

# Joint Market Monitoring Initiative (JMIMI) | Dadaab and Kakuma Refugee Camp (Kenya)

Q1 (January - March)

## MARKET OVERVIEW

### INTRODUCTION

To facilitate humanitarian cash programming, the Kenya Cash Working Group (KCWG) in collaboration with local and international NGOs, conduct a quarterly Joint Market Monitoring Initiative (JMIMI) in the Refugee camps. This **JMIMI assesses the availability and prices of essential commodities** typically sold in markets and consumed by the average household. As of 31<sup>st</sup> March 2025, Kenya hosted 843,165 registered refugees and asylum-seekers, up by 19,233 from December 2024.<sup>5</sup> Of these, 428,016 (51%) were in the Dadaab refugee camp, 303,247 (36%) in the Kakuma refugee camp and the remaining 13% were refugees living in urban areas.<sup>5</sup>

The data collection for Q1 2025 was conducted from 10<sup>th</sup> to 17<sup>th</sup> April 2025. This factsheet presents an overview of key foods and non-food items' (NFIs) prices and cost of the **Refugee Minimum Expenditure Basket (MEB)**<sup>1</sup> in the assessed camps. Additionally, it evaluates the supply chains along with the vendors' perceptions of the marketplace and market functionality.

\*For more information on the methodology, please refer to [page 11](#).

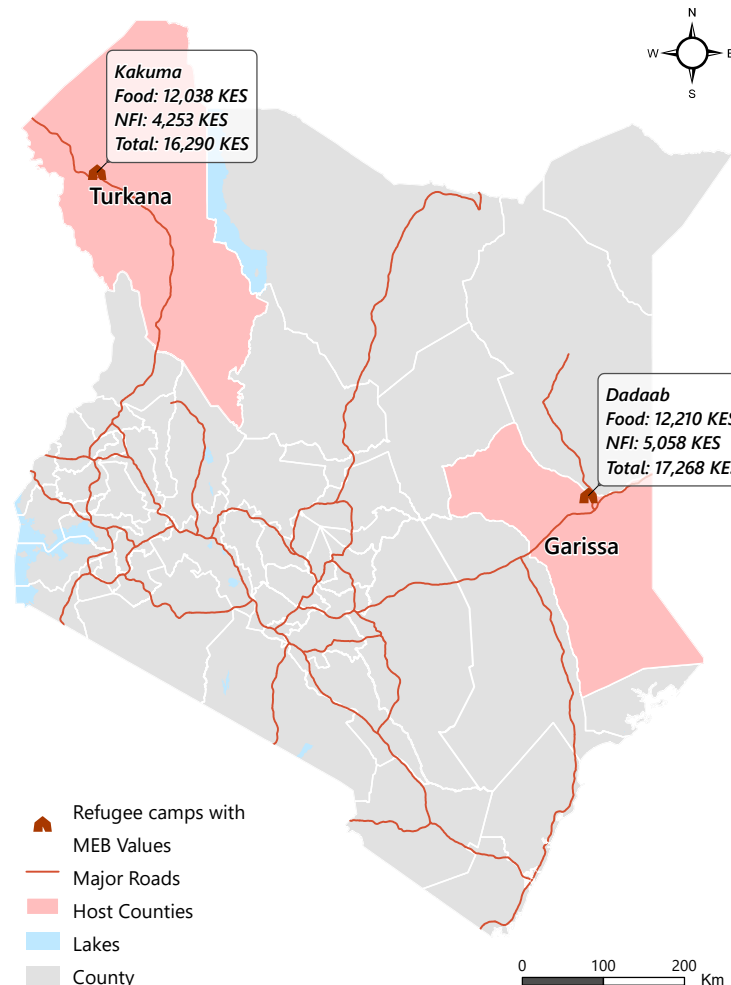
### Q1 2025 REFUGEE CAMP COVERAGE

382	Vendors interviewed
67	Commodities assessed
13	Markets assessed
7	Participating agencies
2	Camps assessed

### KEY INDICATORS

<b>Cost of Food MEB<sup>1</sup></b> 12,124 KES 93.63 USD <sup>2</sup> ▲ 188 KES (2%) <sup>3</sup>	<b>Cost of Non Food MEB<sup>1</sup></b> 4,655 KES 35.95 USD <sup>2</sup> ▲ 238 KES (5%) <sup>3</sup>	<b>Cost of MEB<sup>1</sup></b> 16,779 KES 129.57 USD <sup>2</sup> ▲ 426 KES (3%) <sup>3</sup>
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### ASSESSED CAMPS AND MEDIAN MEB VALUES



### KEY FINDINGS

- Despite the slight decrease in the cost of Minimum Expenditure Basket (MEB)<sup>1</sup> in Dadaab compared to the previous quarter<sup>3</sup>, it remained consistently higher than in Kakuma since December 2023.
- The main challenge reported among the vendors was restocking. More than half of the vendors in Kakuma (64%) and 43% in Dadaab reported experiencing difficulties in keeping their businesses well-stocked.
- Physical access barriers were slightly more prevalent in Kakuma (37%) than in Dadaab (32%), marking an increase compared to the previous quarter<sup>3</sup>. This rise is likely attributed to disruptions caused by the March–April–May (MAM) 2025 long rains season in Kenya,<sup>4</sup> which caused infrastructure disruptions that hindered movement. However, affordability continues to pose a more significant constraint to market access for households (HHs) than physical accessibility.
- The market situation presented mixed outcomes: of the 13 markets assessed, functionality declined in four (two in Kakuma and two in Dadaab) and improved in three (one in Dadaab and two in Kakuma). These results highlight ongoing challenges and underscore the dynamic and shifting nature of market functionality across the camps.

Figure 1: Map of the Q1 2025 assessed camps and MEB values

## REFUGEE MINIMUM EXPENDITURE BASKET (MEB)

The refugee MEB<sup>1</sup> 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<sup>1</sup> by specifically considering refugee needs. The cost of the refugee MEB serves as a proxy for a household's monthly expenditure on basic needs. Only the refugee MEB's key elements, i.e. food and NFIs as defined by the KCWG were incorporated into computing the refugee MEB.

