on a single supplier for food items at the time of data collection:

Yes	36%
No	63%
Do not know	1%

% of vendors reporting that they mostly relied on a single supplier for NFIs at the time of data collection:

Yes	29%
No	69%
Do not know	2%

At the time of data collection, the majority of interviewed vendors (63% for food items and 69% for NFIs) reported relying on multiple suppliers. This trend was observed across most assessed counties, except for vendors in Garissa (52%) and Wajir (51%), who reportedly sourced food items from a single supplier.

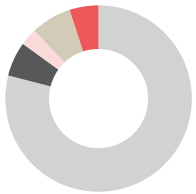
Vendors who rely on a sole supplier are vulnerable to supply disruptions, which may arise from having limited alternative options. Sourcing from multiple suppliers can help in obtaining competitive pricing and ensuring continuous availability of a wide range of products.

ACCESS TO A LOCKED, SECURED STORAGE FACILITY

In the 3 months prior to data collection, most vendors (79%) reported having access to a locked or secure storage facility within the marketplace. Such access provides several benefits, reducing the risk of theft, vandalism, and damage from environmental factors. This helps maintain product quality and shelf life, positively affecting the profitability and sustainability of their businesses.

Conversely, very few (3%) vendors had storage facilities located outside the marketplace or at their homes. Only 5% had no access to storage at all, which likely limits their ability to keep adequate stock and restricts their product offerings.

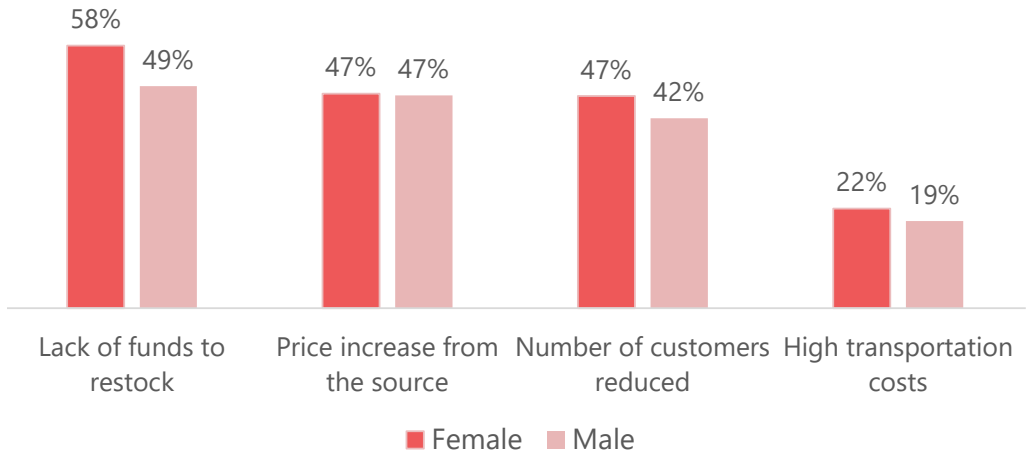
% of vendors reporting on access to a locked, secured storage facility within the marketplace in the 3 months prior to data collection:



79%	Yes, storage within own business facility
6%	Yes, storage elsewhere within the marketplace
3%	No, storage outside the marketplace at another facility
7%	No, storage at home
5%	No storage facility

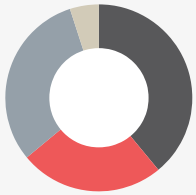
CHALLENGES FACED BY VENDORS

Most reported challenges faced in the 3 months prior to data collection, by % of all interviewed vendors by gender :[8]



CHANGE IN THE NUMBER OF VENDORS

Proportion of vendors reporting on changes in the number of vendors operating in their marketplace in the 3 months prior to data collection:



Increase	39%
Decrease	25%
No change	31%
Do not know	5%

% of vendors estimating the proportion of businesses that had stopped operating in their marketplace in the 3 months prior to data collection among the vendors (25%) who reported a decrease:

Very few (1%-10%)	60%
Few (11%-25%)	23%
Some (26%-50%)	6%
A lot (51%-75%)	3%
Most (76%-100%)	6%
Do not know	1%

The most commonly reported challenges were a lack of funds to restock (58% of female vendors and 49% of male vendors)[8] and price increases from the source (47%[8] for both female and male vendors). These challenges hinder vendors' ability to purchase additional stock and compromise business profitability. Overall, more female vendors reported challenges than male, except for price increases from suppliers, which affected both equally (47%). Only 2% of vendors reported not facing challenges.

