

Ethiopia | Joint Market Monitoring Initiative (JMMI)

07 - 17 October, 2024

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 October round was collected using key informant interviews (KIIs) conducted in woreda capitals between October 7th and 17th, 2024. A minimum of three vendors were interviewed for each assessed commodity in each woreda. For commodity prices and stock levels, the median prices/stock levels are calculated for each item within each assessed woreda. The national and regional median prices are aggregated results of the woreda median prices.

KEY INDICATORS

Median Cost of JMMI Full Basket

12,217.58 ETB
115.20 USD¹
0%

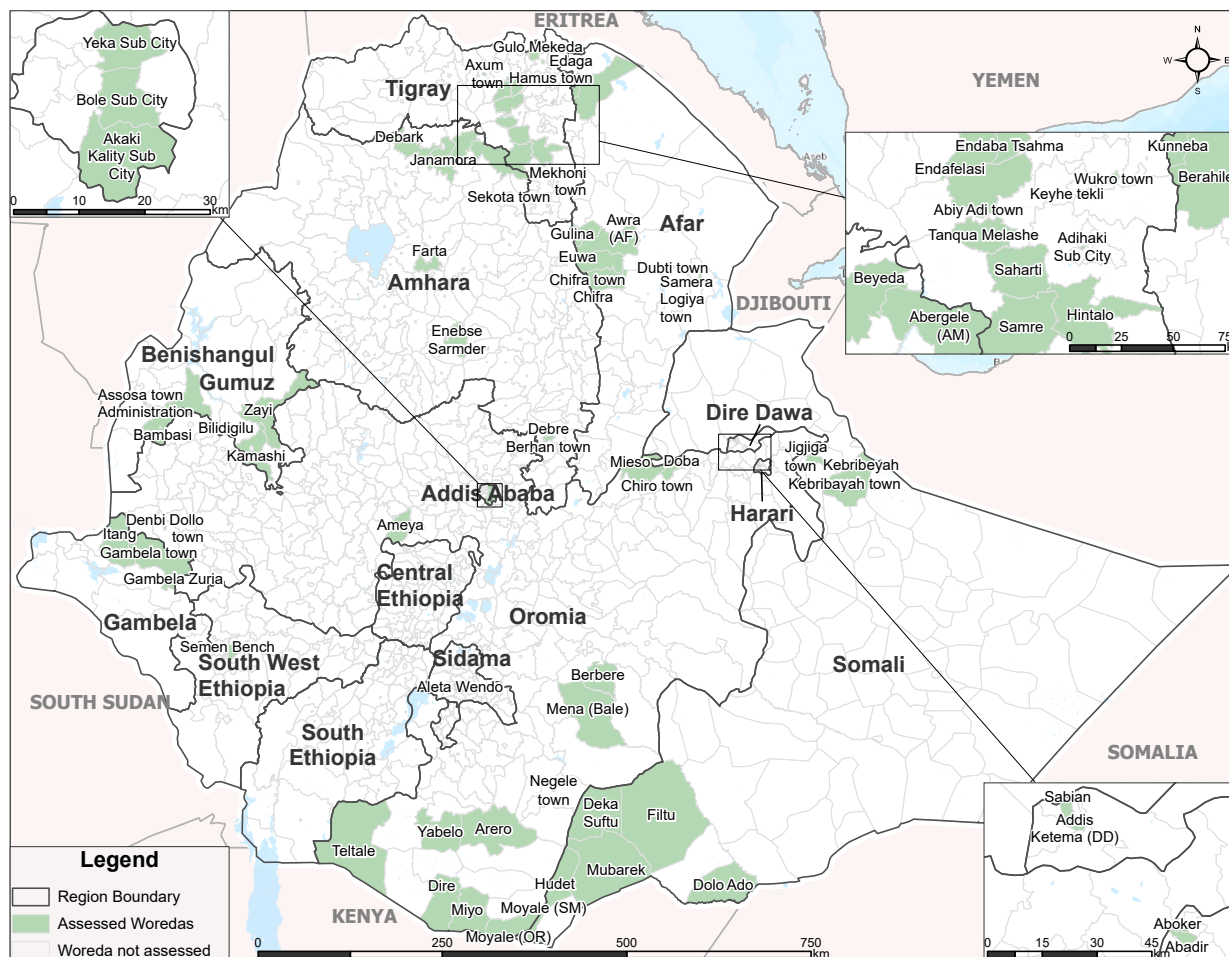
Median Cost of JMMI Food Basket

11,686.58 ETB
110.20 USD¹
0%

Median Cost of NFI Basket

531 ETB
5.01 USD¹
0%

Map 1: Assessed Marketplaces, By Woreda



MARKET OVERVIEW

Key Messages

- Despite regional price fluctuations, **the national JMMI basket prices remained stable** in October 2024.
- In October 2024, while most monitored commodities prices remained stable or declined, some **items such as rulers (+50%), rice (+20%), camel meat (+13%), and garden peas (+11%) experienced price increases**. The increase in rulers and rice prices could be attributed to supply chain disruptions