Food Items	Quantity
Maize grain	21 Kg
Rice	21 Kg
Wheat flour	21 Kg
Oil, Vegetable	5.25 L
Dried beans	7.5 Kg
Cow milk, whole	15 Kg
Dark green leafy vegetables	15 Kg
Salt, Iodized	0.75 Kg
Sugar	0.75 Kg

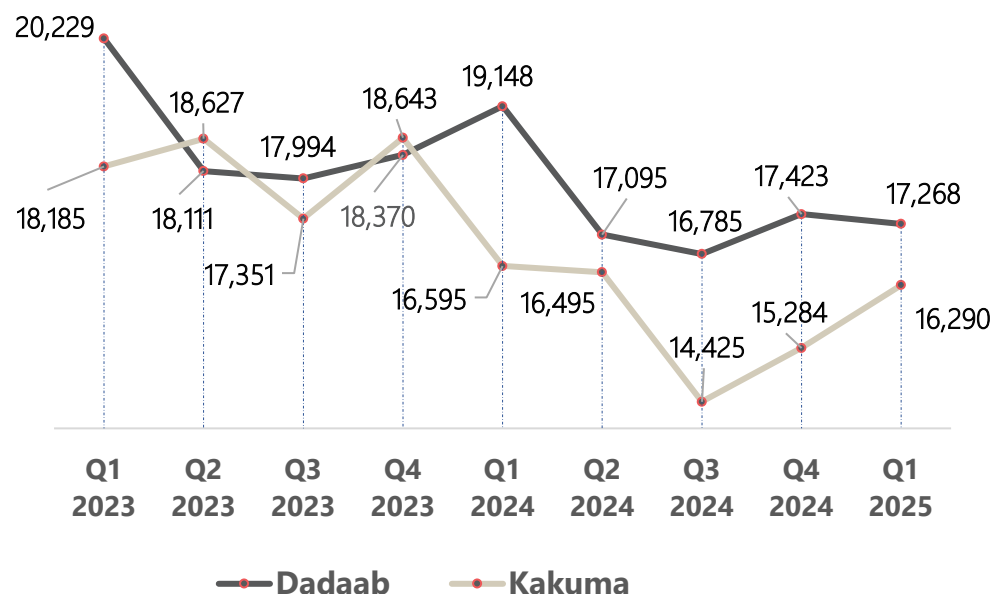
Non-Food Items	Quantity
Multipurpose soap	2.75 Kg
Toothpaste	0.140 L
Tissue paper	8 pcs
Sanitary pads	4 packs of 8
Education (pen, pencil, ruler, book, rubber, sharpener)	1 kit
Firewood	1.5 bundles
Matchbox	2 boxes
Lighting cost	800 KES
National Health Coverage	500 KES
Public transport	1,000 KES

## COST OF THE MEB IN KES<sup>2</sup> AND CHANGE SINCE Q4 2024

Camp	MEB <sup>1</sup>	Change <sup>3</sup>	Food MEB	Change <sup>3</sup>	NFI MEB	Change <sup>3</sup>
Dadaab	17,268	▼ 1%	12,210	▼ 5%	5,058	▲ 10%
Kakuma	16,290	▲ 7%	12,038	▲ 9%	4,253	• 0%

- According to the March 2025 Agricultural Sector Survey by the Central Bank of Kenya (CBK), food prices showed mixed trends, with improved output of key staples linked to a favorable long rains outlook and ongoing subsidized fertilizer interventions.<sup>6</sup>
- The early onset of rains in parts of Garissa County, where Dadaab camp is located, may have improved agricultural outputs, resulting to lower food prices contributing to the 5% drop in the food MEB. Conversely, the NFI MEB recorded a notable 10% increase, partly driven by higher costs of stationery items.
- Conversely, Kakuma camp experienced a sharp rise in the food MEB, primarily driven by a significant increase in the cost of milk (+60%), while NFI prices remained stable. Despite the increase in food costs within the Kakuma refugee camps, prices remained even higher in the host county of Turkana, as reported in the [KCWG Q1 2025 ASALs JMMI report](#).

## EVOLUTION OF THE REFUGEE MEB IN KES<sup>2</sup> PER CAMP OVER TIME



## Q1 2025 TAKEAWAYS

- **Dadaab's Refugee MEB remains higher than that of Kakuma**, which may be partly attributed to a higher proportion of respondents in Dadaab reporting supply chain disruptions. These included unusable roads (46%)<sup>7</sup> and flooding in marketplaces (20%)<sup>7</sup>, both of which posed challenges to restocking essential goods.
- Between December 2024 and March 2025, the highest quarterly food price decreases were observed in Dadaab camp, notably for white maize (-40%) and cattle milk (-17%). Both maize flour and wheat flour prices remained stable across the camps. In Kakuma camp, food prices increased, with cattle milk rising sharply by 60%, becoming a major driver of the overall increase in the food MEB. Other notable price increases included rice (+8%), salt (+9%), and kale (+7%), while declines in cowpeas (-20%) and beans (-13%) suggest improved supply of pulses.
- Among the monitored NFI items, the price of pencils (+33%) and A5 exercise books (+25%) rose in Dadaab, contributing to a 17% increase in the education kit cost. In contrast, prices for these items remained unchanged in Kakuma.
- **More than half (64% in Kakuma and 53% in Dadaab) of vendors self-reported limited or no availability of some commodities.** Vendors in Dadaab reported generally better availability of food, education, and construction items compared to those in Kakuma.
- Despite restocking challenges, the average restocking time in both camps was mostly one day. This short restocking period suggests a low likelihood of prolonged commodity shortages.

**KEY**

▼ Decrease ▲ Increase • Change between 0% and <1% \* Not applicable

MEDIAN PRICE IN KES<sup>2</sup> OF ITEMS PER CAMP

Items <sup>8</sup>	Unit	Dadaab	Change <sup>3</sup>	Kakuma	Change <sup>3</sup>
<b>Food items</b>					
White maize	1kg	60	▼ 40%	70	▲ 17%
Maize flour	1kg	100	0%	80	0%
Wheat flour	1kg	100	0%	90	0%
Rice	1kg	120	▲ 20%	110	▼ 8%
Spaghetti	500g	80	0%	80	0%
Beans	1kg	130	▲ 8%	130	▼ 4%
Cowpeas	1kg	150	▲ 15%	180	▲ 20%
Cowpeas leaves	1kg	100	0%	50	0%
Yellow split peas	1kg	100	0%	180	▲ 50%
Sugar	1kg	130	▲ 8%	160	▲ 7%
Vegetable oil	1lt	280	▲ 8%	300	0%
Salt	200g	10	0%	10	0%
Cattle milk	1lt	150	▼ 17%	160	▲ 60%
Camel milk	1lt	150	0%	200	0%
Goat meat	1kg	800	0%	700	0%
Camel meat	1kg	650	▲ 18%	600	0%
Onions	1kg	120	▲ 9%	100	0%
Tomatoes	1kg	80	▲ 33%	100	0%
Kale	1kg	100	0%	70	▼ 7%
<b>WASH items</b>					
Sleeping mat	1pc	1,000	*	500	*
Mosquito net	1pc	400	*	500	*
Tooth paste	50g	100	0%	100	▼ 13%
Tissue paper	1pc	100	▲ 100%	30	0%
Bar soap	200g	50	0%	50	0%
Jerry can	1pc	150	0%	190	▲ 27%
Bucket	1pc	200	▲ 11%	150	▼ 12%
Pads	1pc	100	0%	100	0%
Toothbrush	1pc	50	*	30	*
Underwear for girls	1pc	150	*	80	*
Underwear for female adults	1pc	200	*	100	*
Blanket	1pc	450	*	500	*
<b>Cooking energy items</b>					
Firewood	1 bundle	100	0%	80	▲ 35%
Charcoal	2kg	130	▼ 13%	50	0%
Matchbox	2pc	5	0%	5	0%