DIFFICULTY IN KEEPING THE BUSINESS OPERATIONAL AND WELL STOCKED

Most reported restocking challenges at the time of data collection, by % of all interviewed vendors:[8]

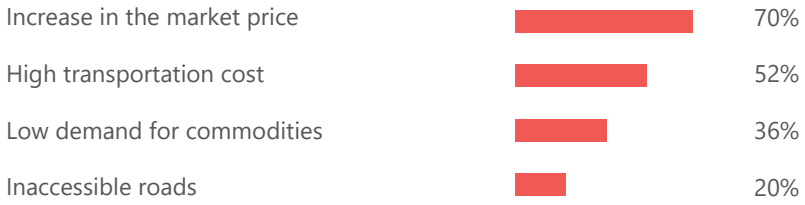
- **44%** Difficulty with price charged by supplier
- **21%** Unpaid market purchases made on credit
- **13%** Difficulty with availability of core goods
- **12%** Lack of funds to restock

Almost two-thirds (66% female and 65% male) of the interviewed vendors reported having faced difficulties keeping their businesses operational and well-stocked. The most frequently reported difficulty by male (44%) and female (43%) vendors is the high price charged by suppliers, despite the reported decrease in food prices. This, along with the outstanding debt from goods purchased on credit, implies that vendors may strain to maintain their inventory. These challenges affect vendors' ability to purchase additional stock and compromise the profitability of the business.

Essentially, vendors are facing multiple obstacles related to affordability and lack of financial resources, which are crucial factors impacting their ability to operate and maintain their businesses.

SHORTAGE OF COMMODITIES

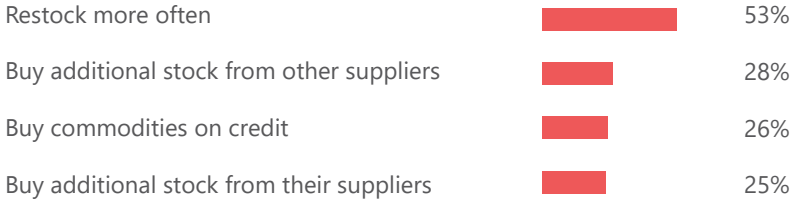
Most reported causes of shortages for commodities at the time of data collection, by % of vendors (35%) who reported limited availability or complete unavailability of some commodities:[8]



Increase in the market prices (70%)[8] and the high transportation costs (52%)[8], were identified as contributing factors to shortages by vendors (35%) experiencing limited or complete unavailability of some commodities. Inaccessible roads were cited as a key factor contributing to commodity shortages by 20% of vendors, limiting their ability to restock and meet customer demand. Also, the low demand for commodities can be attributed to the reported decrease in the number of customers which vendors identified as a challenge.

COPING MECHANISMS EMPLOYED

Most reported strategies used by interviewed vendors to address unavailability of commodities at the time of data collection, among 35% of vendors who reported experiencing shortages of some commodities: [8]



The primary coping mechanism for vendors facing shortages is to restock more frequently, often by purchasing additional stock from alternative suppliers or acquiring goods on credit from the market. However, vendors in Baringo (25%), Tana River (13%), and Wajir (11%) reported the highest instances of having no coping mechanisms in place. This lack of adaptive strategies leaves them particularly vulnerable to revenue loss and business disruptions during periods of shortage.

CHALLENGES FACED WHEN TRANSPORTING COMMODITIES

Most reported transportation challenges in the 3 months prior to data collection, by % of all interviewed vendors:[8]

- **64%** High cost of transport
- **30%** Unusable roads
- **20%** Distance is too far to cover on foot
- **17%** Limited transportation options

Across all assessed counties, the most commonly reported transportation challenge is the high cost of transport, driven possibly by poor road conditions, long distances, fuel prices, and limited access to affordable transportation options.

More than half (52%) of vendors reported receiving deliveries from suppliers, while 47% sourced their commodities directly. The high cost of transportation may lead businesses to pass this burden onto consumers by increasing commodity prices.

The most common means of transport were the use of passenger vehicles (38%), followed by the use of motorcycles (16%) and lorry (13%) when restocking commodities.

Most reported mode of transport commonly used by vendors when restocking commodities:

1. 38% Passenger cars
2. 16% Motorcycle
3. 13% Lorry

BARRIERS TO MARKET ACCESS

Physical barriers

Marketplaces appeared to be accessible as 72% of interviewed vendors reported that they did not face any issues with physically accessing the marketplace. The presence of any physical access barriers was greatest in Samburu (59%), Kitui (41%) and Mandera (40%) counties.