and the impact of the rising exchange rate on imported goods. The increases in camel meat and garden peas prices are likely due to seasonal variations, supply chain disruptions, and transportation challenges.
- In October 2024, a significant number of assessed markets experienced severe (36%) and poor (55%) functionality. This marked a notable **increase in severe market issues compared to September 2024 (29%)**. The highest rate of markets with severe functionality issues was observed in Amhara, Oromia and Tigray, with 63%, 50%, and 40% of assessed markets, respectively. Availability and resilience issues were the primary contributors to these challenges, potentially stemming from limited access to finance and insufficient production to meet demand. These market constraints have direct implications for CVA implementation.

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

Market Functionality Score (MFS)

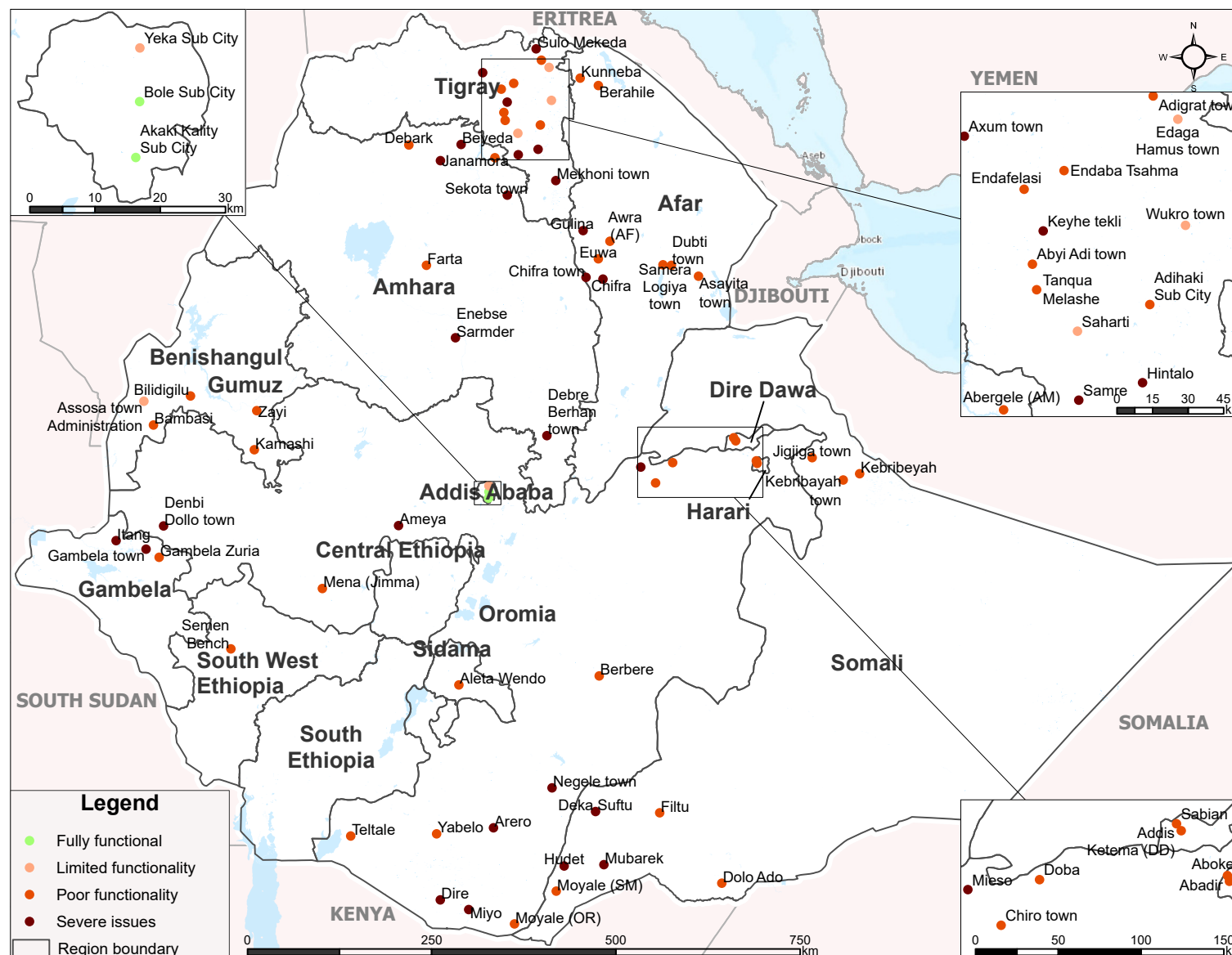
The Market Functionality Score (MFS) is a method of classifying markets based on their level of functionality, helping aid actors understand which markets function well enough to support cash and voucher assistance (CVA) and which may require alternative interventions. The MFS is divided into five dimensions:

- **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 October 2024, a significant proportion of assessed markets faced severe (36%) and poor (55%) functionality issues. Markets with severe market functionality issues represent a notable increase since September 2024, when 29% of markets reported this issue.
- In October, Amhara (63%), Oromia (50%), and Tigray (40%) reported the highest rates of markets with severe functionality issues. These regions also had the highest rates of severe market issues in September 2024, at 38%, 58%, and 29%, respectively. Market functionality has been consistently deteriorating in these regions since July 2024.
- 97% of the market places assessed in October reported availability issues. The same rate was reported in September 2024.
- In October 2024, resilience issues were observed in 84% of assessed markets, the situation was particularly severe in Afar, Benishangul Gumuz, Dire Dawa, Harari, Oromia, Sidama, Somali, and South West Ethiopia where 100% of markets faced these issues.

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



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 2020³, it is not a complete MEB itself and does not reflect the full spectrum of regular household expenditures in Ethiopia. It can, however, be tracked over time to understand how household financial burdens are evolving.

Food Items

Cereals & root crops (maize, sorghum, wheat, teff, Barley, rice & enset)	72 kg	Tomatoes	5 kg
Meat	2.7 kg	Potatoes	3 kg
Green leafy vegetables	5 kg	Onions	5 kg
		Egg	18 pieces
		Cooking oil	5.86 L

Non-Food Items

Bath soap	0.375 kg (3* 125g bars)
Laundry soap	1.2 kg (6* 200g bars)

USD/ETB official exchange rate⁴

116.423 ETB

Food basket composition according to regional consumption patterns:

Beef	Addis Ababa, Amhara, Benishangul Gumuz, Gambela, Oromia, South Ethiopia, Harari, Dire Dawa, Sidama, SWE ⁵
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

ACCEPTED PAYMENT MODALITIES

Proportion of vendors reporting accepting different types of payment in the 30 days prior to data collection⁶:

- 1

99%

Cash (ETB)
- 2

22%

Mobile transfer
- 3

15%

Mobile money

Table 1: JMMI Full Basket Median Price Per Region

Region	Full basket median price in Oct (ETB)	Full basket median price in Oct (USD)	Full basket median price in Sep (ETB)	Full basket median price in Sep (USD)	Change since Sep 2024
Addis Ababa	12,472.37	117.61			
Afar	11,194.14	105.55	11,607.24	109.45	▼ 4%
Amhara	11,216.32	105.76	10,983.47	103.57	▲ 2%
Benishangul Gumuz	10,504.86	99.05	10,762.37	101.48	▼ 2%
Dire Dawa	11,082.20	104.50	11,540.00	108.81	▼ 4%
Gambela	13,095.33	123.48	13,755.29	129.70	▼ 5%
Harari	10,262.43	96.77	10,291.22	97.04	0%
Oromia	9,969.72	94.01	9630.45	90.81	▲ 4%
Sidama	11,749.16	110.79	11,520.26	108.63	▲ 2%
South Ethiopia					
Somali	14,086.41	132.83	11,517.97	108.61	▲ 22%
SWE	11,217.77	105.78	10,950.61	103.26	▲ 2%
Tigray	11,020.50	103.92	11,368.81	107.20	▼ 3%
JMMI full basket	12,217.58 ETB		115.20 USD ¹		0%
JMMI food basket	11,686.58 ETB		110.20 USD ¹		0%

Key Findings

- In October, no change was observed on both the national full and food baskets since September 2024.
- In October, 5 of the 12 assessed regions experienced JMMI full basket median price increase.
- In October, the highest JMMI full basket median price increase was observed in Somali (+22%) compared to the regional median price in September 2024.
- Compared to the price in October 2023, the national JMMI full basket median price increased by 20%.

