

Kenya | Joint Market Monitoring Initiative (JMMI)

Q1 2026 (January - March)

INTRODUCTION

The Kenya Joint Market Monitoring Initiative (JMMI) was established under the guidance of the Kenya Cash Working Group (KCWG) to inform cash-based interventions and to gain a deeper understanding of market dynamics in Kenya. 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. It is conducted quarterly in collaboration with local and international non-governmental organizations (NGOs).

According to the March 2026 National Drought Management Authority (NDMA) drought situation update, Mandera and Wajir were the only counties classified under the Alarm drought phase, while seven counties, including Garissa, Turkana, Isiolo, and Marsabit were classified under the Alert phase. This reflects the onset of the March to May 2026 long rains, which coincided with the start of the planting season and contributed to an improvement in pasture and water availability in some areas.^{4,5}

Data collection for Q1 2026 was conducted between 11th March 2026 and 2nd April 2026. This factsheet presents an overview of median prices and availability of essential food and non-food items (NFI) in the assessed counties, along with an update on the cost of the Minimum Expenditure Basket (MEB)¹ in these areas. Additionally, it offers insights into supply chains and vendors' market perceptions.

**For more information on the methodology, please refer to [page 10](#).*

Q1 2026 ASAL COVERAGE

833 Vendors interviewed

90 Markets assessed

34 Commodities assessed

10 Participating agencies

10 Counties assessed

KEY INDICATORS

Cost of Food MEB¹

13,791 KES

106.98 USD²

▼ 722 KES (5%)³

Cost of Non-Food MEB¹

5,347 KES

41.48 USD²

▼ 192 KES (3%)³

Cost of MEB¹

19,138 KES

148.46 USD²

▼ 883 KES (4%)³

ASSESSED COUNTIES AND MEDIAN TOTAL MEB VALUES

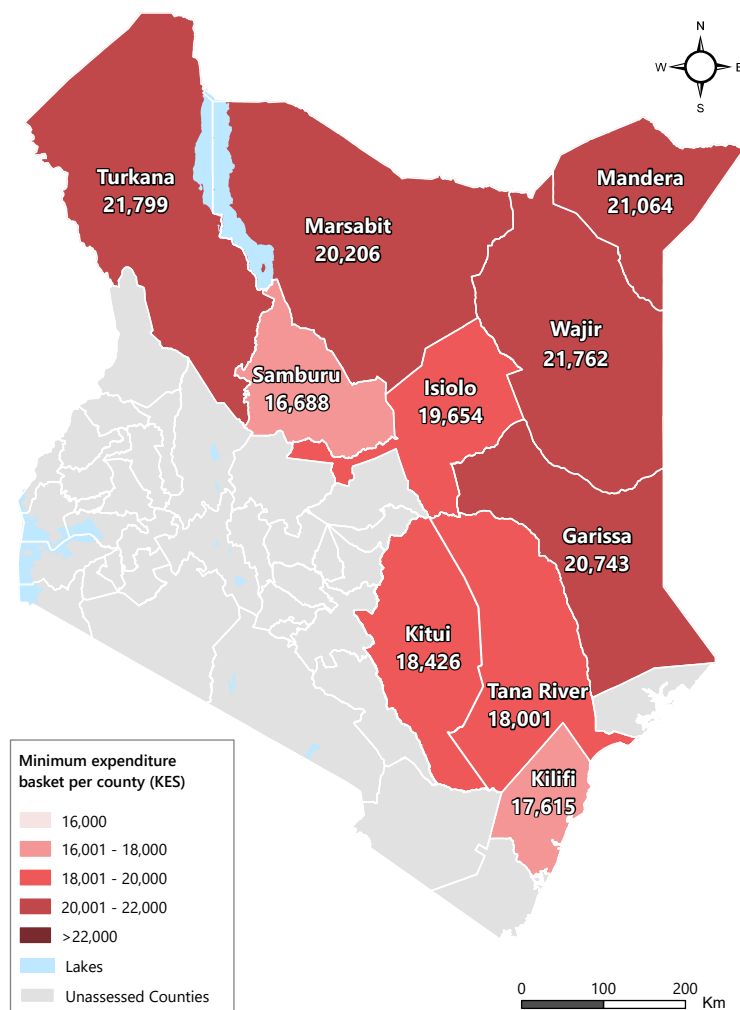


Figure 1: Map of the Q1 2026 assessed counties and MEB values

MARKET OVERVIEW

KEY FINDINGS

- Despite the decline in the national MEB¹ compared to the [previous quarter](#), county level trends remained mixed, reflecting localized market conditions, transport costs, and supply chain constraints.
- Most staple foods remained widely available, supported by diversified supplier networks and generally short restocking times, indicating stable supply chains.
- The majority of vendors (overall 96%) reported facing operational challenges. These were primarily linked to higher supplier prices, insufficient funds to restock, and reduced customer numbers.
- Nearly three-quarters (71%) of interviewed vendors reported that markets were physically accessible. However, over two-thirds (69%) indicated that their customers faced financial barriers, with the inability to afford available goods emerging as the most commonly reported constraint.
- Out of the 90 markets assessed, 8% were classified as fully functional, 61% as having limited functionality, and 31% as having poor functionality. This highlights ongoing challenges in market operations and underscores the dynamic nature of market functionality across the assessed counties.

