Kenya | Joint Market Monitoring Initiative (JMMI)

Q4, 2023

MARKET OVERVIEW

INTRODUCTION

The Kenya Cash Working Group (KCWG), through the MEB workstream in January 2023, launched the JMMI for refugee camps in Kenya in an effort to understand the degree to which the refugee camps' (Dadaab and Kakuma) markets are functional, integrated, and responsive to the needs of refugees.

Kenya currently hosts approximately 700,000 refugees and asylum seekers in the camps. The survey was conducted in December 2023 (from the 11th to the 19th) during a period of heavy rains and floods. Garissa, one of the affected counties, experienced significant disruptions due to the heavy rains, which caused the River Tana to overflow, making roads impassable and hindering the transportation of commodities and aid.[2]

The above average rains heavily impacted businesses in camps, mainly through the disruption of the supply chain leading to increased prices due to the unavailability of commodities and also in the destruction of shops, market structures, and available stock.[3]

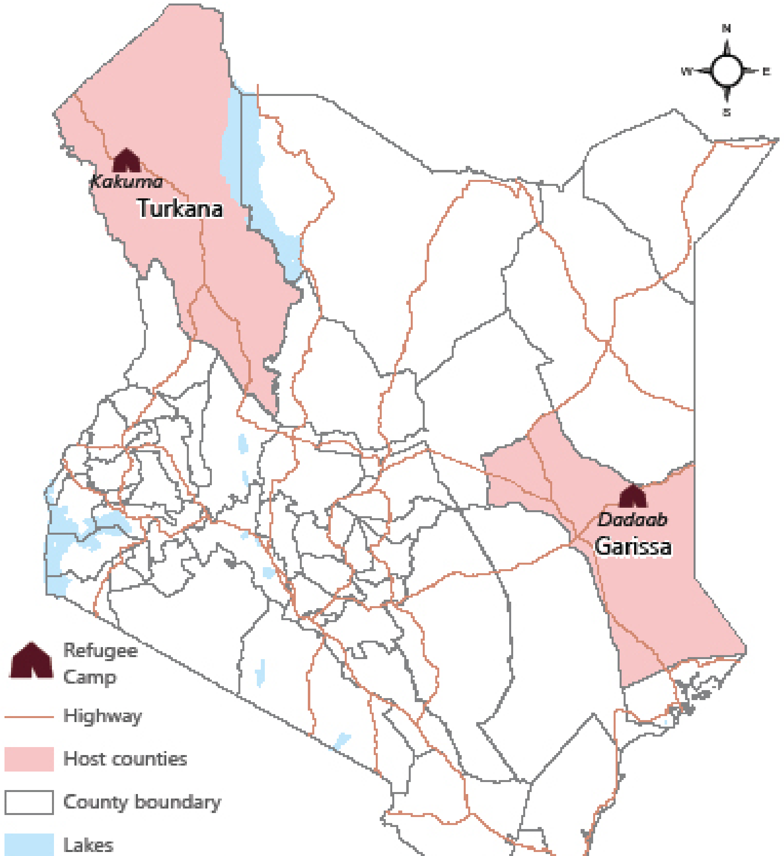
Q4 2023 REFUGEE CAMPS COVERAGE SUMMARY

310	Vendors interviewed
67	Items assessed
13	Markets covered
5	Participating agencies
2	Refugee camps assessed

KEY INDICATORS

Cost of Food MEB[4]	Cost of Non Food MEB[4]	Cost of MEB[4]
13,511 KES	4,995 KES	18,506 KES
83 USD[5]	30.5 USD[5]	121 USD[5]
▲ 694 KES (7%)[6]	▲ 294 KES (2%)[6]	▲ 988 KES (5%)[6]

ASSESSED COUNTIES AND MEDIAN MEB VALUES



Refugee camp	MEB Value (KES)
Dadaab	18,370
Kakuma	18,643

KEY FINDINGS

- The bursting of River Tana banks affected the transport system as markets were reportedly inaccessible due to impassible roads (68%) and limited transportation options (28%) resulting in increased transport cost. Relying on single suppliers exposes vendors to inflated prices and the risk of shortages should the suppliers lack commodities.
- In Kakuma, nearly half of the vendors (48%) reported difficulty in keeping their business operational and well-stocked at the time of data collection. This was mainly due to high transportation cost, shortage of commodities, lack of money to restock and increased suppliers prices.
- Out of the 13 assessed markets, 10 were classified as having limited functionality (2 in Dadaab and 8 in Kakuma) and 3 were found to have poor functionality (1 in Dadaab and 2 in Kakuma). In comparison to Q3, IFO Market improved from poor functionality to limited. However, Dagahaley Market dropped from limited to poor functionality likely as a result of the heavy rains experienced, as there was a reduction in the resilience and availability scores for Dagahaley. In Kakuma, Kalobeyei Village 1, Village 2 and Village 3 markets, improved from poor functionality to limited classification while Ethiopia and Hong Kong Markets dropped from limited functionality to poor functionality.

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REFUGEE MINIMUM EXPENDITURE BASKET (MEB)[4]

The refugee MEB[4] is composed of essential commodities and services. The MEB is used as an operational tool to quantify the average minimum cost of the culturally adjusted basket of basic items required to support a five-person household for one month. Developed by the Kenya Cash Working Group (KCWG) through the MEB work-stream, it differs from the rural MEB[1] by specifically considering refugee needs.

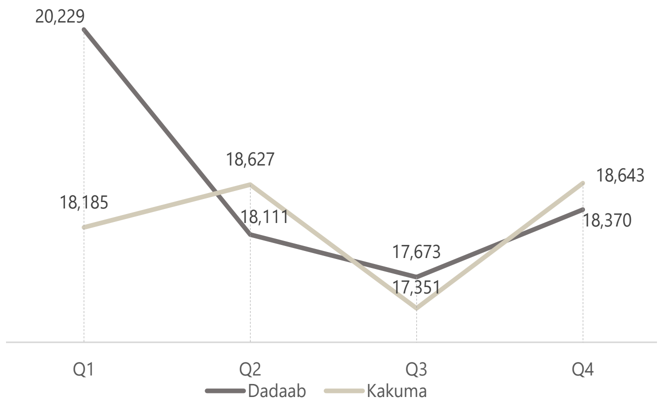
The refugee MEB cost was calculated using food and non-food items (NFIs) that accrue on a monthly basis. Fixed amounts are used for health, transportation, and lighting energy costs. The cost of the refugee MEB serves as a proxy for a household's monthly expenditure on basic needs.