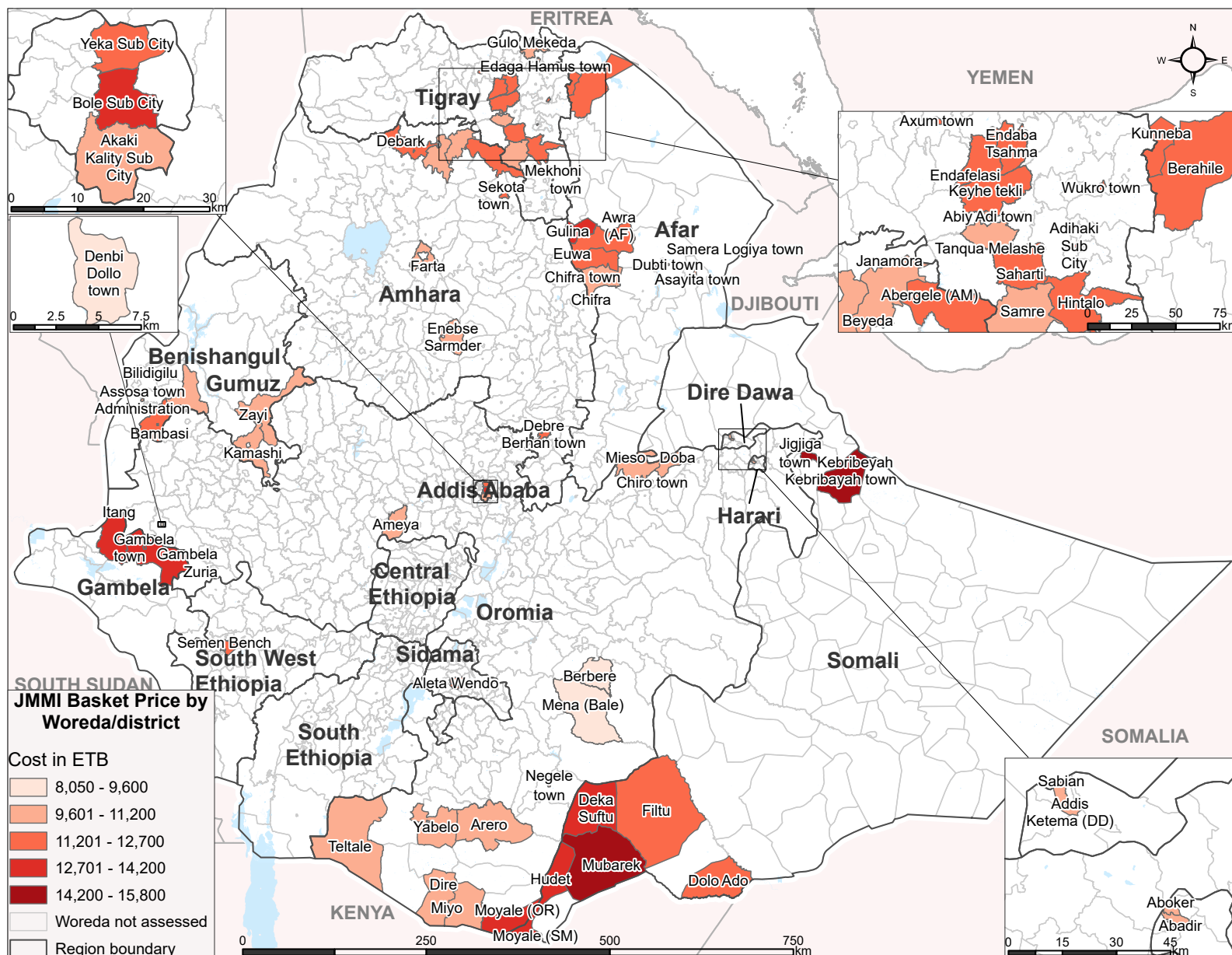
3. Minimum Expenditure Basket for Somali Region Guidance Note, June 2020. Additional sources consulted to assemble the JMMI Basket include the Ethiopia Food Security and Water, Sanitation and Hygiene (WASH) sectors, World Food Programme (WFP) vulnerability analysis and mapping (VAM), and publications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

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

5. South West Ethiopia.

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

Map 3: Cost of JMMI Full Basket, By Woreda



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 October, a 20% rise was reported in rice prices despite a decline and stability in other cereal items prices since September 2024.
- Prices of all pulses saw rises between September and October 2024, with increases of 11%, 9%, and 6%, respectively.
- In October 2024, camel meat prices increased by 13%.
- In October 2024, onions and okra prices increased by, 7%, each.
- Among educational items, rulers experienced a significant price increase of 50% since September 2024.