ONLINE DASHBOARD

An interactive online dashboard is available to explore the data collected through the JMMI, including the prices of monitored items and the cost of the MEB across different ASAL counties in Kenya and time periods. To access the dashboard, visit <https://dashboards.impact-initiatives.org/ken/>

RURAL MINIMUM EXPENDITURE BASKET (MEB)

The MEB comprises essential commodities and services, representing the average monthly cost for a six-person household to meet its culturally adjusted basic needs. The Rural MEB serves as a financial proxy for these requirements.

Only the key components of the MEB i.e. food and NFIs as defined by the KCWG were used to compute the MEB. The MEB also includes fixed costs that account for essential household expenditures.

Food Items

Quantity

Maize flour	32.25 Kg
Rice	22.5 Kg
Cowpeas	7.5 Kg
Vegetable Oil	5.25 L
Dried beans	7.5 Kg
Cow milk, whole, not fortified	22.5L
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

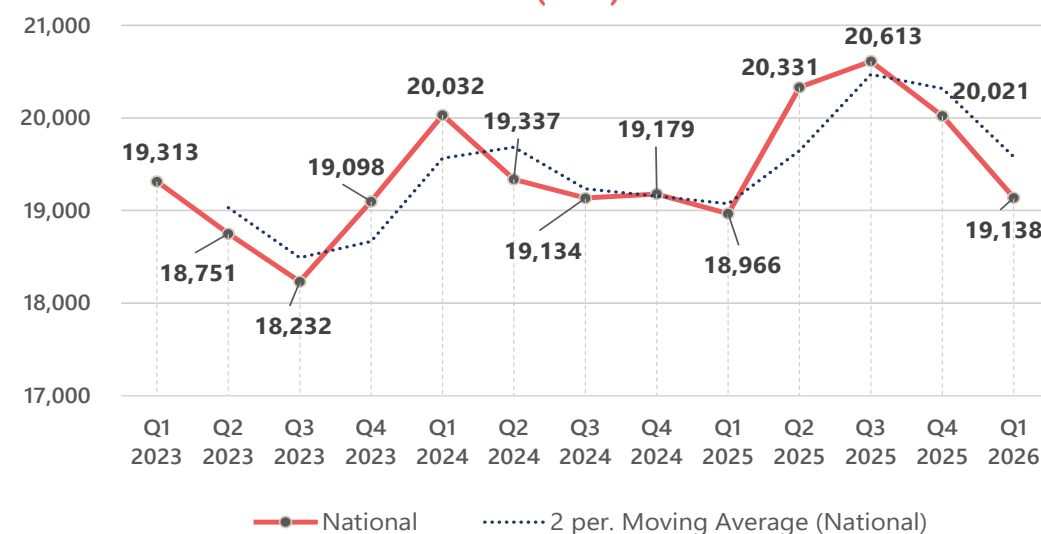
** Prices for traditional vegetables for Mandera are based on national median price due to missing prices during the Q1 2026 assessment.

COST OF THE MEB IN KES AND CHANGE SINCE Q4 2025

County	MEB	Change	Food MEB	Change	NFI MEB	Change
Turkana	21,799	▲ 8%	17,175	▲ 21%	4,624	▼ 23%
Wajir	21,762	▲ 2%	14,496	▼ 14%	7,266	▲ 55%
Mandera**	21,064	▼ 11%	15,185	▼ 8%	5,879	▼ 19%
Garissa	20,743	▼ 2%	16,075	▲ 4%	4,668	▼ 19%
Marsabit	20,206	▲ 6%	14,569	▲ 9%	5,638	0%
Isiolo	19,654	▲ 2%	12,867	▼ 4%	6,786	▲ 15%
Kilifi*	18,802		12,993		5,810	
Kitui*	18,426		13,086		5,340	
Tana River*	18,001		12,903		5,098	
Samburu*	16,688		12,186		4,502	

* No MEB evolution data has been reported due to the absence of data collection in Kilifi, Kitui, Samburu and Tana River counties during the previous round (Q4 2025).

EVOLUTION OF THE RURAL MEB (KES) OVER TIME



The National Rural MEB has fluctuated over time, reflecting shifts in market dynamics, including periods of heightened inflationary pressures, changes in tax policies, and variations in climatic conditions affecting supply and commodity prices. It peaked at KES 20,613 in Q3 2025 and has since declined to KES 19,138 in Q1 2026, a 4% decrease compared with the [previous round](#), driven by lower food costs following seasonal improvements in market supply.⁶

Q1 2026 MEB TAKEAWAYS

- Compared with the [previous round](#), the overall MEB increased across most assessed counties with comparable data, largely driven by an increase in the Food MEB.
- Turkana County recorded the highest overall MEB, largely driven by a rise in the food component. Turkana county also recorded the highest food MEB, driven by increases in the cost of staples such as rice (+33%) and beans (+33%), while the cost of milk nearly doubled, increasing by 82%.
- Wajir recorded the highest NFI MEB, increasing by 55% compared with the previous quarter, primarily due to the cost of water refilling, which increased from 8 KES to 50 KES.
- According to the March 2026 Agricultural Sector Survey by the Central Bank of Kenya (CBK), food prices remained relatively stable throughout March, supported by favourable weather conditions across key agricultural zones.⁶
- Despite favourable seasonal conditions associated with the 2026 March to May long rains, market conditions remained constrained by rising transportation cost, and supply chain disruptions, contributing to mixed commodity price trends.⁷

FOOD AND NFI PRICE COMPARISON

- Overall, mixed price trends were observed across the monitored items. Prices of several staple foods and locally produced vegetables, including white maize (-13%), rice (-14%), kale (-25%), spinach (-22%), and traditional vegetables (-25%), declined, likely reflecting the impact of seasonal factors.
- Various monitored NFIs, such as WASH and education-related commodities, remained stable or recorded price decreases, including charcoal (-33%), jerrycans (-17%), and pens (-50%). Notable increases were observed for buckets (+43%) and kerosene (+11%).