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

## KEY

3 ▼ Decrease ▲ Increase ● Change between 0% and <1% \* Not applicable

Items <sup>8</sup>	Unit	Dadaab	Change <sup>3</sup>	Kakuma	Change <sup>3</sup>
<b>Education items</b>					
Shoes (< five years boys/girls)	1pair	1,000	*	600	*
Shoes (5-12 years boys/girls)	1pair	1,150	*	575	*
Uniform girls	1pair	1,900	*	650	*
Uniform boys	1pair	1,350	*	900	*
Pencils	1pc	10	0%	5	0%
Pens	1pc	20	▲ 33%	10	0%
Exercise books	1pc	25	▲ 25%	15	0%
Rubbers	1pc	10	0%	5	0%
Socks	1pc	100	*	100	*
School bag	1pc	600	*	500	*
Ruler	1pc	30	0%	30	0%
Sharpener	1pc	10	0%	5	0%
Geometric set	1pc	200	0%	100	0%
<b>Kitchen Items</b>					
Cooking pans	1pc	825	*	500	*
Knife	1pc	100	*	100	*
Spoon	1pc	20	*	20	*
Cup	1pc	90	*	100	*
Plate	1pc	150	*	100	*
<b>Construction items</b>					
Hoop iron	1pc	200	*	200	*
Tower bolt (4 inches)	1pc	100	*	50	*
Tower bolt (6 inches)	1pc	200	*	150	*
Pad bolt	1pc	**	**	150	*
Butt hinge (2 inches)	1pc	80	*	45	*
Butt hinge (4 inches)	1pc	100	*	50	*
Pine timber	1pc	60	*	50	*
Nails (2 inches)	1pc	250	*	200	*
Nails (3 inches)	1pc	250	*	200	*
Nails (4 inches)	1pc	250	*	200	*
Roofing nails	1pc	250	*	250	*
Ceiling nails	1pc	250	*	250	*
Wood preservative	1pc	65	*	250	*
Eucalyptus	1pc	700	*	200	*
Corrugated iron sheets	1pc	900	*	775	*
Uncorrugated iron sheets	1pc	800	*	700	*
Cement	1pc	1,000	*	1,100	*

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

Items <sup>9</sup>	Wide availability (%KIs)	Limited availability (%KIs)	Remaining stock (days)	Time needed to restock (days)
White maize	64%	33%	14	1
Maize flour	83%	13%	7	1
Wheat flour	100%	0%	8	1
Rice	100%	0%	8	0
Spaghetti	100%	0%	7	0
Beans	93%	7%	7	1
Cowpeas	65%	35%	12	1
Cowpeas leaves	31%	69%	1	0
Yellow split peas	51%	49%	12	1
Sugar	100%	0%	10	0
Vegetable oil	97%	3%	8	1
Salt	100%	0%	10	0
Cattle milk	53%	48%	1	0
Camel milk	79%	21%	1	0
Goat meat	61%	39%	1	0
Camel meat	79%	21%	1	0
Onions	93%	8%	7	1
Tomatoes	95%	2%	2	0
Kale	74%	26%	1	0
Sleeping mat	88%	12%	14	1
Mosquito net	85%	15%	14	1
Tooth paste	86%	14%	12	0
Tissue paper	90%	10%	12	0
Bar soap	100%	0%	10	0
Jerry can	74%	26%	14	1
Bucket	71%	29%	12	1
Pads	86%	14%	9	0
Toothbrush	93%	7%	10	0
Underwear for girls	75%	25%	15	2
Underwear for female adults	75%	25%	15	1
Blanket	65%	35%	15	1
Cooking pan	93%	7%	9	2
Knife	93%	7%	6	1
Spoon	89%	11%	10	1
Cup	65%	35%	10	1
Plate	69%	31%	10	1

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

Items <sup>9</sup>	Wide availability (%KIs)	Limited availability (%KIs)	Remaining stock (days)	Time needed to restock (days)
White maize	70%	30%	14	1
Maize flour	83%	17%	14	1
Wheat flour	87%	13%	14	1
Rice	84%	16%	24	1
Spaghetti	83%	17%	15	1
Beans	69%	31%	30	1
Cowpeas	28%	72%	30	2
Cowpeas leaves	57%	43%	2	1
Yellow split peas	21%	76%	30	2
Sugar	79%	21%	15	1
Vegetable oil	81%	19%	15	1
Salt	84%	16%	30	1
Cattle milk	88%	8%	7	1
Camel milk	0%	100%	3	2
Goat meat	38%	63%	1	1
Camel meat	64%	36%	1	1
Onions	84%	16%	7	1
Tomatoes	76%	24%	3	1
Kale	38%	63%	1	1
Sleeping mat	57%	43%	14	2
Mosquito net	50%	50%	21	2
Tooth paste	69%	31%	30	1
Tissue paper	61%	39%	30	1
Bar soap	83%	14%	30	1
Jerry can	44%	56%	18	1
Bucket	48%	52%	30	2
Pads	67%	33%	30	1
Toothbrush	76%	24%	30	1
Underwear for girls	61%	39%	15	2
Underwear for female adults	61%	39%	20	2
Blanket	39%	70%	15	1
Cooking pan	41%	59%	14	1
Knife	42%	58%	14	1
Spoon	40%	60%	13	1
Cup	46%	54%	14	1
Plate	39%	61%	14	1