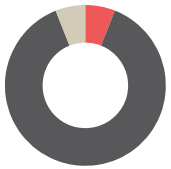
Most reported physical barriers to accessing the marketplace in the 3 months prior to data collection, by % of all interviewed vendors:[8]

- **12%** Limited transportation options
- **9%** Hazard and damage on roads
- **7%** Limited operating hours of the market
- **4%** Inadequate facilities

Social barriers

Garissa County had the highest proportion of vendors (12%) reporting social barriers that led people to avoid the marketplace.

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



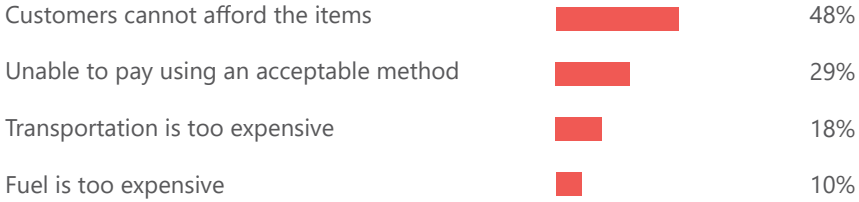
Yes	6%
No	88%
Don't know	6%

Financial barriers

Most (72%) of vendors indicated that most customers faced financial obstacles in accessing the marketplace. The majority reported that their customers encountered financial difficulties related to both reaching the business and paying for goods, as perceived by the assessed vendors.

The primary financial challenge reported by most vendors was customers' inability to afford the available items, followed by difficulties with payment methods, which likely resulted in fewer customers. Furthermore, 18% of vendors cited public transportation costs as a limiting factor, while 10% pointed to fuel expenses as a barrier to marketplace access.

Most reported financial barriers to accessing the marketplace in the 3 months prior to data collection, by % of all interviewed vendors:[8]



SECURITY ISSUES

Most reported security factors that negatively impacted businesses in the 3 months prior to data collection, by % of all interviewed vendors:[8]

Samburu (59%) had the highest proportion of vendors reporting that security factors negatively impacted them. Turkana (43%) and Isiolo (42%) also had a high proportion of vendors, reporting experiencing security-related issues. The most reported security threat being the fear of robbery. These counties are among those affected by conflict, with intercommunal tensions fueled by competition over natural resources and external factors. Samburu County faces a resurgence of insecurity, including incidents of banditry, while Turkana experiences both internal and external security threats, such as boundary disputes with South Sudan and incursions from neighboring communities.[12]

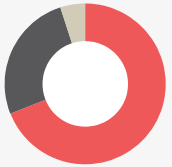
ACCEPTABLE MODE OF PAYMENT

Most reported accepted payment methods by vendors in the 3 months prior to data collection:[8]

1. 98% Cash (local currency)
2. 75% Mobile money
3. 20% Informal credit
4. 6% Credit/Debit cards
5. 5% Money transfers

CHANGE IN THE NUMBER OF CUSTOMERS

Proportion of vendors reporting changes in the number of customers purchasing from their shops in the 3 months prior to data collection:



Yes	69%
No	26%
Do not know	5%

% of vendors reporting on the change in the number of customers purchasing from their shop in the 3 months prior to data collection, among those vendors (69%) who reported a change:

Decrease	71%
Increase	29%

MARKET FUNCTIONALITY SCORE (MFS)

