

INTRODUCTION

The aim of the Ethiopia JMMI is to provide regular, reliable information on prices and market functionality through the use of harmonized tools and validated analysis. The Ethiopia JMMI is a joint exercise delivered through Ethiopia Collaborative Cash Delivery (CCD) Network members. With uniform methodology, CCD members collect data from their respective areas of operation on a voluntary basis and is reviewed and validated by all JMMI Taskforce members (Please refer to Annex 1 on page 6 of this factsheet for more details regarding the JMMI taskforce). The geographical coverage of the exercise depends on the access of CCD members to priority areas of the country and their ability to collect data from these areas consistently. 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.

Information is collected via key informant interviews (KIIs) with retail vendors in markets frequented by average households. For commodity prices and stock levels, the median prices/stock levels are calculated for each item within each assessed woreda. National and regional medians are calculated by a second median across all of the woreda-level medians calculated across the country or region. Data for this JMMI round was collected between 6 and 17 September 2021 and is strictly indicative.²

For more information on the methodology, please refer to the methodology section in Annex 1 on page 6.

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

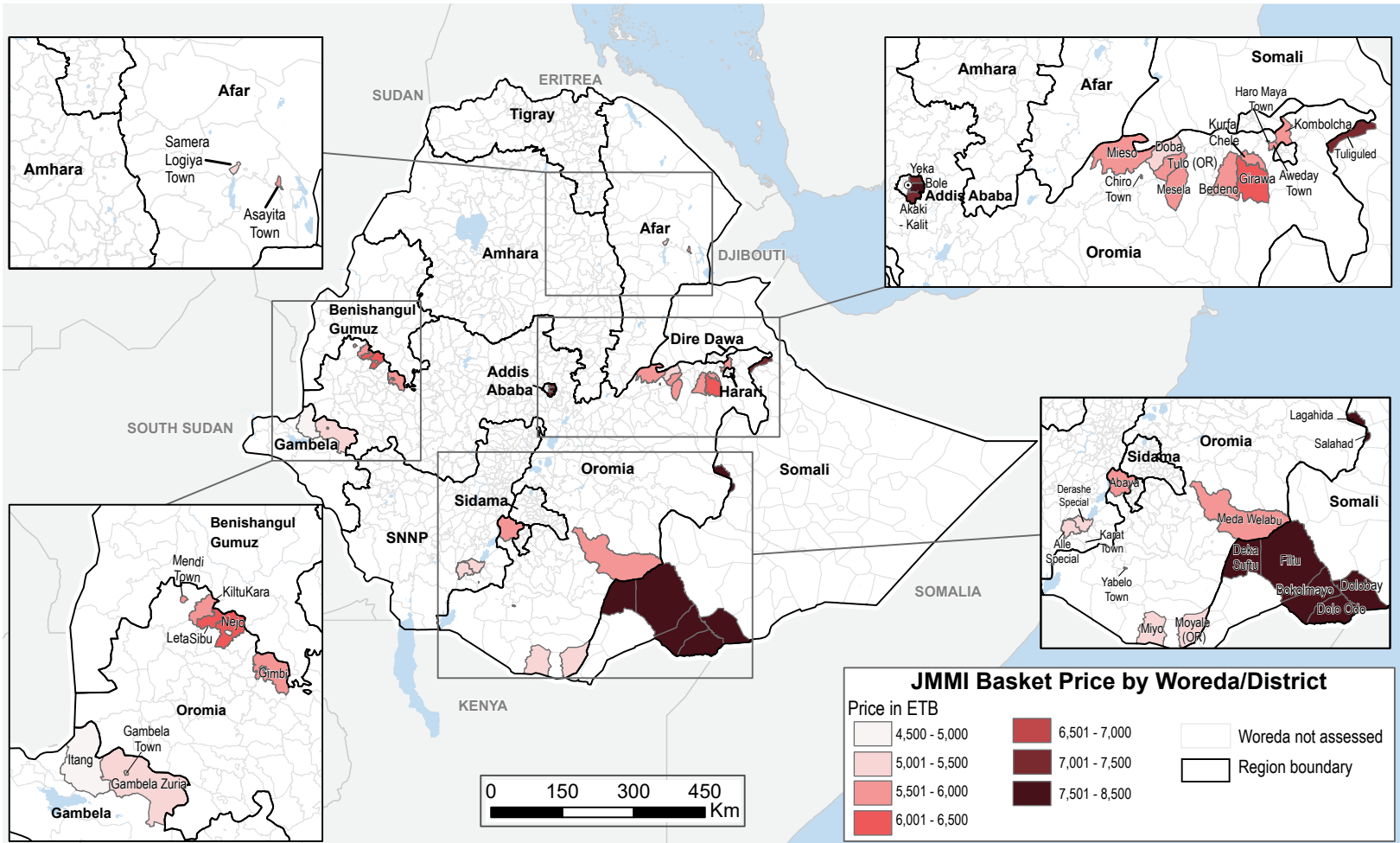
2. Some data collected prior to this period has been included in this analysis (December 2020).