Table 2: National and Regional Median Prices Per Item⁷

Item ⁸	National change since Sep 2024	National	Addis Ababa	Afar	Amhara	Benishangul Gumuz	Dire Dawa	Gambela	Harari	Oromia	Sidama	South Ethiopia	Somali	SWE	Tigray
Cereals⁹															
Maize	0	45	60	45	45	38	51.25	51.25	NA	37.5	42.5	NA	62.5	35	40
Sorghum	▼ 2%	58.75	95	55	55	35.5	85	56.25	NA	47.5			80	30	60
Teff	0	130	145	132.5	120	155	141.25	142.5	NA	120	120	NA		135	132
Wheat	0	75	90		75	99.5	78.75	137.5	NA	59		NA	96.25	120	60
Barley	0	100		100							92.5				
Enset	▼ 13%	87.5									87.5	NA			
Rice	▲ 20%	145											145		
Pulses															
Garden peas	▲ 11%	130	140	NA	120	125	NA	125	NA	100	NA	NA	70	80	140.22
Faba beans	▲ 9%	120	130	NA	115	92.5	NA	115	NA	110	NA	NA	163.75	80	147
Lentils	▲ 6%	170	170	200	142.5	167.5	NA	195	NA	200	NA	NA	175	160	150
Meat and Fish															
Beef ⁹	0	800	900		770	500	800	900	600	800	800	NA		600	800
Goat meat ⁹	▼ 25%	600		600									1100		
Camel meat ⁹	▲ 13%	900											900		
Dry fish	▲ 2%	290						290							
Vegetables															
Green leafy ⁹	▼ 17%	50	30	65	52.5	46.25	NA	45	NA	37.5	47.5	NA	80	30	54.55
Tomatoes ⁹	▼ 3%	97.5	60	100	125	62.5	100	90	80	81.25	80	NA	100	40	90
Onions ⁹	▲ 7%	138.75	100	140	160	100	135	130	110	121.25	120	NA	140	140	140
Potatoes ⁹	0	50	30	65	56.25	50	40	50	30	40	35	NA	47.5	40	50
Okra	▲ 7%	75						75							
WASH															
Bath soap ⁹	▼ 1%	57	50	50	65	63.75	40	80	35	52.5	60	NA	90	50	59.5
Laundry soap ⁹	0	60	52.5	50	60	53.75	60	80	55	50	55	NA	70	60	60
Sanitary pads	0	60	55	60	60	70	NA	70	NA	60	60	NA	110	60	60
Water purification	▼ 20%	30	20	30	20	40	NA	35	NA	10.5	NA	NA	70	15	30
Shelter															
Plastic bucket	▼ 20%	200	200	230	170	265	NA	250	NA	120	NA	NA	375	150	180
Washing basin	▼ 15%	213.75	250	275	150	262.5	NA	200	NA	145	NA	NA	325	120	200
Education															
Exercise book	▼ 4%	60	50	70	60	62.5	NA	70	NA	54	NA	NA	80	40	50
Pen/pencil	0	20	20	25	22.5	20	NA	20	NA	25	NA	NA	25	30	15
Rubbers	0	15	10	15	10	22.5	NA	20	NA	6.5	NA	NA	20	15	10
Rulers	▲ 50%	37.5	35	15	70	27.5	NA	40	NA	25	NA	NA	50	15	20
Other															
Cooking oil ⁹	0	240	240	200	250	255	220	230	230	214	270	NA	300	240	250
Milk	▼ 8%	90	90	NA	60	100	NA	120	NA	67.5	NA	NA	197.5	100	90
Eggs ⁹	0	15	14	16	11	15	16	20	14	11.25	12	NA	22.5	12	16
Salt	▼ 11%	31.25	32.5	30	30	60	NA	42.5	NA	32.5	NA	NA	30	30	30

7. The blank spaces represent item that are not part of the basket in that region.

8. The 'NA' means data for certain items prices is not available for this month.

9. These items are included in the JMMI basket. The remaining items are monitored monthly, but not included in the basket.

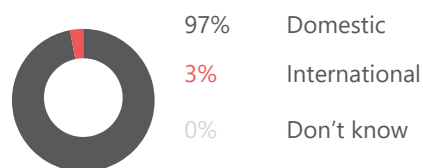
10. In September 2024, prices for pulses were not collected in Dire Dawa, Harari and Sidama. Similarly, green leafy vegetables, milk, salt, sanitary pads, water treatment, education and shelter items prices were not collected in Dire Dawa, Harari, Sidama and South Ethiopia, which could have likely affected the monthly price change reported in Table 1 and Table 2.

SUPPLY CHAIN AND MARKET ACCESSIBILITY

LOCATION OF MAIN SUPPLIERS FOR FOOD ITEMS

62% of vendors reported that their main supplier of food items was located in the same woreda.

Original location of suppliers, by % of suppliers whose main food items suppliers were outside the woreda:



38% of vendors reported that their main supplier of food items was not located in the same woreda as them.

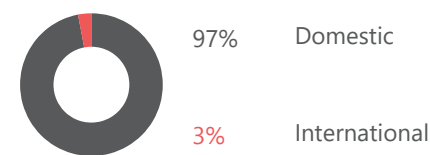
Location of suppliers, by % of vendors whose main food items suppliers were outside the woreda⁶:

27%	Tigray
24%	Oromia
20%	Amhara
8%	Gambella
6%	Addis Ababa

LOCATION OF MAIN SUPPLIERS FOR NON-FOOD ITEMS

48% of vendors reported that their main supplier of NFIs was located in the same woreda.

Original location of suppliers, by % of suppliers whose main NFI suppliers were outside the woreda:



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

Location of suppliers, by % of vendors whose main NFI suppliers were outside the woreda⁶:

28%	Tigray
16%	Gambella
14%	Oromia
13%	Amhara
13%	Addis Ababa

DIFFICULTIES IN MEETING DEMAND AND TRANSPORTING OR PROCURING SUPPLIES

30% (n= 109) of food items vendors reported having faced difficulties obtaining enough food items to meet demand in the 30 days prior to data collection.