COST OF THE MEB IN KES[5] AND CHANGE SINCE Q3

Camp	Food MEB	Δ	NFI MEB	Δ	MEB	Δ
Dadaab	13,133	▲ 2%	5,237	▲3%	18,370	▲ 2%
Kakuma	13,890	▲7%	4,753	▲8%	18,643	▲ 7%

The cost of MEB increased in both camps. The inflation rate in Kenya dropped slightly to 6.6% in December 2023, from 6.8% in September 2023, according to the Kenya National Bureau of Statistics (KNBS)[7]. The inflation rate remained high due to an increase in prices of commodities and higher fuel prices and public transport costs, hence the slight increase in MEB. The slight variation in the MEB in both camps was brought by variation in prices in both camps.

EVOLUTION OF THE MEB IN KES[5] PER CAMP IN 2023



MEB[4] REFUGEE COMPONENTS:[9]

Sector	Item	Quantity
Food items	Maize grain	21 kg
	Rice	21 Kg
	Wheat flour	21 Kg
	Dried beans	7.5 Kg
	Vegetable oil	5.25 L
	Cow milk, whole, not fortified	15 L
	Leafy vegetables, dark green	15 Kg
	Salt, iodized	0.75 Kg
	Sugar	0.75 Kg
Kitchen ware	Cooking pots	2 pcs
	Frying pan	1 pc
	Cutlery	13 pcs
	Cups	5 pcs
	Plates	5 pcs
	Wooden spoon	1 pc
	Jug	1 pc
	Washing pad	1 pc
Health	National Health Insurance Fund	500 KES
Transport	Public transportation	1000 KES

Sector	Item	Quantity
WASH	Water	3,000 L
	Multi-purpose soap	2.75 Kg
	Toothpaste	0.140 L
	Toilet paper	8 pcs
	Sanitary pads (8 pads)	4 packs
	Toothbrush	10 pcs
	Inner wear	10 pcs
	Water storage containers (20 L)	5 pcs
	10 L bucket	3 pcs
	Sleeping mats	5 pcs
	Blankets	5 pcs
	Mosquito nets	5 pcs
	Water purification supply	150 tablets
Education	School material (pen, pencil, book, rubber, ruler, and sharpener)	1 kit
	Text books	30 pcs
	Geometrical set	3 sets
	School shoes	3 pairs
	School Uniform	5 pcs
	School bag	3 pcs

Sector	Item	Quality
Shelter	Construction costs	7,000 KES
	Irons sheets	20 pcs
	Pine Timber/ Cyprus rafters	700 ft
	Eucalyptus poles	10 pcs
	Pine Timber/ Cyprus rafters	700 ft
	Eucalyptus poles	10 pcs
	Wood preservatives	20 L
	Tower and pad bolts	4 pcs
	Plastic sheets (5m by 4m)	6 pcs
	Ridge cap for roofing	4 pcs
	Eucalyptus/ Blue Gum poles 3m	10 pcs
	Hoop iron	2 Kg
	Butt hinges	3 pairs
	Nails	10 Kg
	Roofing nails	7 Kg
	Sealing nails	1 Kg
Energy	Charcoal	2 kg
	Jiko - medium size	1 pc
	Matchbox	2 Boxes
	Lighting cost	800 KES

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MEDIAN PRICE IN KES[5] AND CHANGE BETWEEN Q3 AND Q4 IN PRICES OF ITEMS PER CAMP

Items	Unit	Dadaab	Change	Kakuma	Change
Food items					
White maize	1kg	85	▼-15%	80	0%
Maize flour	1kg	100	▼-17%	100	0%
Wheat flour	1kg	105	▲ 5%	100	0%
Rice	1kg	120	0%	150	▲ 20%
Spaghetti	500g	90	▲ 9%	90	▲ 12%
Beans	1kg	160	▼-6%	200	0%
Cowpeas	1kg	250	▲ 47%	200	▲ 43%
Cowpeas leaves	1kg	*		100	▲ 25%
Yellow split peas	1kg	100	▼-26%	150	▲ 25%
Sugar	1kg	180	▲ 20%	290	▲ 16%
Vegetable oil	1lt	250	0%	260	▲ 16%
Salt	200g	10	0%	15	▲ 50%
Cattle milk	1lt	180	0%	160	▲ 14%
Camel milk	1lt	180	▲ 20%	200	0%
Goat meat	1kg	800	▲ 33%	700	▲ 17%
Camel meat	1kg	600	▲ 25%	600	▲ 33%
Onions	1kg	200	▲ 43%	160	▲ 20%
Tomatoes	1kg	70	▲ 17%	130	▲ 30%
Kale	1kg	100	▲ 100%	100	▲ 5%
WASH items					
Sleeping mat	1pc	500	▼-29%	725	▲ 45%
Mosquito net	1pc	400	▲ 14%	775	▲ 55%
Tooth paste	50g	120	0%	100	▲ 43%
Tissue paper	1pc	100	0%	30	0%
Bar soap	200g	50	0%	50	0%
Jerry can	1pc	150	0%	200	0%
Bucket	1pc	150	▼-25%	150	0%
Pads	1pc	100	0%	100	0%
Toothbrush	1pc	50	0%	30	0%
Underwear for girls	1pc	150	▲ 50%	200	▲ 300%
Underwear for female adults	1pc	200	▲ 33%	250	▲ 150%
Blanket	1pc	400	▲ 14%	350	▼-30%
Cooking energy items					
Firewood	1 bundle	150	▲ 50%	150	▲ 25%
Charcoal	2kg	200	▲ 60%	100	▼-50%
Matchbox	2pc	5	0%	5	0%