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

Items <sup>9</sup>	Wide availability (%KIs)	Limited availability (%KIs)	Remaining stock (days)	Time needed to restock (days)
Shoes (<five years boys/girls)	57%	43%	10	1
Shoes (5-12 years boys/girls)	64%	36%	14	1
Uniform girls	82%	18%	15	2
Uniform boys	82%	15%	14	1
Pencil	100%	0%	10	0
Pen	100%	0%	13	0
Exercise book	96%	4%	14	0
Rubber	97%	3%	10	0
Socks	89%	11%	10	1
School bag	88%	12%	8	1
Ruler	96%	4%	14	0
Geometric set	73%	27%	15	1
Sharpener	69%	31%	14	1
Firewood	79%	21%	6	1
Charcoal	67%	33%	5	1
Matchbox	100%	0%	9	0
Hoop iron	47%	53%	15	2
Tower bolt (4 inches)	58%	42%	14	2
Tower bolt (6 inches)	55%	45%	14	2
Pad bolt	**	**	**	**
Butt hinge (2 inches)	68%	32%	14	2
Butt hinge (4 inches)	79%	21%	14	2
Pine timber	59%	41%	15	2
Nails (3 inches)	100%	0%	10	2
Nails (4 inches)	75%	25%	14	2
Nails (2 Inches)	75%	25%	14	2
Roofing nails	75%	25%	14	2
Sealing nails	100%	0%	14	1
Wood preservative	56%	44%	15	2
Eucalyptus/ Blue gum	58%	28%	20	2
Corrugated iron sheet	63%	33%	15	2
Uncorrugated iron sheet	50%	38%	21	3
Cement	67%	36%	16	2

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

Items <sup>9</sup>	Wide availability (%KIs)	Limited availability (%KIs)	Remaining stock (days)	Time needed to restock (days)
Shoes (<five years boys/girls)	18%	82%	20	2
Shoes (5-12 years boys/girls)	20%	80%	19	2
Uniform girls	45%	55%	20	2
Uniform boys	47%	53%	30	2
Pencil	63%	37%	30	1
Pen	74%	26%	30	1
Exercise book	43%	57%	30	1
Rubber	37%	63%	30	1
Socks	44%	56%	30	2
School bag	48%	52%	18	1
Ruler	26%	74%	30	1
Geometric set	34%	66%	30	1
Sharpener	40%	60%	30	1
Firewood	64%	36%	5	1
Charcoal	73%	27%	5	1
Matchbox	77%	23%	30	1
Hoop iron	21%	71%	33	2
Tower bolt (4 inches)	16%	84%	30	2
Tower bolt (6 inches)	29%	71%	30	2
Pad bolt	24%	76%	30	2
Butt hinge (2 inches)	21%	79%	30	2
Butt hinge (4 inches)	19%	81%	30	2
Pine timber	22%	78%	30	2
Nails (3 inches)	27%	73%	14	2
Nails (4 inches)	17%	83%	30	2
Nails (2 Inches)	24%	76%	30	2
Roofing nails	23%	77%	30	2
Sealing nails	24%	76%	30	2
Wood preservative	0%	100%	7	1
Eucalyptus/ blue gum	30%	70%	30	2
Corrugated iron sheet	33%	67%	30	2
Uncorrugated iron sheet	50%	50%	21	2
Cement	33%	64%	30	2

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

## MAIN SUPPLY ROUTES

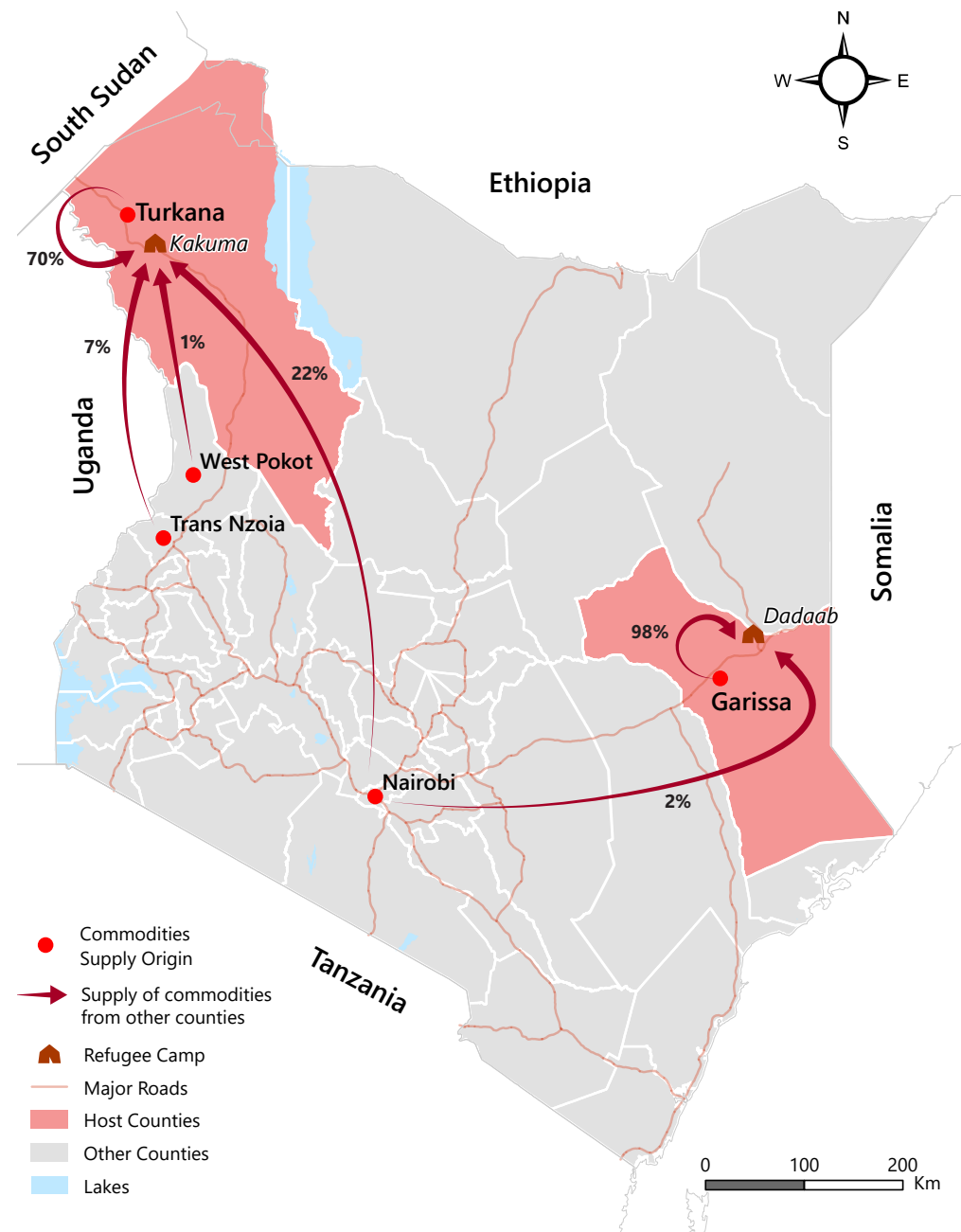


Figure 2: Map of main supply route of assessed camps

## LOCATION OF THE MAIN SUPPLIER

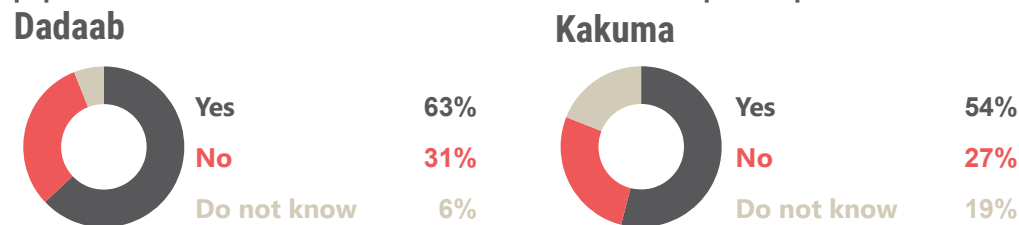
Figure 2 presents the supply route map, illustrating the flow of commodities from the main suppliers as reported by interviewed vendors. These insights are crucial for assessing market resilience.