The three most frequently cited reasons for shortage of food items supply were⁶:

- 1 54% (n=59) Not enough money
- 2 34% (n= 37) Producers producing less
- 3 33% (n= 36) Not enough credit

23% (n= 29) of NFI vendors reported having faced difficulties obtaining enough NFIs to meet demand in the 30 days prior to data collection.

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)⁶:

- 1 5% Women
- 2 5% Children
- 3 2% 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.

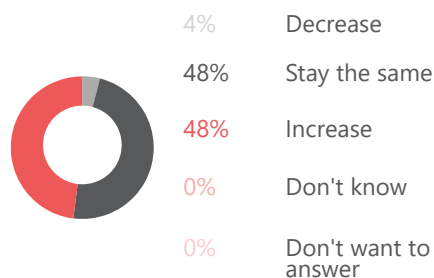
- 1 10% Fear of violence
- 2 10% Curfew
- 3 9% Fear of robbery
- 4 8% Fear of looting

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

VENDOR AND CUSTOMER DYNAMICS AND PREDICTED PRICE CHANGES

REPORTED PREDICTED CHANGE IN PRICE OF FOOD ITEMS

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

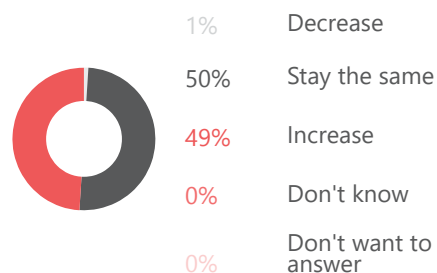


Out of those vendors predicting an increase in food prices, the most frequently cited reasons were⁶:

- 1 78% Rising exchange rate
- 2 32% Customers running out of these items
- 3 15% Instability

REPORTED PREDICTED CHANGE IN PRICE OF NON-FOOD ITEMS

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

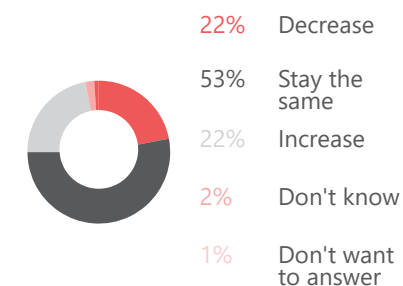


Out of those vendors predicting an increase in non-food item prices, the most frequently cited reasons were⁶:

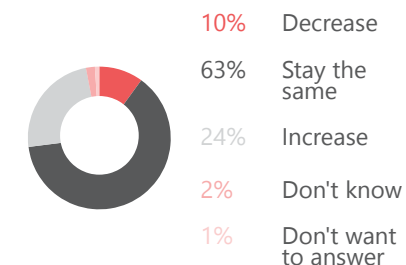
- 1 85% Rising exchange rate
- 2 22% Customers running out of these items
- 3 12% Instability

CHANGE IN NUMBER OF CUSTOMERS AND VENDORS

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



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



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

Table 3: Availability of Items in the Market, Available Stock and Time Needed to Restock in October 2024¹¹

Item	Availability			Stock and Restock	
	Available (% KIs)	Limited Available (% KIs)	Not available (% KIs)	Days stock available	Days needed to restock
Cereals					
Maize	63%	25%	7%	15	3
Sorghum	42%	30%	15%	11	3
Teff	60%	28%	8%	15	3
Wheat	42%	33%	17%	14	4
Barley	32%	26%	27%	20	3
Enset	4%	5%	62%	4	2
Rice	34%	28%	25%	3	3
Pulses					
Garden pea	86%	0%	0%	8	2
Faba bean	86%	0%	0%	10	2
Lentils	86%	14%	0%	10	2
Meat and Fish					
Beef	60%	22%	12%	2	2
Goat meat	96%	4%	0%	1	1
Camel meat	40%	40%	20%	2	5
Dry fish	100%	0%	0%	4	3
Vegetables					
Green leafy	55%	28%	8%	2	1
Tomatoes	58%	35%	1%	4	2
Onions	61%	36%	1%	5	3
Potatoes	60%	34%	1%	5	2
Okra	80%	20%	0%	2	1
WASH					
Bath soap	78%	18%	2%	15	2
Laundry soap	78%	15%	3%	15	2
Sanitary pads	65%	16%	8%	15	2
Water purification	27%	11%	45%	5	2
Shelter					
Plastic bucket	50%	22%	18%	15	3
Washing basin	48%	18%	20%	15	2
Education					
Exercise book	73%	15%	7%	15	3
Pen/pencil	76%	13%	5%	15	2
Rubber	47%	17%	22%	15	2
Ruler	45%	18%	25%	13	2
Other					
Cooking oil	71%	22%	1%	14	2
Milk	39%	29%	2%	1	1
Egg	64%	22%	6%	5	2
Salt	79%	13%	3%	15	3

- All interviewed retailers reported 100% availability of dry fish in October 2024.
- In October 2024, limited availability was reported for camel meat (40%), onions (36%), tomatoes (35%), potatoes (34%), and wheat (33%). Limited availability of onions (42%), onions (42%) and potatoes (36%) were also reported for September 2024.
- In October 2024, the commodities facing the highest unavailability issues were enset (62%), water purification (45%), rice (25%), and ruler (25%).