MEDIAN PRICES OF ITEM PER COUNTY IN KES AND CHANGE SINCE PREVIOUS ROUND

Items	Overall median cost	Change	Garissa	Isiolo	Kilifi	Kitui	Mandera	Marsabit	Samburu	Tana River	Turkana	Wajir
White maize (1 Kg)	70	▼ 13%	100	60	70	55	120	60	60	65	100	80
Maize flour (1 Kg)	100	0%	100	85	70	90	100	100	60	80	100	100
Wheat flour (1 Kg)	100	0%	100	100	85	90	100	100	100	100	110	100
Rice (1 Kg)	120	▼ 14%	160	120	120	120	200	130	120	110	160	120
Beans (1 Kg)	140	0%	150	130	130	160	120	130	130	140	200	140
Cowpeas (1 Kg)	150	▲ 15%	100	100	155	110	175	160	170	130	180	110
Pigeon peas (1 Kg)	150	▲ 25%	110	105	150	120	*	200	180	120	150	70
Tea leaves (50 g)	25	▼ 17%	30	30	30	25	50	20	20	50	13	20
Cattle milk (1 L)	140	▼ 4%	200	140	150	100	100	140	120	140	200	160
Vegetable oil (1 L)	300	▲ 7%	300	300	260	270	250	300	300	290	300	300
Salt (200 g)	15	▼ 25%	20	15	10	15	25	15	15	10	20	17.5
Sugar (1 Kg)	160	▲ 14%	150	160	160	180	155	150	160	150	200	140
Onions (1 Kg)	120	▲ 20%	135	80	145	110	100	100	100	130	100	100
Tomatoes (1 Kg)	100	0%	100	70	100	90	115	100	80	100	100	100
Kale (1 Kg)	60	▼ 25%	80	50	75	100	95	100	50	80	70	80
Spinach (1 Kg)	70	▼ 22%	80	60	75	120	140	120	60	60	90	80
Traditional vegetables (1 Kg)	60	▼ 25%	62.5	50	50	100	*	50	60	60	80	110
Cabbage (500 g)	100	0%	90	55	100	95	90	100	95	82.5	100	130
Soap (120 g)	50	0%	50	50	50	40	50	30	30	50	30	50
Sanitary pads (8 pack)	100	0%	100	80	70	80	100	100	80	80	100	100
Toothpaste (35 ml)	50	0%	60	50	40	80	100	70	50	47.5	75	50
Jerry can (20 L)	150	▼ 17%	250	120	150	150	*	200	150	150	200	200
Bucket (20 L)	285	▲ 43%	252.5	225	100	300	300	250	300	275	250	250
Solar lamp (1 pc)	550	▲ 5%	400	600	500	700	500	500	550	750	600	550
Refill Liquefied Petroleum Gas (LPG 6 Kg)	1,300	▲ 4%	1,500	1,300	1,300	1,450	1,500	1,100	1,200	1,350	*	1,500
Firewood (1 bundle)	100	0%	150	200	150	100	200	50	150	120		100
Charcoal (2 Kg)	100	▼ 33%	100	80	150	70	175	100	50	70	50	150
Kerosene (1 L)	200	▲ 11%	*	300	180	200	180	200	200	217.5	*	*
Pen (1 pc)	10	▼ 50%	10	10	10	10	17.5	15	10	10	10	10
Pencil (1 pc)	10	0%	10	10	10	10	10	10	10	5	10	10
Rubber (1 pc)	10	0%	10	10	5	10	15	10	10	5	10	10
Exercise book (1 pc)	20	0%	40	15	15	25	22.5	20	15	15	20	50
Sharpener (1 pc)	10	0%	10	10	5	10	12.5	10	10	5	10	10
Water refill from a tap stand or borehole (20 L)	20	0%	10	50	30	20	12.5	30	20	20	15	50

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

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

Items ⁸	Number of KIs interviewed per item	Wide availability (% KIs)	Limited availability (% KIs)	Complete unavailability (% KIs)
White maize (1 Kg)	246	64%	32%	3%
Maize flour (1 Kg)	354	89%	11%	0%
Wheat flour (1 Kg)	325	89%	9%	1%
Rice (1 Kg)	382	91%	9%	0%
Beans (1 Kg)	346	84%	16%	0%
Cowpeas (1 Kg)	69	27%	47%	22%
Pigeon peas (1 Kg)	55	19%	45%	31%
Tea leaves (50 g)	270	93%	6%	0%
Cattle milk (1 L)	239	71%	24%	5%
Vegetable oil (1 L)	332	90%	10%	0%
Salt (200 g)	387	93%	7%	0%
Sugar (1 Kg)	393	93%	7%	0%
Onions (1 Kg)	229	80%	19%	0%
Tomatoes (1 Kg)	233	82%	18%	0%
Kale (1 Kg)	164	58%	35%	7%
Spinach (1 Kg)	163	55%	35%	10%
Traditional vegetables (1 Kg)	66	25%	36%	36%
Cabbage (500 g)	231	73%	26%	0%
Soap (120 g)	304	95%	5%	0%
Sanitary pads (8 pack)	240	78%	19%	2%
Toothpaste (35 ml)	214	72%	23%	3%
Jerry can (20 L)	149	72%	28%	0%
Bucket (20 L)	121	59%	38%	3%
Solar lamp (1 pc)	93	45%	40%	13%
Refill LPG (6 Kg)	100	51%	43%	6%
Firewood (1 bundle)	85	54%	39%	3%
Charcoal (2 Kg)	119	61%	37%	2%
Kerosene (1 L)	37	16%	50%	32%
Pen (1 pc)	270	94%	5%	0%
Pencil (1 pc)	270	93%	7%	0%
Rubber (1 pc)	216	82%	15%	2%
Exercise book (1 pc)	257	88%	12%	0%
Sharpener (1 pc)	217	81%	17%	1%
Water refill from a tap stand or borehole (20 L)	68	73%	26%	0%