At the time of data collection, the majority of the interviewed vendors in Dadaab camp (98%) and Kakuma camp (70%) indicated that their main supplier was located within their respective counties. In Dadaab, the short restocking time, within the same day, can be attributed to the high proportion (98%) of interviewed vendors sourcing goods locally within Garissa County. Vendors specifically in Kakuma (22%) and some (2%) in Dadaab, reported sourcing their goods from Nairobi, the capital city which likely increases restocking time due to the distance. Additionally, 7% of vendors in Kakuma camp indicated that they sourced their goods from Trans Nzoia County, a key agricultural production county.<sup>10</sup> No significant differences in sourcing patterns were reported between male and female vendors.

## REPORTED PREDICTED CHANGES IN SUPPLIER'S PRICES

According to the Kenya National Bureau of Statistics (KNBS), the annual inflation rate stood at 3.6% in March 2025, indicating upward pressure on prices in the economy compared to 3% in December 2024.<sup>11</sup> The data indicates that a high proportion of the vendors in Dadaab (63%) and Kakuma (54%) reported being able to predict changes in supplier prices one month after data collection, findings similar to the [previous quarter](#)<sup>3</sup>. The majority of vendors (91% in Dadaab and 81% in Kakuma) expected prices to rise. However, nearly a third (31% of interviewed vendors in Dadaab and 27% in Kakuma) cited frequent price fluctuations as the main reason they could not predict changes.

**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:\*\*\***



**Expectation of supplier price changes one month following data collection, by % of vendors (63% in Dadaab and 54% in Kakuma) who reported being able to predict supplier price changes, per camp:<sup>12</sup>**



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



## SUPPLIER

### Dadaab

Proportion of vendors depending on one supplier for food items.



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



### Kakuma

Proportion of vendors depending on one supplier for food items.



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



A higher proportion of vendors in Dadaab (25% for food items and 20% for NFIs) compared to Kakuma camp, reported relying on a single supplier. Vendors who rely on a sole supplier are vulnerable to supply disruptions.

Compared to the Q4 2024, the slight increase in dependency on a single supplier in both Dadaab and Kakuma may reflect supply chain disruptions.

## ACCESS TO A LOCKED, SECURED STORAGE FACILITY

Compared to the previous quarter<sup>3</sup>, there was an improvement in the number of vendors reporting access to secure storage, particularly in Kakuma, where the proportion increased from 76% to 87%. Additionally, more vendors in both Dadaab and Kakuma reported having storage facilities located within their business premises in comparison to Q4 2024. A slightly higher proportion of female vendors (12%) compared to male vendors (8%) reported not having access to any 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
- 11% Yes, elsewhere within the market place
- 0% No, I store goods at my home
- 7% No, storage outside the marketplace at another facility
- 2% No storage facility

### Kakuma

- 74% Yes, within my own business facilities
- 8% Yes, elsewhere within the market place
- 3% No, I store goods at my home
- 2% No, storage outside the marketplace at another facility
- 13% No storage facility

## VENDOR CHALLENGES

Most reported challenges by vendors in the 3 months prior to data collection, per camp:<sup>7</sup>

### Dadaab

- 1 56% Price increase by the supplier
- 2 32% Lack of funds to restock
- 3 25% Infrastructure damage
- 3 25% Flooding

### Kakuma

- 1 74% Customer reduction
- 2 50% Lack of funds to restock
- 3 43% Price increase by the supplier
- 4 12% Insecurity in the area

A slightly higher proportion of male vendors (95%) than female vendors (92%) reportedly faced vendor-related challenges. The most commonly reported challenge among both female and male vendors was a reduction in the number of customers (56% and 55% respectively)<sup>7</sup>.

Despite the challenges, most vendors (74%) in Dadaab reported an increase in the number of vendors operating in the marketplace compared to three months prior to data collection. In contrast, 40% of respondents in Kakuma reported a decline in business over time. The majority of vendors in Kakuma (95%) cited various operational challenges, with the reduction in customers contributing to lower sales, limited income generation, and declining profitability. These factors may potentially lead to business closures.

## 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



### Kakuma



## CHANGE IN THE NUMBER OF CUSTOMERS

% 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 (75% Dadaab, 88% Kakuma) who reported a change:

Dadaab 82% ▲ 18% ▼

Kakuma 7% ▲ 93% ▼

While the market remain accessible, findings are consistent with Q4 2024. Vendors particularly in Kakuma reported a decreased in customers, where customer reduction (74%)<sup>7</sup> was the most commonly reported challenge.

## DIFFICULTY IN KEEPING THE BUSINESS OPERATIONAL AND WELL-STOCKED

In the first quarter of the year, **more than half (60% female and 55% male) of the interviewed vendors reported experiencing difficulties in keeping their businesses well-stocked.** Similar to the [previous quarter](#), a higher proportion of vendors in Kakuma (64%) reported such challenges compared to 43% in Dadaab.

Across both camps, vendors frequently cited difficulties in accessing essential goods and coping with high supplier prices. In Dadaab, vendors also reported environmental impacts, such as flooding, as a key factor affecting their ability to restock.

**Reported difficulty in keeping the business operational and well-stocked by vendors in the 3 months prior to data collection:<sup>7</sup>**

### Dadaab

- 30%** Difficulty with price charged by supplier
- 20%** Flooding in the marketplace
- 17%** Difficulty with availability of core goods
- 13%** Movement restrictions

### Kakuma

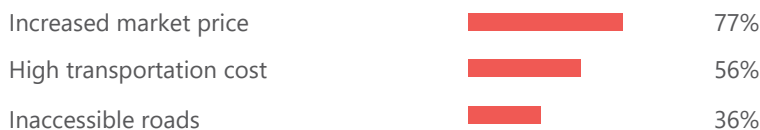
- 50%** Difficulty with price charged by supplier
- 11%** Movement restrictions
- 9%** Difficulty with availability of core goods
- 7%** Theft or damage of commodities

## SHORTAGE OF COMMODITIES

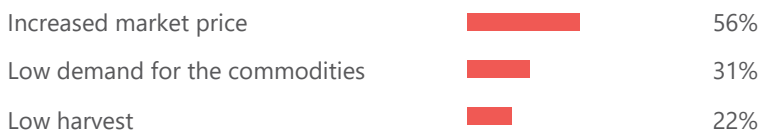
An increase in market prices was the leading contributing factor to reported commodity shortages among vendors who experienced limited or complete unavailability of certain items. The additional reasons for shortages differed by camp, in Dadaab, vendors mainly faced logistical challenges, while Kakuma vendors cited low demand and poor harvests.