Items	Unit	Dadaab	Change	Kakuma	Change
Education items					
Shoes (< five years boys/girls)	1pair	750	▲ 67%	204	▼-63%
Shoes (5-12 years boys/girls)	1pair	1,000	▲ 67%	475	▼-39%
Uniform girls	1pair	1,500	▼-17%	850	▲ 70%
Uniform boys	1pair	1,200	▲ 9%	800	▲ 33%
Pencils	1pc	10	0%	10	0%
Pens	1pc	20	0%	20	▲ 100%
Exercise books	1pc	25	▲ 25%	35	▲ 75%
Rubbers	1pc	10	0%	10	▲ 33%
Socks	1pc	100	0	100	▲ 100%
School bag	1pc	600	▼-8%	600	▼-14%
Ruler	1pc	30	0%	30	▲ 50%
Geometric set	1pc	210	▲ 5%	200	▲ 33%
Sharpener	1pc	15	▲ 50%	10	0%
Kitchen Items					
Cooking pans	1pc	1,500	▲ 36%	450	▲ 29%
Knife	1pc	100	0%	100	0%
Spoon	1pc	20	▼-87%	20	0%
Cup	1pc	100	0%	50	▼-33%
Plate	1pc	100	▼-33%	100	0%
Construction items					
Hoop iron	1pc	240	0%	200	0%
Tower bolt (4 inches)	1pc	93	▼-7%	78	▲ 55%
Tower bolt (6 inches)	1pc	150	▲ 50%	180	▲ 88%
Pad bolt	1pc	125	*	150	0%
Butt hinge (2 inches)	1pc	50	0%	90	▲ 80%
Butt hinge (4 inches)	1pc	100	*	100	
Pine timber	1pc	70	▼-18%	50	▲ 25%
Nails (3 inches)	1pc	250	0%	200	0%
Nails (4 inches)	1pc	250	0%	200	0%
Roofing nails	1pc	260	▲ 4%	250	0%
Sealing nails	1pc	298	▲ 19%	250	0%
Wood preservative	1pc	300	▲ 400%	500	▼-50%
Eucalyptus	1pc	525	▲ 5%	100	▼-52%
Nails (2 inches)	1pc	250	0%	200	0%
Corrugated iron sheets	1pc	1,000	▼-23%	950	▲ 23%
Uncorrugated iron sheets	1pc	800	▲ 10%	750	*
Cement	1pc	1,000	▲ 11%	1,000	0%

* No price data collected as a result of unavailability of the respective commodity at the time of data collection to allow for comparison

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

Items	Wide availability (%KIs)	Limited availability (%KIs)	Remaining stock days	Time needed to restock in days
White maize	50%	45%	14	2
Maize flour	90%	10%	15	2
Wheat flour	94%	6%	14	3
Rice	95%	5%	20	2
Spaghetti	83%	17%	20	2
Beans	85%	15%	14	2
Cowpeas	14%	86%	12	2
Cowpeas leaves	0%	100%	NA	NA
Yellow split peas	50%	50%	13	2
Sugar	83%	17%	21	3
Vegetable oil	88%	12%	23	2
Salt	88%	12%	29	2
Cattle milk	42%	58%	1	1
Camel milk	68%	32%	1	1
Goat meat	67%	33%	1	1
Camel meat	62%	38%	1	1
Onions	72%	24%	5	2
Tomatoes	84%	16%	2	1
Kale	72%	20%	1	1
Sleeping mat	35%	65%	30	2
Mosquito net	58%	42%	25	2
Tooth paste	46%	53%	30	1
Tissue paper	65%	35%	30	5
Bar soap	100%	0%	20	4
Jerry can	89%	11%	28	3
Bucket	59%	41%	28	3
Pads	56%	44%	29	2
Toothbrush	47%	53%	25	1
Underwear for girls	56%	44%	21	2
Underwear for female adults	56%	44%	21	3
Blanket	60%	40%	28	3
Cooking pan	53%	47%	30	3
Knife	56%	44%	21	2
Spoon	56%	44%	28	3
Cup	56%	44%	30	3
Plate	53%	47%	28	2

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

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

Items	Wide availability (%KIs)	Limited availability (%KIs)	Remaining stock days	Time needed to restock in days
White maize	98%	0%	14	1
Maize flour	98%	2%	9	1
Wheat flour	93%	7%	13	1
Rice	87%	13%	7	1
Spaghetti	80%	16%	8	1
Beans	88%	12%	15	1
Cowpeas	86%	9%	8	1
Cowpeas leaves	100%	0%	1	1
Yellow split peas	78%	17%	10	1
Sugar	100%	0%	14	1
Vegetable oil	90%	10%	14	1
Salt	91%	8%	21	1
Cattle milk	79%	21%	7	*
Camel milk	81%	12%	3	1
Goat meat	81%	19%	1	1
Camel meat	84%	12%	1	2
Onions	91%	9%	7	1
Tomatoes	98%	2%	2	1
Kale	100%	0%	2	1
Sleeping mat	69%	26%	30	1
Mosquito net	89%	11%	18	1
Tooth paste	100%	0%	16	1
Tissue paper	78%	22%	15	1
Bar soap	100%	0%	14	1
Jerry can	50%	50%	14	1
Bucket	83%	17%	16	2
Pads	89%	8%	12	1
Toothbrush	100%	0%	14	1
Underwear for girls	89%	7%	14	2
Underwear for female adults	94%	0%	14	2
Blanket	84%	19%	14	3
Cooking pan	85%	15%	14	2
Knife	93%	7%	15	2
Spoon	95%	0%	17	2
Cup	89%	7%	20	2
Plate	88%	6%	16	2