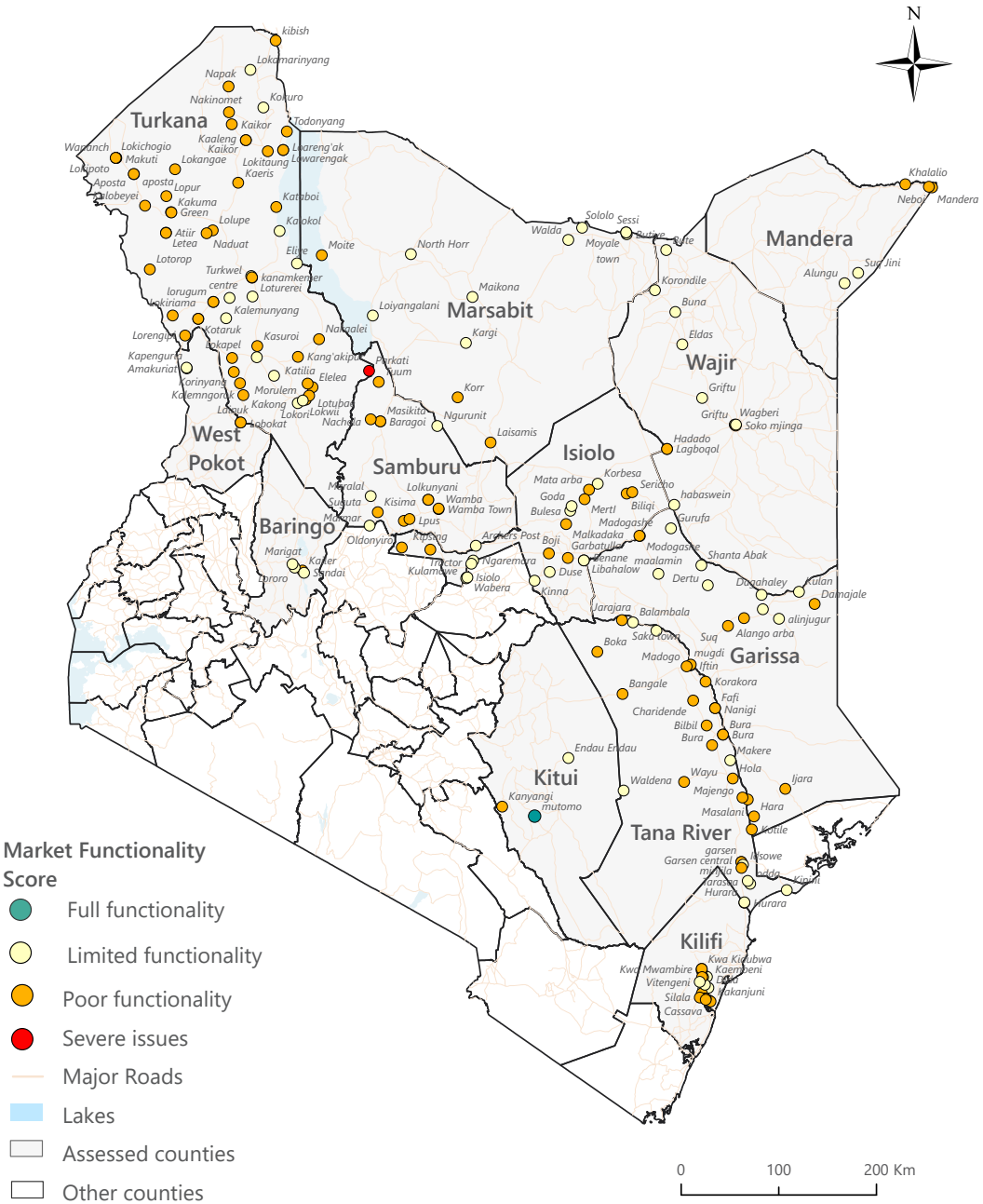


Figure 3: Map of market functionality of Q4 2024 assessed markets

MARKET FUNCTIONALITY

Market functionality, an extension of the JMMI, brings together indicators from all segments of the JMMI assessment and is based on the following five key 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.

Each of these dimensions contributes to a market's ability to both supply customers with core food and non-food items and enable market vendors to conduct business. Markets' classification is determined by assessing each market's level of functionality by assigning a market functionality score (MFS).[13] This can help aid actors understand which markets function well enough to be good targets for cash and voucher assistance (CVA) and which require alternative forms of market-based programming (MBP) to help them become self-sufficient.

Similar to previous assessments,[14] affordability was the least-performing dimension, with the majority (89%) of the assessed markets scoring below 50% of the maximum weighted score of 15%. This dimension is based on price comparisons of monitored items against the national medians, customers' financial access, and price predictability of commodities.

The dimension with the highest overall performance was infrastructure, with only 2 of the 202 assessed markets achieving less than 50% of the maximum score within this dimension. This dimension considers the quality of facilities, storage options and payment modalities. The widespread use of mobile money platforms in Kenya provides an alternative payment method to cash strengthening the financial infrastructure within the markets.

Out of the 202 markets assessed, the majority of markets across the country are facing functionality issues, with 118 markets (58%) classified as poor functionality. Only 1 market - Mutomo in Kitui County was classified as fully functional. The remaining (41%) assessed markets -82 markets - were found to have limited functionality. On the other hand, Parkati Market in Samburu County was identified as having severe functionality issues due to its remote location and the very few number of vendors operating in the market.

However, the MFS computation is limited, as it relies on five dimensions to classify the markets and may not incorporate all relevant attributes. Therefore, market functionality results should be interpreted relatively and supplemented with local knowledge of market dynamics in each county. Markets in remote areas within the ASALs, which may adequately serve local communities, often have few vendors. Consequently, fewer surveys are conducted, potentially adversely affecting scores on availability and affordability, leading to a less favorable market classification.