**Most reported causes of shortage of commodities by vendors (75% Dadaab, 88% in Kakuma) who reported experiencing shortage of some commodities at the time of data collection, per camp:<sup>7</sup>**

### Dadaab

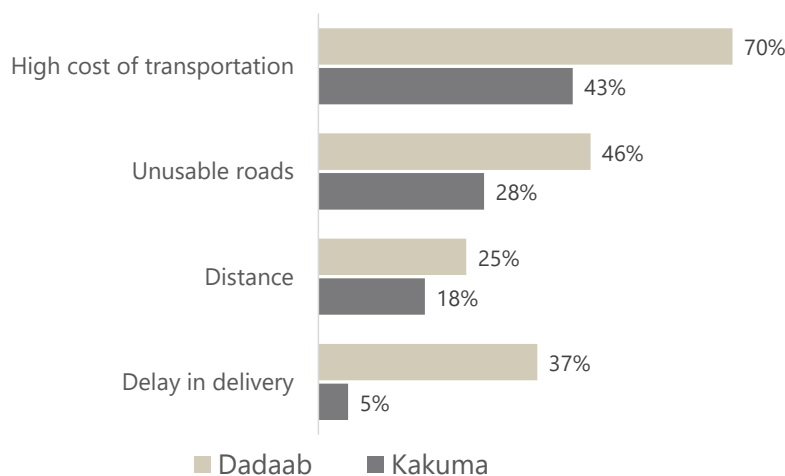


### Kakuma



## CHALLENGES FACED WHEN TRANSPORTING COMMODITIES

**Most reported transportation challenges by vendors in the 3 months prior to data collection, per camp:<sup>7</sup>**



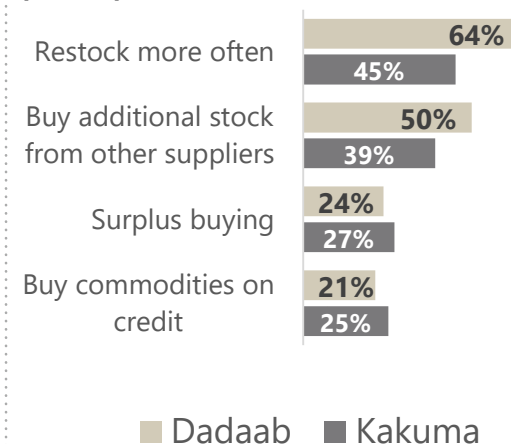
A higher proportion of vendors in Dadaab (93%) reported experiencing transport-related challenges compared to those in Kakuma (73%). In Kakuma, while fewer vendors reported overall challenges, some cited insecurity en route (11%)<sup>7</sup> and damage to goods in transit (9%)<sup>7</sup> as additional concerns.

## COPING MECHANISMS EMPLOYED TO DEAL WITH SHORTAGE OF COMMODITIES

Vendors facing commodity shortages in the three months prior to data collection (91%) employed various coping strategies. Notably, 13% of vendors in Kakuma reported having no coping mechanisms in place, compared to only 1% in Dadaab, suggesting that vendors in Kakuma may be more vulnerable to supply disruptions or have fewer available options for response.

The most common coping strategies reported by vendors in both Dadaab and Kakuma in response to the unavailability of items were restocking more frequently.

**Strategies employed by interviewed vendors to address unavailability of commodities at the time of data collection, by % of vendors (75% Dadaab, 88% in Kakuma) who reported experiencing shortage of some commodities per camp:<sup>7</sup>**



## BARRIERS TO MARKET ACCESS

### Physical barriers

Marketplaces in both refugee camps remained generally accessible, with the majority of interviewed vendors (68% in Dadaab and 63% in Kakuma) reporting no physical barriers. However, minimal gender differences were observed, with 64% of female vendors reportedly facing no barriers compared to 65% of male vendors, suggesting relatively equal levels of access. While male and female vendors reported largely similar experiences, female vendors were slightly more affected by marketplace restrictions (13% female compared to 9% male) and hazards or damage on roads leading to the marketplace (11% female compared to 8% male).

Despite overall accessibility, specific physical barriers varied across camps. These findings highlight persistent infrastructure and mobility-related issues, which may affect the accessibility and availability of goods.

### Most reported physical barriers to accessing the marketplace by vendors in the 3 months prior to data collection, per camp:<sup>7</sup>

#### Dadaab

- 68% No physical barriers
- 16% Lack of transportation options
- 15% Inadequate facilities
- 12% Flooding in the marketplace

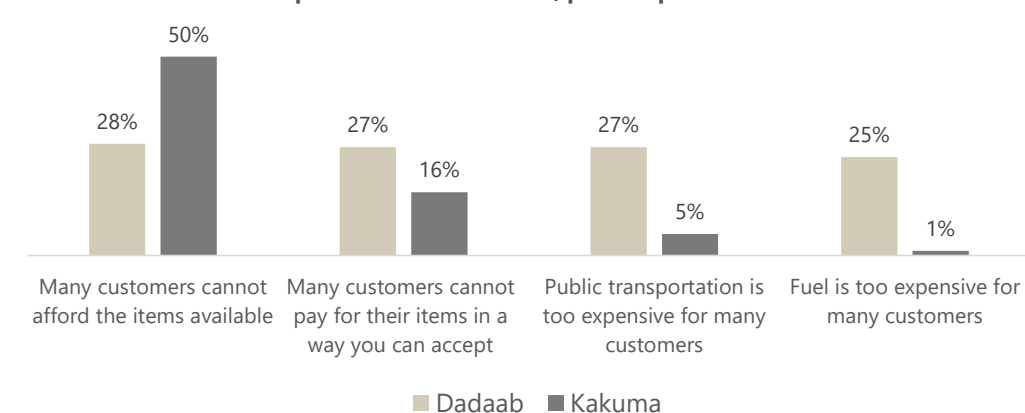
#### Kakuma

- 63% No physical barriers
- 14% Limited operating hours of the market
- 12% Active or ongoing fighting in the area
- 11% Hazard or damage on roads

### Financial barriers

Financial barriers were widely reported by vendors in both camps, 75% in Dadaab and 69% in Kakuma. The most commonly cited barrier was customers' inability to afford goods, reported by 50%<sup>7</sup> of vendors in Kakuma and 28%<sup>7</sup> in Dadaab. In Kakuma, affordability remained the primary concern, with fewer vendors reporting transport-related costs as significant challenges. These findings suggest greater financial strain among consumers in Kakuma, which may be contributing to the reduced customer numbers reported by vendors. Fewer customers are likely to impact overall sales volumes and vendor profitability.