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

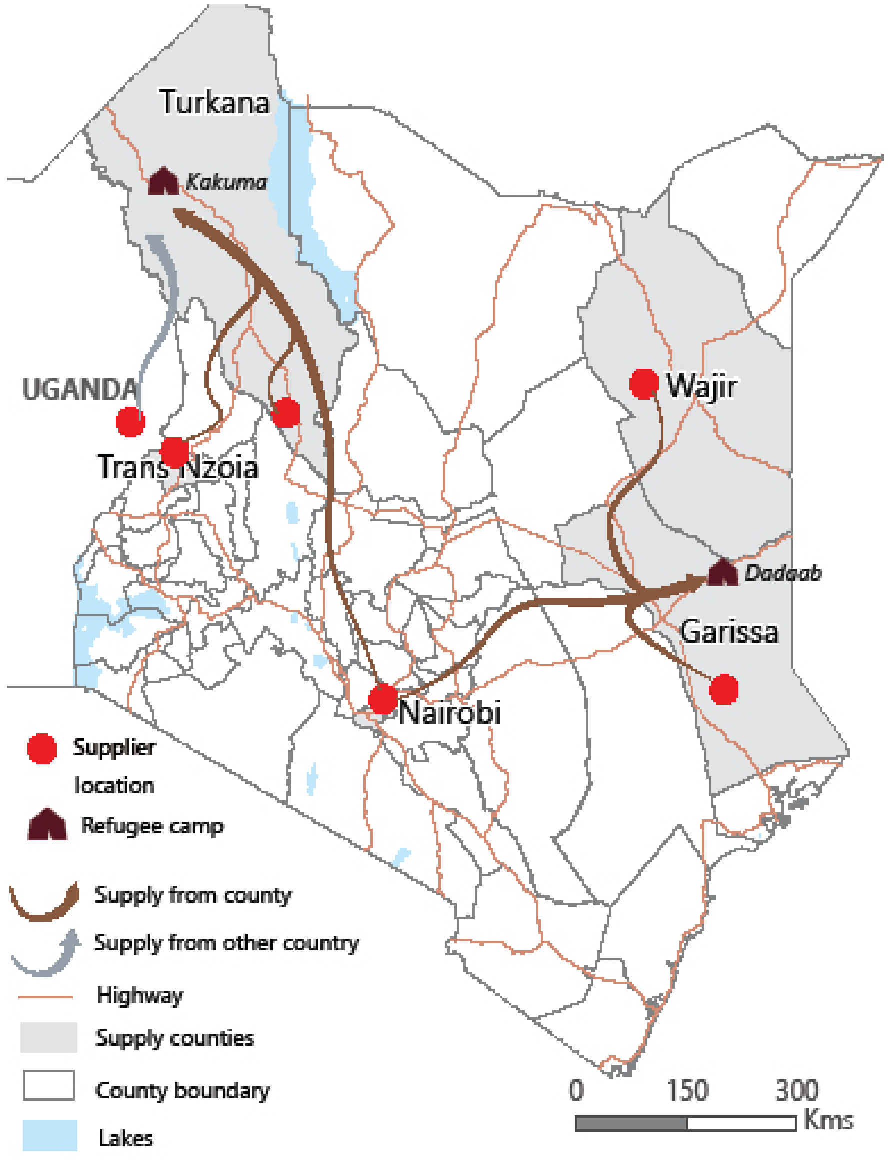
Items	Wide availability (%KIs)	Limited availability (%KIs)	Remaining stock days	Time needed to restock in days
Shoes (<five years boys/girls)	57%	43%	21	3
Shoes (5-12 years boys/girls)	57%	43%	21	3
Uniform girls	69%	31%	26	3
Uniform boys	75%	24%	21	2
Pencil	63%	38%	30	2
Pen	63%	38%	25	2
Exercise book	53%	47%	21	1
Rubber	47%	53%	30	2
Socks	65%	35%	21	1
School bag	59%	41%	25	2
Ruler	44%	56%	27	2
Geometric set	39%	61%	25	2
Sharpener	67%	33%	28	2
Firewood	62%	38%	10	1
Charcoal	8%	92%	13	2
Matchbox	80%	20%	28	1
Hoop iron	94%	0%	20	4
Tower bolt (4 inches)	88%	6%	20	4
Tower bolt (6 inches)	88%	6%	18	4
Pad bolt	81%	18%	18	4
Butt hinge (2 inches)	94%	5%	21	4
Butt hinge (4 inches)	100%	0%	22	3
Pine timber	79%	16%	25	4
Nails (3 inches)	66%	44%	20	4
Nails (4 inches)	89%	11%	21	3
Nails (2 Inches)	94%	5%	21	4
Roofing nails	84%	16%	21	4
Sealing nails	67%	33%	20	4
Wood preservative	52%	41%	20	4
Eucalyptus/ Blue gum	94%	6%	20	4
Corrugated iron sheet	79%	16%	20	4
Uncorrugated iron sheet	94%	6%	21	4
Cement	89%	11%	21	4

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

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

Items	Wide availability (%KIs)	Limited availability (%KIs)	Remaining stock days	Time needed to restock in days
Shoes (<five years boys/girls)	89%	6%	14	2
Shoes (5-12 years boys/girls)	89%	11%	15	2
Uniform girls	92%	7%	18	1
Uniform boys	94%	6%	14	1
Pencil	100%	0%	30	1
Pen	100%	0%	22	1
Exercise book	93%	7%	30	1
Rubber	93%	7%	27	1
Socks	92%	8%	19	2
School bag	90%	10%	21	1
Ruler	95%	5%	27	1
Geometric set	100%	0%	20	1
Sharpener	96%	4%	20	1
Firewood	89%	11%	6	1
Charcoal	89%	9%	6	1
Matchbox	100%	0%	11	1
Hoop iron	92%	0%	16	2
Tower bolt (4 inches)	89%	11%	13	2
Tower bolt (6 inches)	94%	6%	12	2
Pad bolt	87%	13%	12	1
Butt hinge (2 inches)	94%	6%	11	2
Butt hinge (4 inches)	95%	5%	10	2
Pine timber	94%	6%	15	2
Nails (3 inches)	95%	5%	14	2
Nails (4 inches)	96%	5%	14	2
Nails (2 Inches)	75%	25%	14	2
Roofing nails	96%	4%	12	2
Sealing nails	86%	14%	14	2
Wood preservative	81%	18%	14	3
Eucalyptus/ blue gum	82%	18%	1	2
Corrugated iron sheet	93%	7%	14	2
Uncorrugated iron sheet	92%	8%	10	1
Cement	92%	8%	14	2

MAIN SUPPLY ROUTES



LOCATION OF THE MAIN SUPPLIER FOR FOOD AND NON-FOOD ITEMS

At the time of data collection, more than three quarters of the vendors sourced their goods within the sub-counties of their residence or the neighboring sub counties. In particular, vendors in Dadaab primarily relied on Dadaab and Garissa Sub Counties for their goods, while Kakuma vendors depended on Turkana West Sub County.