Items	Remaining stock (days)	Time needed to restock (days)
White maize (1 Kg)	20	2
Maize flour (1 Kg)	14	1
Wheat flour (1 Kg)	14	1
Rice (1 Kg)	14	1
Beans (1 Kg)	19	1
Cowpeas (1 Kg)	14	2
Pigeon peas (1 Kg)	14	2
Tea leaves (50 g)	16	1
Cattle milk (1 L)	5	1
Vegetable oil (1 L)	14	1
Salt (200 g)	21	1
Sugar (1 Kg)	14	1
Onions (1 Kg)	5	1
Tomatoes (1 Kg)	3	1
Kale (1 Kg)	2	1
Spinach (1 Kg)	2	1
Traditional vegetables (1 Kg)	2	1
Cabbage (500 g)	3	1
Soap (120 g)	15	1
Sanitary pads (8 pack)	20	1
Toothpaste (35 ml)	20	1
Jerry can (20 L)	21	1
Bucket (20 L)	30	1
Solar lamp (1 pc)	30	1
Refill LPG (6 Kg)	21	1
Firewood (1 bundle)	7	1
Charcoal (2 Kg)	7	1
Kerosene (1 L)	9	2
Pen (1 pc)	21	1
Pencil (1 pc)	21	1
Rubber (1 pc)	21	1
Exercise book (1 pc)	21	1
Sharpener (1 pc)	21	1
Water refill from a tap stand or borehole (20 L)	*	*

Over a third (39%) of vendors self-reported limited or no availability of some commodities. Staple food items remained widely available across the assessed markets, with over 80% of vendors self-reporting wide availability of commodities such as rice, wheat flour and maize flour.

Traditional vegetables (36%), pigeon peas (31%), and cowpeas (22%) had the highest rates of complete unavailability, as self-reported by vendors. TMarsabit reported the highest level of complete unavailability for traditional vegetables (71%), while Turkana reported the highest levels for pigeon peas (69%) and cowpeas (57%). The lack of vendors selling pigeon peas and traditional vegetables in particular created gaps in price data for Mandera County, likely reflecting local dietary preferences or the seasonal nature of these crops.

Among the NFIs, energy-related commodities, including kerosene (82%), LPG (49%), and solar lamps (53%), recorded comparatively lower levels of availability than other assessed NFIs.

Overall, the findings indicate generally resilient supply chains, with most commodities maintaining adequate stock levels and median restocking times of one to two days. Lower remaining stock levels were primarily observed for perishable vegetables, given their limited shelf life, while selected energy commodities, including kerosene and LPG, maintained longer stock duration owing to their extended storage viability.