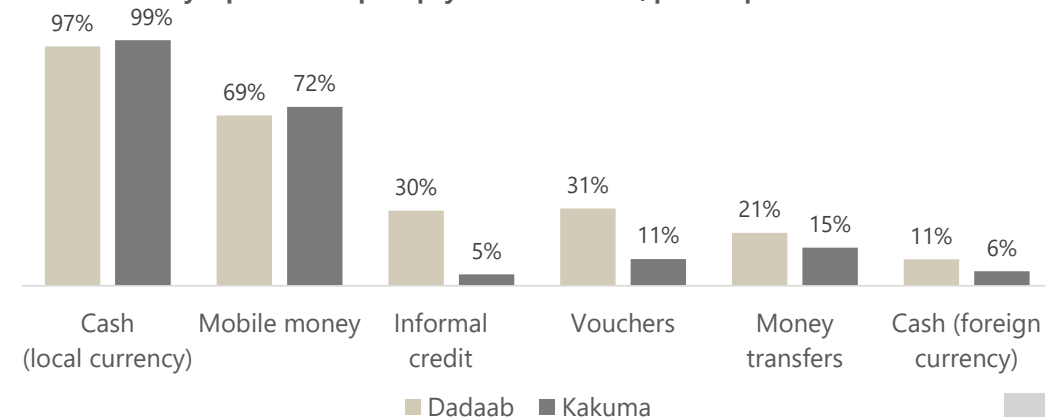
### Most reported financial barriers to accessing the marketplace by customers as perceived by vendors in the 3 months prior to data collection, per camp:<sup>7</sup>



## PAYMENT MODALITIES

The prevalence of mobile money platforms in Kenya provides an alternative payment method to cash strengthening the financial infrastructure within the markets. In Dadaab, informal credit and vouchers (Bamba chakula) were also used as payment by a proportion of the customers.

### Most commonly reported accepted payment modalities, per camp:<sup>7</sup>



### Social barriers

Proportion 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



#### Kakuma



## SECURITY ISSUES

The findings indicate a deterioration in the security situation since the [previous quarter](#). Security issues were more prevalent in Kakuma, where 42% of vendors (up from 16%) reported experiencing threats, compared to 16% in Dadaab (up from 13%), where vendors also reported security challenges negatively affecting their businesses.

In Kakuma, the most commonly reported threats were fear of looting (27%)<sup>7</sup>, followed by fear of robbery (23%)<sup>7</sup> and fear of harassment (18%)<sup>7</sup> highlighting widespread security and mobility challenges.

In Dadaab, the main barriers were fear of robbery (5%)<sup>7</sup> and danger on roads to the marketplace (4%)<sup>7</sup>, reported at much lower levels compared to Kakuma.