Proportion of vendors reporting on the location (county) of their main supplier at the time of data collection:

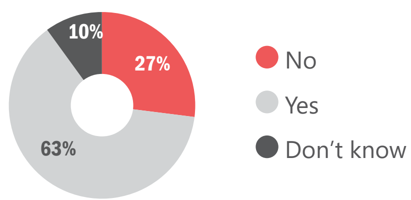
	Dadaab		Kakuma	
1	86%	Garissa	76%	Turkana
2	19%	Nairobi	20%	Nairobi
3	2%	Wajir	11%	Trans-Nzoia

REPORTED PREDICTED CHANGES IN SUPPLIER'S PRICES

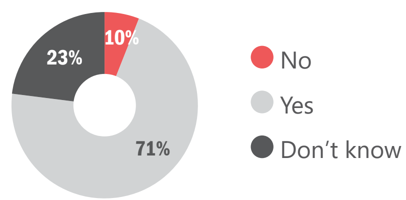
The data indicates that a significant proportion of the vendors in both Dadaab (63%) and Kakuma (71%) reported that they could predict changes in supplier prices one month after data collection. The majority (83%) expected prices to rise, possibly due to market accessibility issues and high transportation costs as a result of the heavy rains. These differs with Q3 findings where the majority (Dadaab 72%, Kakuma 63%) reported not being able to predict changes in supplier prices. Various factors contribute to change in prices, including challenges in supply of commodities, transport cost, input cost, and weather conditions among other factors. These factors might have contributed to the higher proportion of vendors predicting an increase in prices since the data was collected during a rainy season and vendors were experiencing transport challenges. A considerable proportion of the vendors (Dadaab 27%, Kakuma 10%) reported that they were not in a position to predict change in prices due to fluctuation of prices and unavailability of commodities in the market.

Proportion of vendors reporting on their ability to predict changes in supplier's prices for popular commodities in the one month after data collection, per camp:

Dadaab



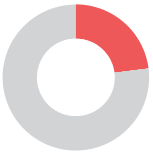
Kakuma



SUPPLIER

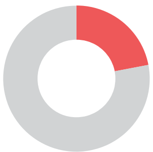
Dadaab

Proportion of vendors depending on one supplier for food items.



23%

Proportion of vendors depending on one supplier for non-food items.



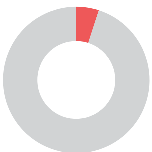
22%

Kakuma

Proportion of vendors depending on one supplier for food items.

8%

Proportion of vendors depending on one supplier for non-food items.



5%

The heavy rains and floods in Garissa County may have disrupted the transport system and delivery of commodities. This disruption is reflected in the increase in the proportion of vendors relying on a single supplier, rising from 11% in Q3 to 23% in Q4. Nearly one third of the vendors (31%) in Dadaab reported changing their supplier to deal with the shortage of commodities.

ACCESS TO A LOCKED, SECURED STORAGE FACILITY

The majority of vendors (92% Dadaab, 78% Kakuma) had access to a locked secured storage facility within the market place. Of the remaining vendors without a storage facility, 6% in Kakuma and 3% in Dadaab reported complete lack of a storage facility.

Proportion of vendors reporting on access to a locked, secured storage facility in the 3 months prior to data collection, per camp:

Dadaab

80%	Yes, within my own business facilities
12%	Yes, elsewhere within the market place
3%	No storage facility
3%	No, I store goods at my home
1%	No, I store goods at another facility outside this market place

Kakuma

72%	Yes, within my own business facilities
6%	Yes, elsewhere within the market place
11%	No, I store goods at my home
6%	No storage facility
4%	No, I store goods at another facility outside this market place

VENDOR CHALLENGES

Most reported challenges by vendors in the 3 months prior to data collection, per camp:[7]

Dadaab

1. 58% Market inaccessible due to floods
2. 39% Price increase by the supplier
3. 30% Customer reduction
4. 24% Infrastructure damage

Kakuma

1. 66% Lack of funds to restock
2. 48% Price increase by the supplier
3. 20% Customer reduction
4. 9% Shortage of supply

% 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 (66% Dadaab, 68% Kakuma) who reported a change:[7]

Dadaab	47% ▲	53% ▼
Kakuma	70% ▲	30% ▼

A higher proportion of vendors in Dadaab (53%) than Kakuma (30%) reported a decrease in the number of customers purchasing from the shops. The main causes as perceived by the vendors include, markets being inaccessible due to the floods, lack of transport options and damaged roads while in Kakuma, the main reported reason was restricted movement.

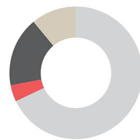
CHANGE IN THE NUMBER OF VENDORS

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

Dadaab

56%	Increased
16%	Decreased
16%	Stayed the same
12%	Don't know

Kakuma



68%	Increased
4%	Decreased
17%	Stayed the same
11%	Don't know

% 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 who reported a decrease (4% Kakuma, 16% Dadaab):

Dadaab

Very few (1%-10%)	28%
Few (11%-25%)	56%
Some (26%-50%)	17%

Kakuma

Very few (1%-10%)	75%
Few (11%-25%)	13%
Some (26%-50%)	12%

DIFFICULTY IN KEEPING THE BUSINESS OPERATIONAL AND WELL-STOCKED

In the last quarter of the year, Garissa was significantly affected by heavy rains and floods, leading to a higher proportion of vendors (22%) reporting difficulties in keeping their businesses well-stocked. This may be attributed to the higher proportion of vendors (68%) in Dadaab who reported unusable roads as the main challenge faced when transporting commodities unlike in Q3 where only 3% reported that the roads were impassable. In Dadaab, nearly three-quarters (70%) of vendors reported that they did not experience any challenges in keeping their businesses operational and well-stocked in the three months before data collection, whereas in Kakuma, this figure was 58%.