11. Red numbers in this table flag the rate of unavailability of items.

Methodology

JMMI data is collected in the form of key informant interviews (KIIs), with retailers in target markets serving as the key informants (KIs). KIs were asked for information encompassing the 30 days prior to data collection. Findings represent KIs' understanding of the situation in their markets and therefore are indicative only.

A woreda's largest urban market place(s) devoted to retail is/are prioritised for data collection, with expansion to rural areas depending on the availability of contributing partners. For the purposes of the Ethiopia JMMI, a market place is defined as an area with a relatively sizable concentration of traders in close proximity to each other. Within each target market place, field teams are responsible for identifying a sufficient number of traders to interview 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 7 and 17 October 2024. In October, 22 of the Ethiopia Cash Working Group (CWG) JMMI partners conducted a total of 590 KIIs. This round covered 171 marketplaces, which were sampled by partners nationwide based on their access and existing areas of intervention. This round includes 73 out of 1142 woredas in Ethiopia.

Challenges and limitations

- The Central Ethiopia and South Ethiopia regions were not assessed due to the unavailability of data collection partners.
- In October 2024, prices for pulses were not collected in Dire Dawa, Harari and Sidama. Similarly, green leafy vegetables, milk, salt, sanitary pads, water treatment, education and shelter items prices were not collected in Dire Dawa, Harari, and Sidama, which could have likely affected the monthly price change reported in Table 1 and Table 2. Similarly, it was not able to collect data in Addis Ababa and South Ethiopia.
- The JMMI methodology specifies that three prices should be collected per commodity, per woreda. For this round of data collection, less than three prices were collected per woreda for faba beans, lentils, plastic buckets, rubbers, rulers, washing basins and water treatment items.
- All findings are indicative and not statistically generalisable at any level.

About the CWG

The Ethiopia Cash Working Group (ECWG) is a forum of technical professionals dedicated to enhancing the quality of CVA. Established in 2016, the ECWG serves as an inter-agency and inter-sectoral platform providing strategic and technical support on cash programming across sectors and clusters, social-protection mechanisms and development and resilience-based response. The CWGs support includes both technical functions that focus on process and strategic functions that focus more on results and impact.

Participating agencies

- ACF – Action Contre le Faim
- ACTED – Agency for Technical Cooperation and Development
- AIE – Action Aid Ethiopia
- Ayuda en Acción Ethiopia
- CARE
- Caritas Switzerland
- DCA – Danish Church Aid
- EECMY DASSC
- EOC DICAC
- GOAL
- Helvetas
- IRC – International Rescue Committee
- IRE – Islamic Relief Ethiopia
- Mercy Corps
- NRC – Norwegian Refugee Council
- PC – Pastoralist Concern
- Plan International
- RHSPDO – Renaissance for Health and Socioeconomic Progress Development Organization
- SCI – Save the Children
- Self Help Africa
- WHH – Welthungerhilfe
- WVI – World Vision International

22	Participating agencies
12	Assessed regions
73	Assessed woredas
577	Key informant interviews (KIIs)
34	Commodities assessed