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

MAIN SUPPLY ROUTES

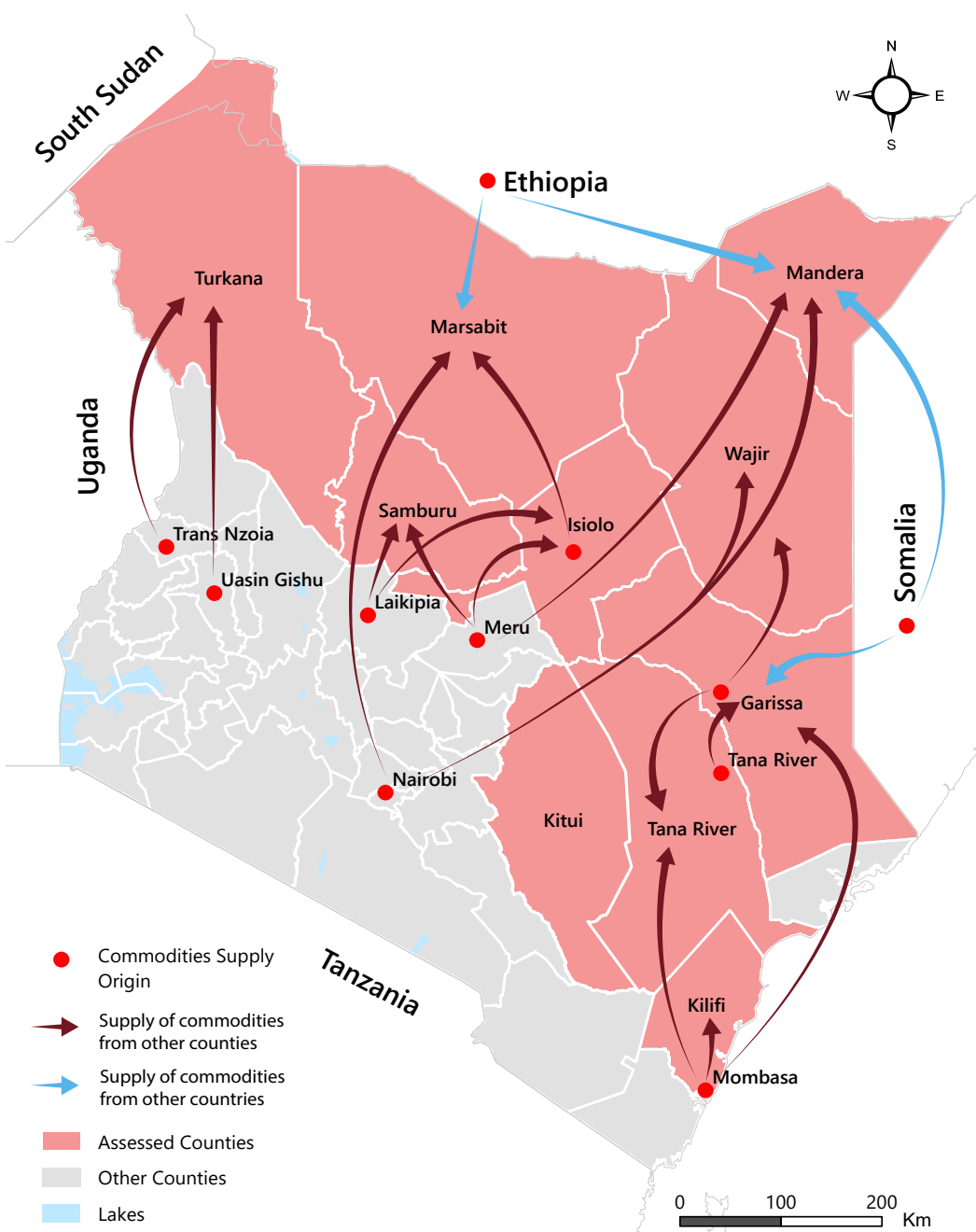


Figure 2: Map of main supply route of assessed counties

*This is a self-reported question to the vendors hence may be subjectivity to their experience, knowledge and awareness.

LOCATION OF MAIN SUPPLIER

Figure 2 presents the supply route map, illustrating the flow of commodities from main suppliers as reported by interviewed vendors. Understanding these supply routes is essential for assessing market resilience.

The majority of vendors (98%) reported that their main suppliers were located within Kenya, primarily within their respective counties, followed by neighbouring counties. This indicates a highly localized supply chain and strong dependence on suppliers within the respective counties, underscoring the importance of local county markets in sustaining commodity availability.

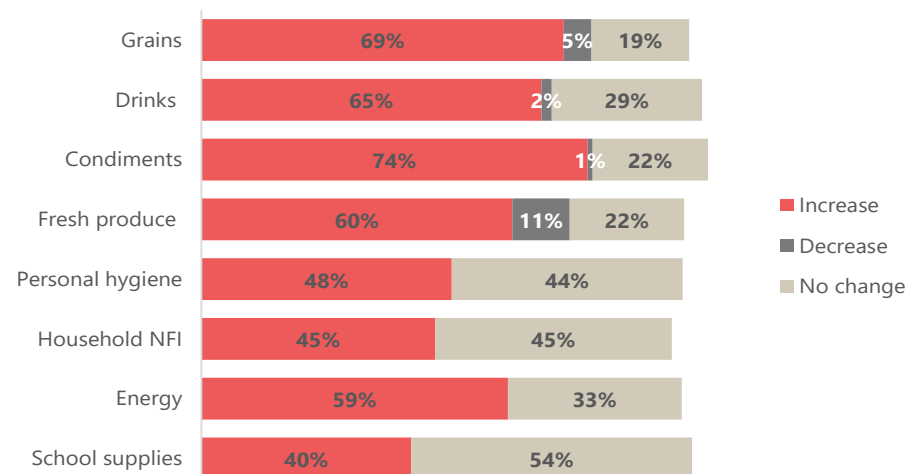
Findings further indicate limited reliance on cross-border trade, with only a few vendors (n=13)⁹ reporting sourcing grains, condiments, and NFIs from neighbouring countries, such as Ethiopia, and Somalia, and these vendors were exclusively located in counties bordering those countries.

REPORTED PREDICTED CHANGES IN SUPPLIERS' PRICES

A considerable proportion of vendors anticipated price increases for key commodities, particularly grains (69%) and energy products (59%). This aligns with the broader macroeconomic outlook. According to the Kenya National Bureau of Statistics (KNBS), annual inflation increased from 4.4% in March 2026 to 5.6% in April 2026, the highest rate recorded since March 2024.¹⁰ Similarly, the CBK reported that respondents expected overall inflation to rise over the subsequent one and three months, largely due to the anticipated effects of the conflict in the Middle East on global energy markets, transportation costs, and supply chains.⁶

Nearly half (51%) of interviewed vendors reported being unable to predict price changes for popular commodities one month ahead of data collection, with frequent and unpredictable price fluctuations cited as the main reason.