Reported difficulty in keeping the business operational and well-stocked by vendors in the 3 months prior to data collection:[8]

Dadaab

70%	No difficulty
22%	Difficulties with prices charged by suppliers
20%	Flooding in the marketplace
11%	Difficulties with availability of core items

Kakuma

58%	No difficulty
32%	Difficulties with prices charged by suppliers
9%	Difficulties with availability of core items.
9%	Difficulties in staffing*

SHORTAGE OF COMMODITIES:[8]

Nearly half of the vendors (47%) reported shortages of commodities in the three months preceding data collection. This marks a significant reduction compared to Q3 when 81% of vendors reported facing shortages. However, consistent with Q3, the most reported causes of shortages in both camps were increased market prices, and high transportation costs. In Dadaab, over one-third of vendors (36%) reported inaccessible roads as a contributing factor to the shortages.

Most reported causes of shortage of commodities by vendors in the 3 months prior to data collection, per camp:[7]

Dadaab

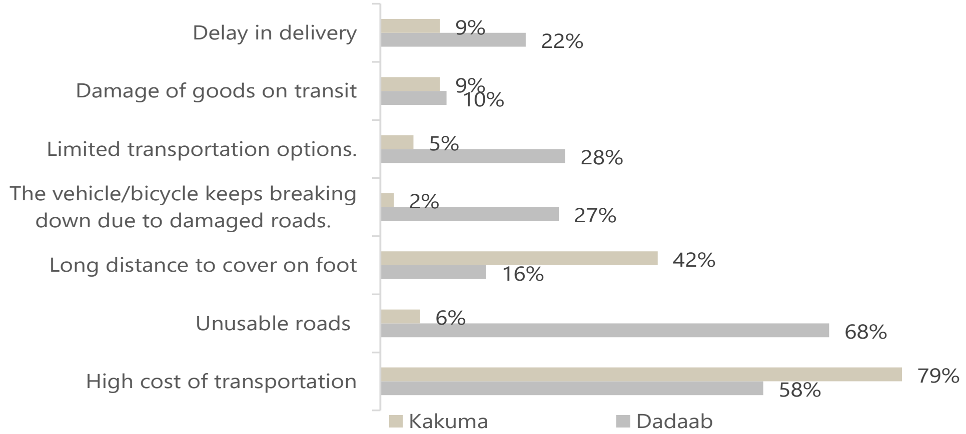
Increased market price	41%
Inaccessible roads	36%
High cost of transportation	24%

Kakuma

Increased market price	26%
High transportation cost	23%
Low demand for the commodities	11%

CHALLENGES FACED WHEN TRANSPORTING COMMODITIES:[8]

Most reported transportation challenges by vendors in the 3 months prior to data collection, per camp: (n=276)

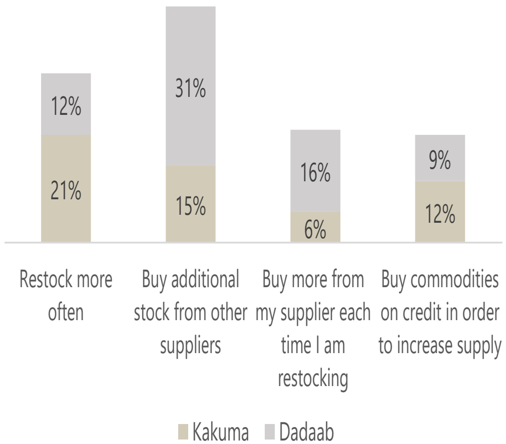


Similar to Q3, the high cost of transport was reported as a challenge in both camps. This is likely influenced by the cost of fuel which is still high. The transport index has increased by 11.7% in the last 12 months (December 2022 - December 2023).[7] A higher proportion of vendors in Dadaab than Kakuma cited unusable roads and vehicle/bicycle breakdowns, possibly linked to heavy rains and flooding in the county. This contrasts with Q3 when only 3% of vendors reported inaccessible roads.

COPING MECHANISMS EMPLOYED TO DEAL WITH SHORTAGE OF COMMODITIES:[8]

Vendors facing commodity shortage in the 3 months prior to data collection (47%) employed various coping strategies. In Dadaab, nearly one third of the vendors (31%) changed their suppliers. This may be attributed to the challenge of inaccessible roads in Dadaab, leading vendors to seek commodities from more accessible suppliers. While in Kakuma, the most common coping mechanism was to restock more often as reported by vendors (21%). The increased demand might have resulted to the increase of market price as reported by 41% of the vendors in Dadaab compared to 26% in Kakuma.

Most reported strategies employed by interviewed vendors to address unavailability of commodities at the time of data collection, by % of vendors (47%) who reported experiencing shortage of some commodities per camp:[6]



* Difficulty in staffing implies that the vendor had a difficult time getting or sustaining his/her employees.

ACCESS TO MARKETPLACES

Physical access to marketplaces

Accessibility to the markets appears to have deteriorated as there was an increase in the proportion of vendors (32%) reporting facing physical challenges when accessing the market place in the 3 months prior to data collection contrary to Q3 (13%). The reduction in proportion can be associated with the heavy rains and floods that were experienced in both locations.

In Dadaab, the main reported problems were market inaccessibility (23%), limited transport options (19%), and damaged roads (16%). Garissa County was significantly affected by heavy rains in the last quarter of 2023, leading to the destruction of infrastructure and constraining both market operations and access. In Kakuma, restricted movement (17%), inadequate facilities (8%) and market place operating only at limited times (7%) were commonly reported marketplace access problems by vendors.

Most reported physical challenges to accessing the marketplace by vendors in the 3 months prior to data collection, per camp:

Dadaab

1. 68% No issue with physically accessing the market place
2. 23% Market inaccessible due to flooding
3. 19% Limited transport options.