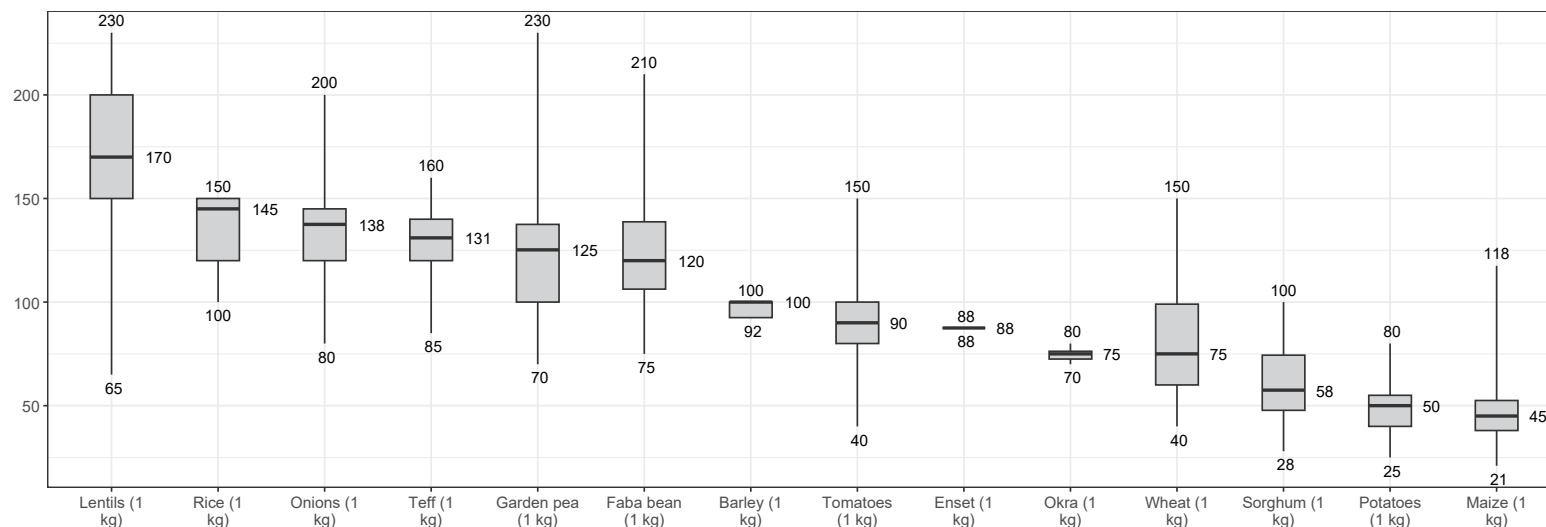
About REACH

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.

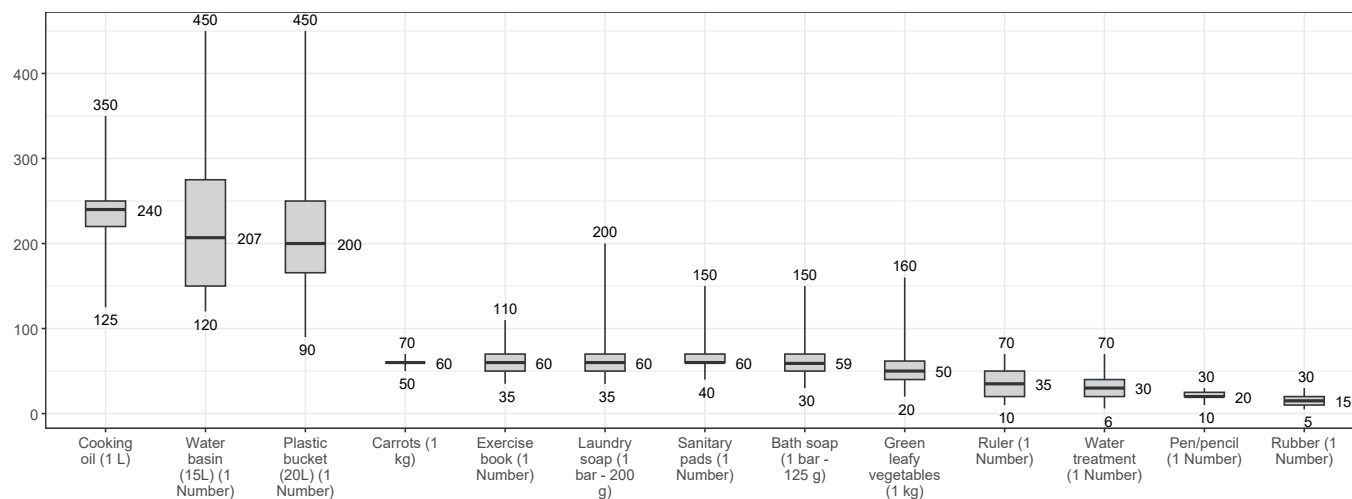
All the Ethiopia JMMI and other assessment outputs, including factsheets and datasets, are openly available on the [REACH Resource Centre](#).

ANNEX 1: Distribution of Prices

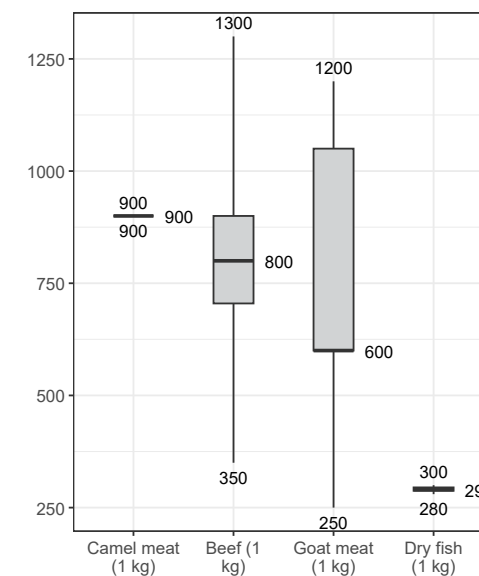
Food Items



NFIs



Meat and Fish Items



Other Food Items