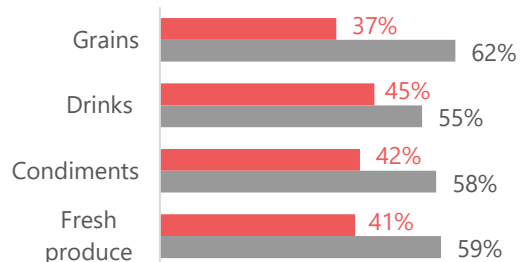
Vendors' predictions of supplier price changes in the month following data collection, by commodity category, among vendors able to predict supplier price changes:^{8*}



SUPPLIER



% of vendors reporting that they mostly relied on a single supplier for food items at the time of data collection, by category:⁸

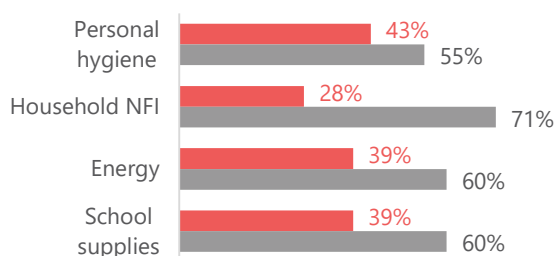


■ Yes, vendors mostly rely on a single supplier

■ No, vendors mostly rely on multiple suppliers



% of vendors reporting that they mostly relied on a single supplier for non-food items at the time of data collection, by category:⁸



■ Yes, vendors mostly rely on a single supplier

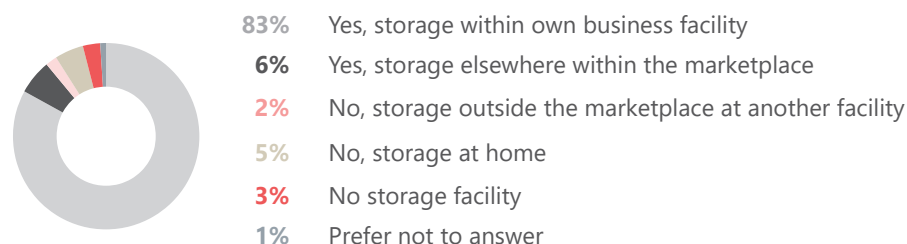
■ No, vendors mostly rely on multiple suppliers

Most vendors sourced commodities from multiple suppliers across both food and NFI categories, indicating a generally diversified supply chain. However, reliance on a single supplier remained common, depending on the commodity category, increasing vendors' vulnerability to localized supply disruptions. On the other hand, reliance on a single supplier may provide benefits such as favourable credit terms and bulk pricing.

ACCESS TO A LOCKED, SECURED STORAGE FACILITY

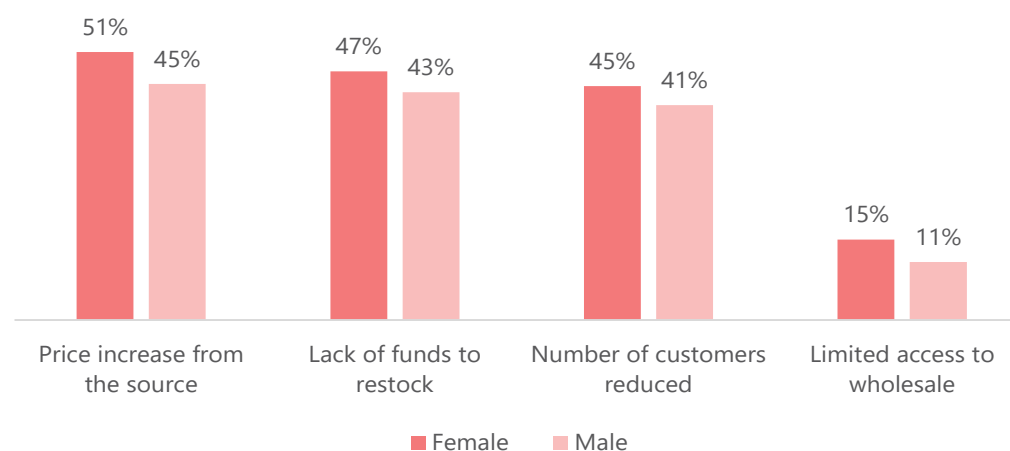
In the 3 months prior to data collection, most of the vendors (89%) reported having access to a locked or secure storage facility within the marketplace. A small proportion (5%) of vendors had storage facilities located outside the marketplace or at their homes. Access to a secure storage facility provides several benefits, including reducing the risk of theft and damage from environmental factors. Conversely, a few (3%) had no access to storage at all, which likely limits their ability to keep adequate stock and restricts their product offerings.

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



CHALLENGES FACED BY VENDORS

Most reported challenges faced in the 3 months prior to data collection, by % of all interviewed vendors by gender:¹¹



■ Female ■ Male

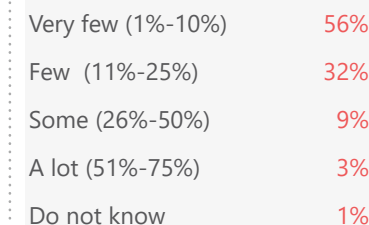
A majority (96%) of vendors reportedly faced vendor-related challenges, with price increases (48%)¹¹ and lack of funds to restock (46%)¹¹ being the most commonly cited issue overall. These challenges highlight the widespread financial stress and shrinking customer bases faced by vendors.

CHANGE IN THE NUMBER OF VENDORS

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



% 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 (24%) who reported a decrease:



Security related challenges were most frequently reported by vendors in Samburu (40%), followed by Turkana (14%). Furthermore, issues related to infrastructure damage within the marketplace were mostly reported in Kilifi, Kitui and Marsabit (all at 11%).¹¹

Despite the reported challenges experienced, half (50%) of interviewed vendors reported an increase in the number of vendors operating in their marketplace.