Methodology

The JMMI is conducted jointly with KCWG partners. The geographic coverage was determined by the access and capacity of participating partners. The participating agencies collectively developed and reviewed the data collection tools and trained their enumerators on the JMMI methodology and data collection tools. Primary data was collected through structured interviews with vendors (who sell directly to customers) in the targeted marketplaces. Enumerators were asked to record three prices per item in each targeted marketplace. Data was collected through the KoboCollect mobile application and was uploaded to a secure Kobo server for cleaning and analysis.

For each item, the median prices per marketplace were calculated, after which the median of all those locations was calculated to derive the aggregated median prices presented in this factsheet. This methodology is derived to minimise the effects of outliers and differing amounts of data among assessed locations. Outliers are reported only where relevant. Non-numeric indicators of categorical values are calculated as proportions.

Using the purposive sampling method, 1,815 vendors were interviewed as key informants. A target of at least three prices per item in each of the assessed counties were collected for a total of 34 basic food and NFIs. The interviews were conducted both face-to-face and remotely with vendors selling food and non-food items. Data was collected between 8th and 23rd December 2024 across 202 markets in the assessed counties.

REACH Initiative performed daily data quality checks with the partners during and after data collection. This process includes checking for duplicate interviews and numerical outliers (particularly item prices). Data was analysed at the county level using R statistical software.

All findings are indicative and only apply to the period within which data was collected. Moreover, item specifications may vary slightly between locations according to the different brands available, and comparability between the locations assessed is limited.

Challenges and Limitations

- Price data is only indicative of the time frame within which it was collected. Prices may vary between data collection.
- The methodology specifies that three prices are collected per commodity, per market. Due to the unavailability of multiple vendors selling various commodities at the market, it was not possible to collect 3 prices for some commodities in some markets.
- For some questions such as the challenges faced by vendors or change in the number of customers required vendors to recall events over a 3-month period. This is a long period of time, which might impact the accuracy of answers.
- The JMMI data collection tool requires enumerators to record the cheapest available price for each item, but does not require a specific brand, as brand availability may vary. Therefore, price comparisons across regions may be based on slight variants of the same product.
- Some vendors lacked weighing scales. An estimate of how much 1 Kg was used for commodities such as vegetables, onions, and tomatoes. In some cases, the estimation may not have been accurate.
- The lack of visual confirmation and likelihood of response bias for data collected via mobile phone.
- Some changes in the overall median prices may be driven by shifts in coverage rather than by true price.
- Not all sub-counties within the respective counties were assessed except from Samburu and Tana River county.

Endnotes

[1] The Minimum Expenditure Basked (MEB) is defined as what a household requires to meet basic needs on a regular or seasonal basis - and its average cost.

[2] National Drought Early Warning Bulletin by NDMA, December 2024.

[3] 1 USD-129.80 KES in December, 2024.

[4] Change since the last round of JMMI data collection in September 2024 (Q3 2024).

[5] Agricultural Sector Survey by CBK, November 2024.

[6] La Nina Overview by ACAPS, September 2024.

[7] The total percentages may not add up to 100% due to rounding up or respondents choosing "Prefer not to answer" or indicating "I do not know."

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

[9] 2024 Gross County Product by KNBS, December 2024.

[10] Sample size (n) refers to the total number of respondents (in this case vendors) in the sample under study.

[11] Producer Price Index - Fourth Quarter by KNBS, December 2024.

[12] State of security in the North Rift, National Assembly, August 2024.

[13] Market Functionality Score (MFS) is used to classify markets based on their level of functionality. The MFS consists of a collection of indicators, drawn from a single vendor-focused assessment for ease of analysis, that capture data on the five different dimensions of market functionality. The markets are categorized into "full functionality", "reduced functionality", "limited functionality", or "poor functionality" based on the MFS.

[14] ASAL Joint Market Monitoring Initiative, KCWG, September 2024.

About the Kenya Cash Working Group

The KCWG is a multi-agency, inter-cluster technical working group set up to ensure that cash and voucher assistance (CVA) in Kenya is coordinated, harmonised, and context-specific, and is undertaken in a manner that does not inflict harm or exacerbate vulnerabilities of the affected population. The working group was established to provide an enabling environment for collective learning, operational and technical collaboration. Additionally, develop a common reference point for both national and international actors for the harmonization of multi-purpose cash assistance (MPCA) across the country. The KCWG is currently co-chaired by the National Drought Management Authority (NDMA) and Kenya Red Cross Society (KRCS), and the MEB workstream is co-chaired by the World Food Programme (WFP) and REACH Initiative.

Participating agencies