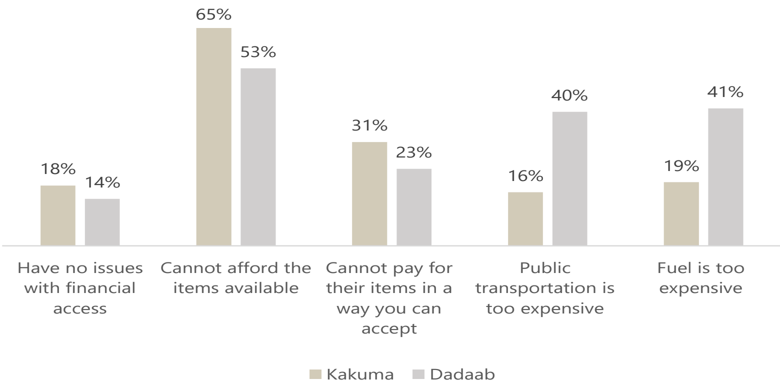
Kakuma

1. 68% No issue with physically accessing the market place
2. 16% Curfew/ restricted movement
3. 8% Inadequate facilities

Financial barriers to accessing marketplaces

A significant proportion (86% Dadaab, 82% Kakuma) of customers encountered financial difficulties related to accessing the business and paying for the goods as perceived by the assessed vendors (n=260). Notably, 65% of the vendors in Kakuma reported that customers were unable to afford the available items, while 31% of the vendors cited that customers faced challenges in paying for their purchases using acceptable payment methods, such as cash or mobile money. In Dadaab, a comparatively lower proportion of vendors reported that their customers faced financial challenges. The issue of affordability was also reported by 53% of the assessed vendors. Furthermore, a significant percentage of vendors, 40%, reported that public transportation costs and fuel expenses (41%) were reported as limiting factors to accessing marketplaces.

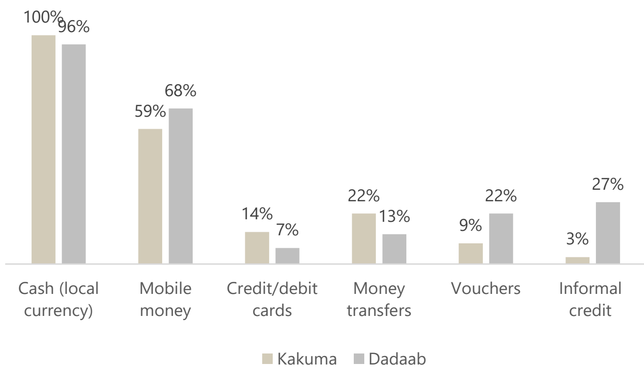
Most reported financial barriers to accessing the marketplace by customers as perceived by vendors in the 3 months prior to data collection, per camp:[5]



PAYMENT MODALITIES:[8]

Similar to Q3 findings, the majority of vendors in both camps used cash and mobile money for payment of commodities. In Dadaab, informal credit (27%) and vouchers (22%) were also used as payment modality by a significant proportion of customers.

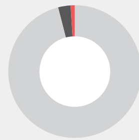
Most commonly reported acceptable payment modalities, per camp: [5]