## MARKET FUNCTIONALITY SCORE (MFS)<sup>13</sup>, BY CAMP

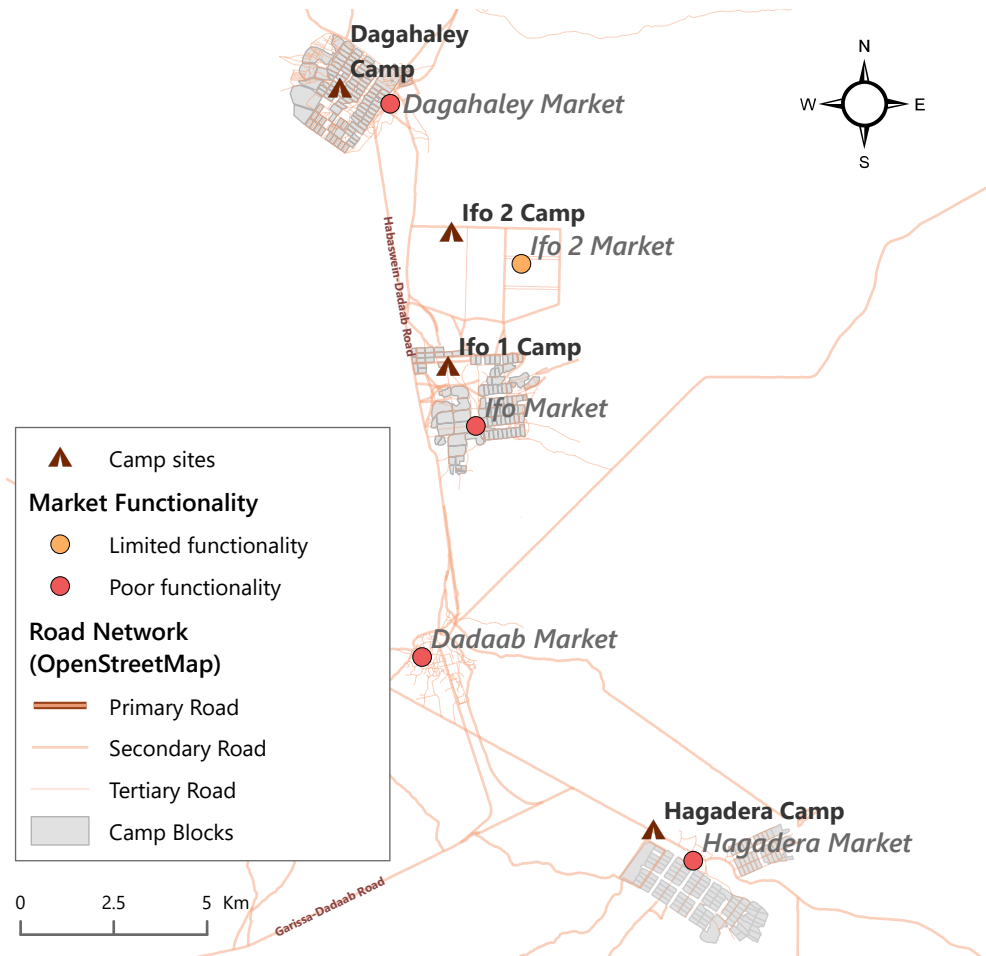


Figure 3: Map of market functionality of assessed markets in Dadaab

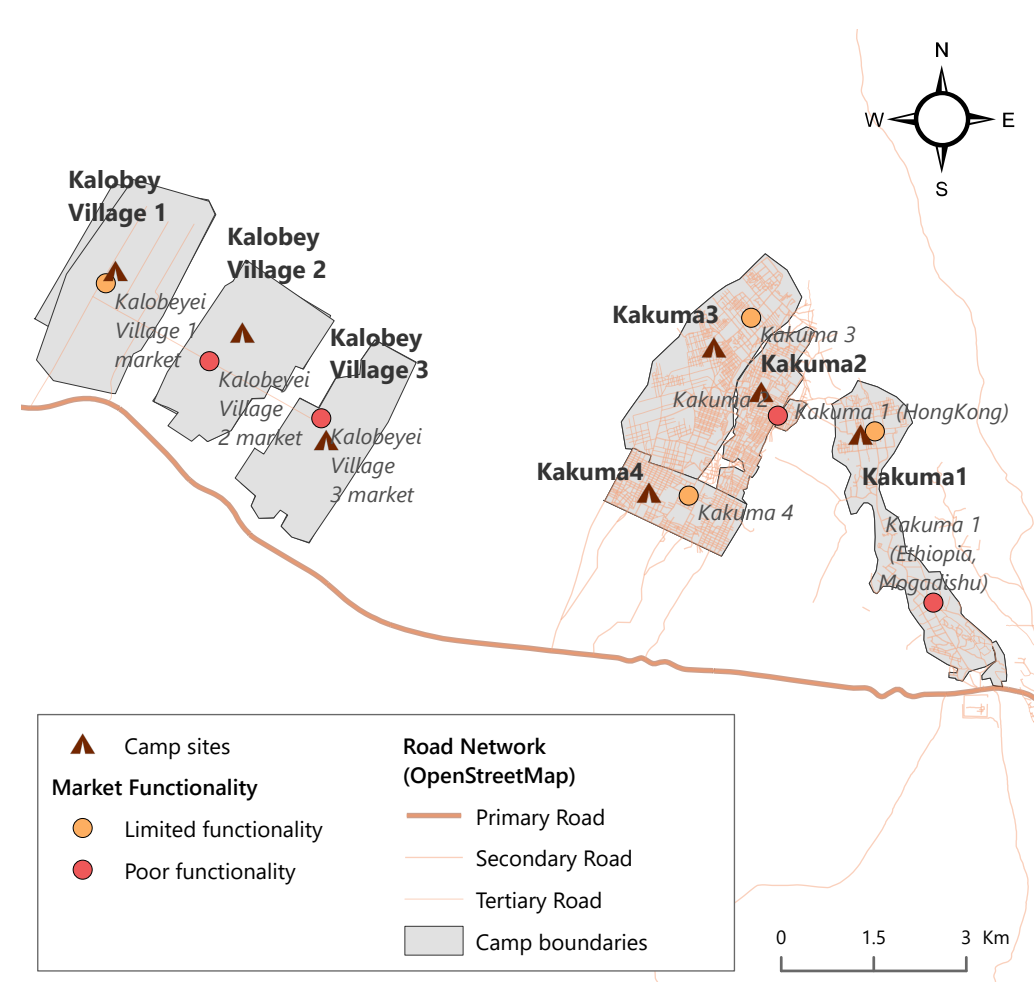


Figure 4: Map of market functionality of assessed markets in Kakuma

The Market Functionality Score (MFS)<sup>13</sup> assesses markets across five key dimensions: accessibility, availability, affordability, resilience, and infrastructure. An analysis of the 13 markets assessed in Q1 2025 revealed that none were fully functional. Only five markets were classified as having limited functionality namely IFO 2 market in Dadaab and four markets in Kakuma (Kakuma 1 - Hong Kong, Kakuma 3, Kakuma 4, and Kalobeyei Village 1). Compared to Q4 2024, IFO and Hagadera deteriorated from limited to poor functionality, while Dagahaley maintained the previous classifications of poor functionality. On the other hand, 2 markets in Kakuma - Kakuma 1 (Ethiopia/Mogadishu) and Kalobeyei Village 2 dropped from limited to poor functionality. IFO 2 market in Dadaab, Kakuma 3 and Kakuma 4 market were the only markets that improved.

While infrastructure scores remained relatively strong, performance on resilience and availability varied across assessed markets. Affordability was the least performing dimension across most markets in both camps. Affordability dimension is influenced by customers' ability to afford core items and predict future costs, while accessibility, reflecting vendors' and customers' ability to reach the market, declined compared to Q4 2024, highlighting an increase in physical and security-related barriers.

## 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 (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 purposive sampling, 382 vendors were interviewed as key informants (196 from Kakuma, 96 from Kalobeyi Integrated Settlement and 122 from Dadaab). The interviews were conducted both face-to-face and remotely with vendors selling food and non-food items for a total of 67 basic food and NFIs. Data collection was conducted from 10<sup>th</sup> to 17<sup>th</sup> April 2025 across 13 markets (5 in Kakuma, 3 in Kalobeyi Integrated Settlement and 5 in Dadaab).

In addition to the core commodities regularly monitored, data on shelter-related items is collected on an annual basis during the first quarter. These items include key household goods such as kitchenware and essential construction materials. This aligns with feedback from stakeholders and partners.

WFP 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 of 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 slight variants of the same product.
- 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.

## Endnotes

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

<sup>2</sup> 1 USD-129.49 KES in March, 2025.

<sup>3</sup> Change since the last round of JMMI data collection in December 2024 (Q4 2024).

<sup>4</sup> National Drought Early Warning Bulletin by NDMA, April 2025.

<sup>5</sup> Kenya Refugee Population by UNHCR, March 2025.

<sup>6</sup> Agricultural Sector Survey by CBK, March 2025.

<sup>7</sup> For multiple answer questions, respondents could select multiple options hence the findings may exceed 100%.

<sup>8</sup> No quarterly price comparison for core commodities monitored on an annual basis including kitchenware, shelter construction items, a few WASH items (i.e., sleeping mats, inner wear, blankets, mosquito nets, toothbrush) and education items (i.e., socks, uniform, school bag, and school shoes).

<sup>9</sup> The total percentages may not add up to 100% due to rounding up or respondents choosing "I do not know" or indicating "complete unavailability of commodity."

<sup>10</sup> 2024 Gross County Product by KNBS, December 2024.

<sup>11</sup> Consumer Price Indices and Inflation Rates, March 2025.

<sup>12</sup> The total percentages may not add up to 100% due to rounding up or respondents choosing "Prefer not to answer"

<sup>13</sup> 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. The markets are categorized into "full functionality", "reduced functionality", "limited functionality", or "poor functionality".

## About the Kenya Cash Working Group

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

## Participating agencies