DIFFICULTIES IN KEEPING THE BUSINESS OPERATIONAL AND WELL STOCKED

Most reported restocking challenges at the time of data collection, by % of all interviewed vendors:¹¹

35% Difficulty with price charged by supplier

26% Unpaid market purchases made on credit

13% Difficulty with availability of core goods

13% Vendors lack sufficient funds to restock

Among the interviewed vendors, 65% of women and 60% of men reported difficulties keeping their businesses operational and adequately stocked.

Restocking challenges were most commonly reported for grains (38%) and fresh produce (34%). For grains, the primary reason cited was vendors reporting insufficient funds to restock commodities, while for fresh produce, vendors attributed the reduced availability to producers producing less of these items.

Conversely, lower levels of restocking difficulty were reported for personal hygiene products (15%) and school supplies (10%), suggesting relatively more stable supply chains for these categories.

Despite the reported challenges, over a third (37%) of vendors indicated that they were not experiencing any operational difficulties at the time of data collection.

SHORTAGE OF COMMODITIES

Most reported causes of commodity shortages, as reported by vendors (39%) who experienced a shortage of some commodities at the time of data collection:¹¹

High transportation cost		57%
Increase in the market price		54%
Low demand for commodities		24%
Low harvest		23%

Compared to the [Q4 2025](#), the proportion of vendors who reported experiencing limited or complete unavailability of some commodities decreased slightly (from 43% to 39%). Among vendors reporting shortages, high transportation costs (57%) and increased market prices (54%) were the most commonly cited causes.¹¹ These findings are consistent with broader national trends, as rising transport costs and inflationary pressures continued to affect market operations despite favourable seasonal conditions.¹⁰

COPING MECHANISMS EMPLOYED

Strategies employed by interviewed vendors to address commodity unavailability at the time of data collection, among vendors (39%) who reported experiencing a shortage:¹¹

Restock more often		40%
Buy additional stock from other suppliers		39%
Buy more from my supplier		35%
Buy commodities on credit		25%

The primary method vendors used to cope with shortages was to restock more frequently, often by purchasing goods on credit or finding alternative suppliers. Additionally, increasing market prices was also reported by vendors in Kitui (78%), Tana River (21%) and Garissa (16%).¹¹ However, vulnerabilities remain, particularly among vendors in Wajir (8%) and Turkana (5%) who reported having no coping strategies in place. The lack of such mechanisms may expose these vendors to income losses or operational disruptions in the event of supply shocks.

CHALLENGES FACED WHEN TRANSPORTING COMMODITIES

Transportation challenges most commonly reported by vendors in the 3 months prior to data collection:¹¹

64%	High cost of transport
34%	Distance is too far to cover on foot
23%	Vehicle/bicycle keeps breaking down
22%	Unusable roads

Most interviewed vendors (92%) reported experiencing transport-related challenges, with the high cost of transportation (64%)¹¹ emerging as the most frequently cited constraint.

Although fuel prices remained unchanged during the mid-March to mid-April 2026 pricing cycle, the broader outlook pointed to rising transport costs due to the anticipated impacts of the conflict in the Middle East on global energy markets and supply chains.^{6,12}

Most vendors (51%) relied on suppliers to deliver commodities to their businesses, while 45% sourced commodities directly. Motor vehicles remained the primary mode of transportation.

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

1	53%	Motor vehicles (Passenger cars, Tuk Tuk, Bus, Motorcycle, Van, Pickup, Truck, Lorry)
2	14%	Supplier delivers
3	8%	On foot

BARRIERS TO MARKET ACCESS

Physical barriers

Nearly a third (29%) of interviewed vendors reported facing issues with physically accessing the marketplace. County level findings indicate that these barriers were most prevalent in Samburu (57%), Kilifi (47%) followed by Marsabit (32%). Among the interviewed vendors, 31% of women and 27% of men reported physical barriers to accessing marketplaces. Turkana (16%), Samburu (14%) and Garissa (6%) were the only counties where respondents reported insecurity as a barrier.

Physical barriers to accessing the marketplace most commonly reported by % of all interviewed vendors in the 3 months prior to data collection:¹¹

- 12%** Limited transportation options
- 11%** Limited operating hours of the market
- 7%** Hazards or damage on roads
- 5%** Ongoing or active fighting in the area

Social barriers

Most interviewed vendors (93%) reported that no groups avoided marketplaces due to discrimination, exclusion, or feeling unwelcome. However, a small proportion (4%) reported that such barriers existed, particularly in Turkana, followed by Mandera. Reports of social barriers were similar among female (5%) and male (4%) vendors.

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



Financial barriers

Financial barriers continued to affect customers' access to marketplaces. Over two-thirds of interviewed vendors (69%) cited financial challenges affecting their customers, indicating that affordability, rather than the physical access and availability of commodities, remained the primary challenge. Customers' inability to afford available items and the inability to pay using an acceptable payment method were the most commonly reported financial barriers. Overall findings suggest that economic factors continue to influence customers' ability to transact in the marketplace, despite the general availability of essential commodities.