Social barriers to accessing the marketplaces

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

Dadaab

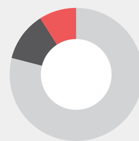


96% No group had difficulty

3% Don't know

1% Yes

Kakuma



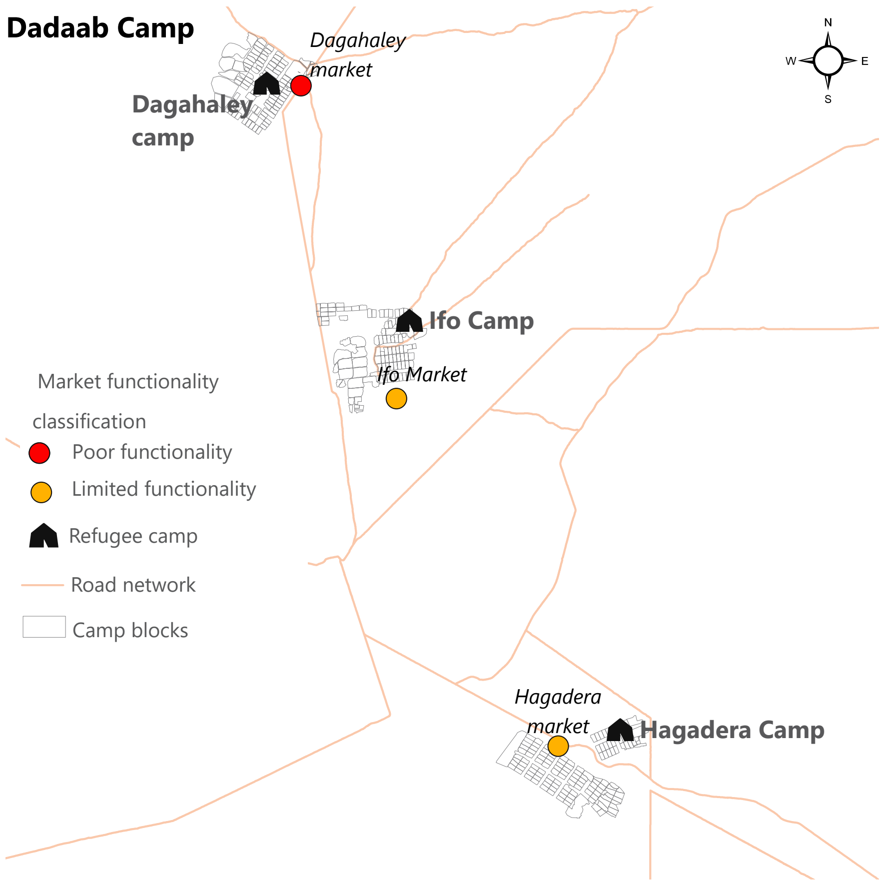
79% No group had difficulty

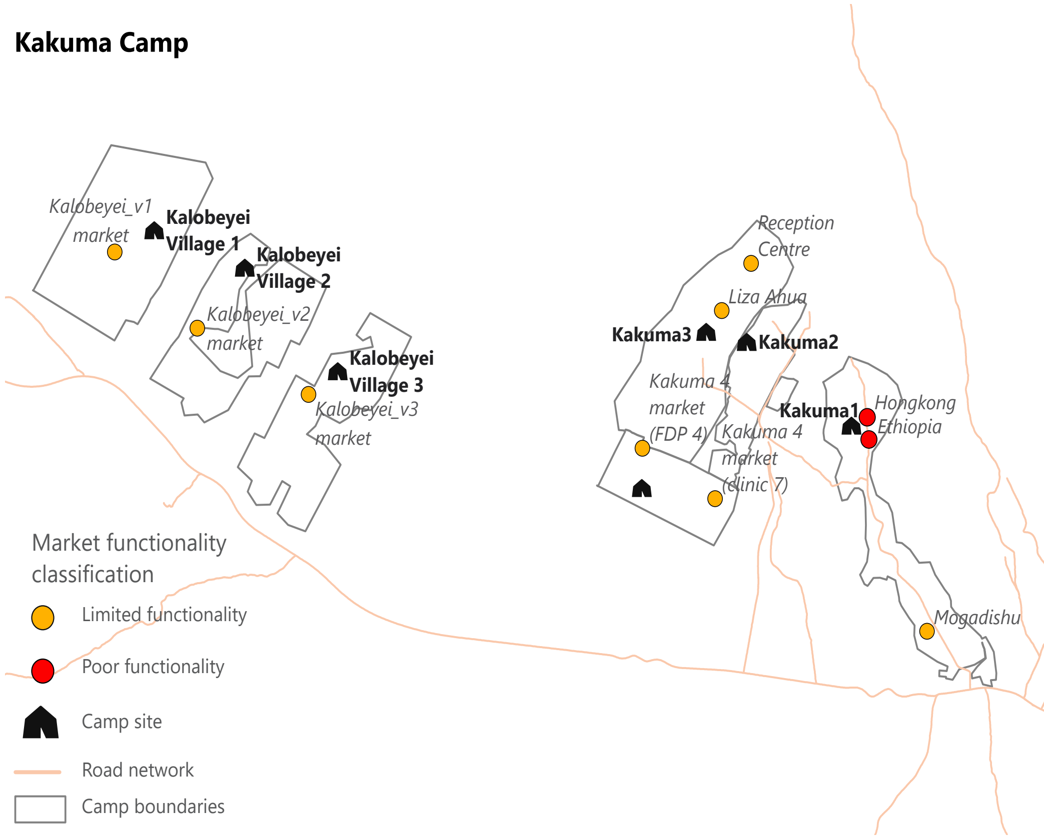
12% Don't know

9% Yes

Most of the assessed vendors (96% in Dadaab and 79% Kakuma) reported that the majority of the groups of people did not face any discrimination, exclusion or feel unwelcome visiting the assessed markets. These findings were consistent with Q3 in Dadaab. However, in Kakuma, there was 16% point reduction in the proportion of vendors who reported that some groups of people avoided the market place. The most commonly reported reasons in Kakuma include curfews (13%), fear of robbery (10%) and fear of violence (7%).

MARKET FUNCTIONALITY SCORE (MFS), BY CAMP





Market functionality, as an extension of the JMMI, is a recurring assessment process. The Market Functionality Score (MFS)[10] assesses markets across five key dimensions: accessibility, availability, affordability, resilience, and infrastructure. The markets are categorized into "full functionality", "reduced functionality", "limited functionality", or "poor functionality" based on the MFS score.

Out of the 13 single markets assessed, 10 were classified as having limited functionality (IFO and Hagadera in Dadaab and Kakuma 4- FDP 4 & clinic 7, Kalobeyei village 1,2,&3, Liza Ahua, Mogadishu, and Reception Centre market in Kakuma). Three markets were found to have poor functionality (Dagahaley in Dadaab and Ethopia and Hongkong markets in Kakuma).

In comparison to Q3, Dagahaley dropped from limited functionality to poor functionality in Dadaab camp. The floods heavily impacted Dagahaley camp, affecting market access and the overall resilience. Vendors reported challenges in transportation and restocking of commodities. In Kakuma, Kalobeyei Village 1, Village 2 and Village 3 markets, improved from poor functionality to limited classification while Ethiopia and Hongkong dropped from limited functionality to poor functionality. Affordability and availability are the main poor performing attributes in Kakuma. Affordability is informed by the customers' ability to afford core items and the ability to predict the cost in future while availability is based on the ability of vendors to provide all core items.

Methodology

The JMMI is conducted jointly with KCWG partners. The geographic coverage is 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 interviews with vendors (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 Kobo collect mobile application and was uploaded to a secure 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, 310 vendors were interviewed as key informants (194 from Kakuma and 116 from Dadaab). At least three prices per item in each of the camps were collected for a total of 67 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 the 11th and 19th December 2023 across 13 markets in the camps.

REACH 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 camp 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 for the time frame within which it was collected.
- For some questions, vendors were asked 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 requests the cheapest available type of each item to be recorded, as availability varies across the camps, price comparisons across the camps may be based on slightly varying products.
- Some vendors lacked weighing scales and owing to this, an estimation of how much forms a kilogram was done. This was for commodities such as vegetables, onions, and tomatoes. In some cases, the estimation may differ.
- 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.
- The quality of some of the assessed items differed, hence the high price variations e.g. kitchen ware.

Endnotes

[1] Department of refugee services, November 2023.

[2] Kenya News Agency, Floods havoc in Garissa, November 2023.

[3] ASAL humanitarian network, Floods escalate in ASALs Kenya, November 2023.

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

[5] USD-156.1 KES in December 2023.

[6] Change since the last round of JMMI data collection in September 2023 (Q3)

[7] KNBS, December 2023 inflation rate.

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

[9] The Refugee MEB computation excludes non-recurring expenditures, such as kitchenware, shelter components, some WASH items (i.e., sleeping mats, inner wear, blankets, mosquito nets, water, and water storage containers), education items (i.e., textbooks, geometrical sets, uniform, school bag, and school shoes). and water.

[10] Market functionality score 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; accessibility, availability, affordability, resilience, and infrastructure.

Participating agencies