Most commonly reported financial barriers to accessing the marketplace faced by customers, as perceived by % of all interviewed vendors, in the 3 months prior to data collection:¹¹

Customers cannot afford the items	36%
Unable to pay using an acceptable method	30%
Public transportation is too expensive	23%
Fuel is too expensive	17%

SECURITY ISSUES

Security factors that negatively impacted businesses commonly reported by % of all interviewed vendors in the 3 months prior to data collection:¹¹

Fear of robbery	17%
Fear of looting	9%
Fear of violence	7%
Danger on roads leading to the marketplace	6%

Among the interviewed vendors, 27% (29% women and 25% men) reported being affected by security related issues that negatively impacted their business, particularly in Samburu (62%), followed by Tana River (31%) and Turkana (29%). Fear of robbery and looting were identified as the main security concern, with fear of robbery highest in Samburu (53%) and Turkana (27%), while fear of looting was highest in Samburu and Tana River (both at 16%).

ACCEPTABLE MODE OF PAYMENT

Most reported accepted payment methods by vendors in the 3 months prior to data collection:¹¹

- 1 99% Cash (local currency)
- 2 73% Mobile money
- 3 21% Informal credit
- 4 12% Money transfers
- 5 3% Credit or Debit cards

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:



% of vendors reporting an increase or decrease in the number of customers purchasing from their shop in the 3 months prior to data collection, among those vendors who reported a change:



Among vendors who reported a change in customer numbers, all vendors in Mandera (100%) and 86% in Samburu reported a decrease.

MARKET FUNCTIONALITY SCORE (MFS),¹³



Figure 3: Map of market functionality of Q1 2026 assessed markets

MARKET FUNCTIONALITY

Market functionality, an extension of the JMMI, integrates indicators from all segments of the assessment and is measured across five key dimensions, each assigned a standard weight:

- **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 dimension contributes to assessing a market's overall capacity to supply customers with essential food and NFIs while enabling vendors to operate effectively. The market classification is determined by aggregating indicators across all assessed vendors to generate a market functionality score (MFS).¹³

Out of the 90 markets assessed, 8% were classified as fully functional, 61% as having limited functionality, and 31% as having poor functionality. Fully functional markets were identified in Samburu (3), Tana River (2) and Turkana (1) and Kilifi (1), reflecting comparatively stronger performance across the assessed market functionality dimensions.

Affordability remained the lowest-performing dimension, with most (84%) of assessed markets scoring below 50% of the maximum weighted score. This was primarily driven by the widespread financial barriers reported by vendors, together with relatively high commodity prices and limited predictability of future price movements. Accessibility and resilience also constrained market performance in several markets, reflecting reported transport, security, and supply chain challenges. In contrast, infrastructure and commodity availability continued to perform relatively well across most assessed markets, indicating that markets generally possessed the physical and financial infrastructure necessary to support trade and maintained adequate availability of essential commodities.

Markets in remote ASAL areas, while serving local communities, may be characterised by a limited number of vendors, which may reflect a specific vulnerability rather than an indicator of broader market failure. Furthermore, it is important to note that the MFS computation is based on five dimensions and may not capture all relevant market attributes. Therefore, market functionality results should be interpreted in context and complemented with local insights into county-level market dynamics.

Methodology

The JMMI is conducted jointly with KCWG partners. The geographic coverage was determined by the access and capacity of participating partners. However, recurring challenges with achieving wider geographic coverage are often linked to resource constraints, and may be further limited by funding gaps or freezes. The participating agencies collectively developed and reviewed the data collection tools and trained their enumerators on the JMMI methodology and tools. **Primary data was collected through structured interviews with vendors (who sell directly to customers) in the targeted marketplaces.** Enumerators were instructed to collect at least three price points per item in each of the assessed marketplaces, covering a total of 34 basic food and NFI items. 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, 833 vendors were interviewed as key informants. The interviews were conducted both face-to-face (95%) and remotely (5%) with vendors selling food and NFIs. Data collection for Q1 2026 was conducted between 11th March 2026 and 2nd April 2026 across 90 markets in the 10 assessed counties.

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 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.
- 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, and as a result, estimations were used. These estimations may differ from one vendor to another.
- Lack of visual verification and the potential for response bias among the small number of surveys (n=11) conducted remotely.
- Apart from Garissa and Samburu counties, not all sub-counties in the respective counties were assessed.
- Limited vendors interviewed in Kitui (8) and Isiolo (28) counties, which may limit the representativeness of findings for these areas.
- In Kitui, only one market was assessed out of the 9 surveys conducted, this may limit the representativeness of findings for the area.

Endnotes

- ¹ World Food Programme, [The Minimum Expenditure Basked \(MEB\) Analysis](#), July 2020.
- ² [1 USD-128.91 KES in March, 2026](#).
- ³ Change since the last round of JMMI data collection in December 2025 ([Q4 2025](#)).
- ⁴ NDMA, [National Drought Early Warning Bulletin](#), March 2026.
- ⁵ Famine Early Warning Systems Network (FEWS NET) , [Seasonal Calendar for Kenya](#), July 2024.
- ⁶ Central Bank of Kenya (CBK), [Agriculture sector survey report](#), March 2026
- ⁷ Famine Early Warning System Network (FEWSNET), [Key Message Update](#), March 2026.
- ⁸ 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".
- ⁹ Sample size (n) refers to the total number of respondents (in this case vendors) in the sample under study.
- ¹⁰ KNBS, [Consumer Price Indices and Inflation Rates](#), April 2026.
- ¹¹ For multiple-answer questions, respondents could select multiple options; as a result, findings may exceed 100%.
- ¹² Kenya Times News, [EPRA Announces Fuel Prices](#), March 2026.
- 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.

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.

Participating agencies