Median cost of JMMI basket
6179.90 ETB
139.87 USD¹

Median cost of Food JMMI basket
4769.06 ETB
107.94 USD¹

- 10 participating agencies
- 40 assessed woredas
- 108 assessed marketplaces
- 232 KIIs with vendors
- 15 commodities assessed

ASSESSED WOREDAS, SEPTEMBER 2021



ETHIOPIA JMMI BASKET CONTENTS

JMMI Food Basket

Cereals and root crops	72 kg	Cooking oil	5.86 L
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Meat	2.7 kg	Vegetables	18 kg
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Full JMMI Basket

Bath soap	3x 125 g bars	Trucked water ³	2700 L
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Bleach	32x 4 g sachets
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The JMMI basket is a selection of food and hygiene items that represents some of the core monthly expenditures incurred by an Ethiopian household (6 persons) in an average month (30 days). It is designed to incorporate a different set of four staple crops in each region in order to reflect consumption patterns in that region. While the JMMI Basket is based in part on the Ethiopia Cash Working Group's Minimum Expenditure Basket (MEB) for the Somali region,⁴ it is not itself a MEB 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.

Assumptions:

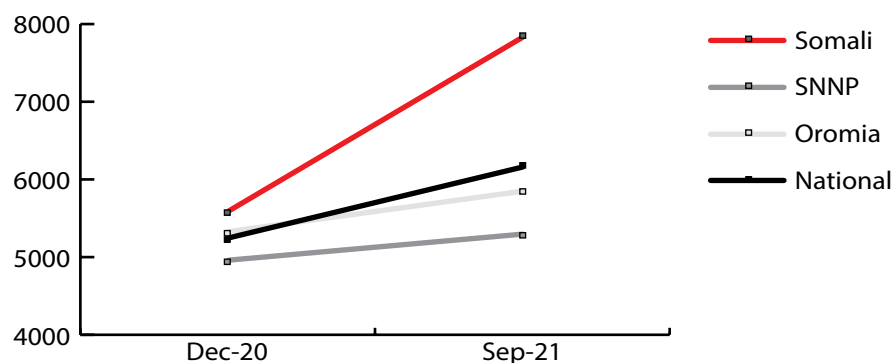
1. The meat component is equally distributed among beef, goat, and mutton (0.9 kg each).
2. When calculating the national-level JMMI basket, the cereal and root crop component is equally distributed among all six staple cereals and root crops monitored (12 kg each). At regional, zone, and woreda levels, this component is equally distributed among the four specific staple cereals and/or root crops included in the basket for each region (18 kg each). KIs were queried about the cereal prices relative to their region as follows:

Maize, sorghum, teff, wheat	Addis Ababa, Oromia, Gambela
Maize, sorghum, wheat, rice	Somali
Maize, teff, barley	SNNP ⁵
Maize, sorghum, teff, barley	Afar

USD/ETB buy rate¹

44.184 ETB

NATIONAL AND REGIONAL JMMI BASKET PRICE (ETB)



3. Water amount was determined using the minimum *Sphere standards* for water (15 L per person per day).

4. *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).

5. Southern Nations, Nationalities and Peoples' Region

MEDIAN JMMI BASKET PRICE AT TIME OF INTERVIEW AT REGIONAL LEVEL

Region	JMMI basket in ETB	JMMI basket in USD
Addis Ababa	7400.27	167.49
Afar	5547.03	125.54
Gambela	4999.79	113.16
Oromia	5845.71	132.30
SNNP ⁵	5284.74	119.61
Somali	7841.71	177.48

Change since Dec. round	JMMI basket (Dec.) in ETB	JMMI basket (Dec.) in USD
N/A	N/A	N/A
N/A	N/A	N/A
N/A	N/A	N/A
▲ 10 %	5311.58	140.05
▲ 7 %	4945.35	130.4
▲ 40 %	5596.8	147.58

Median cost of JMMI basket

6179.90 ETB

139.87 USD¹

▲ 949 ETB 18%

Median cost of JMMI food basket

4769.06 ETB

107.94 USD¹

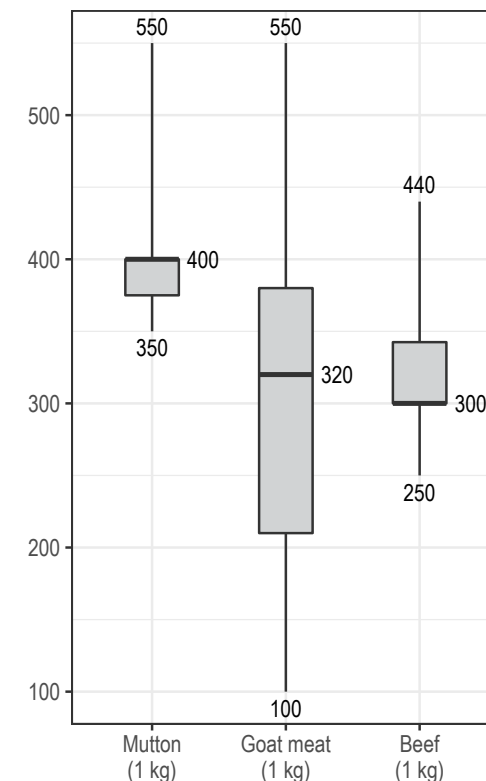
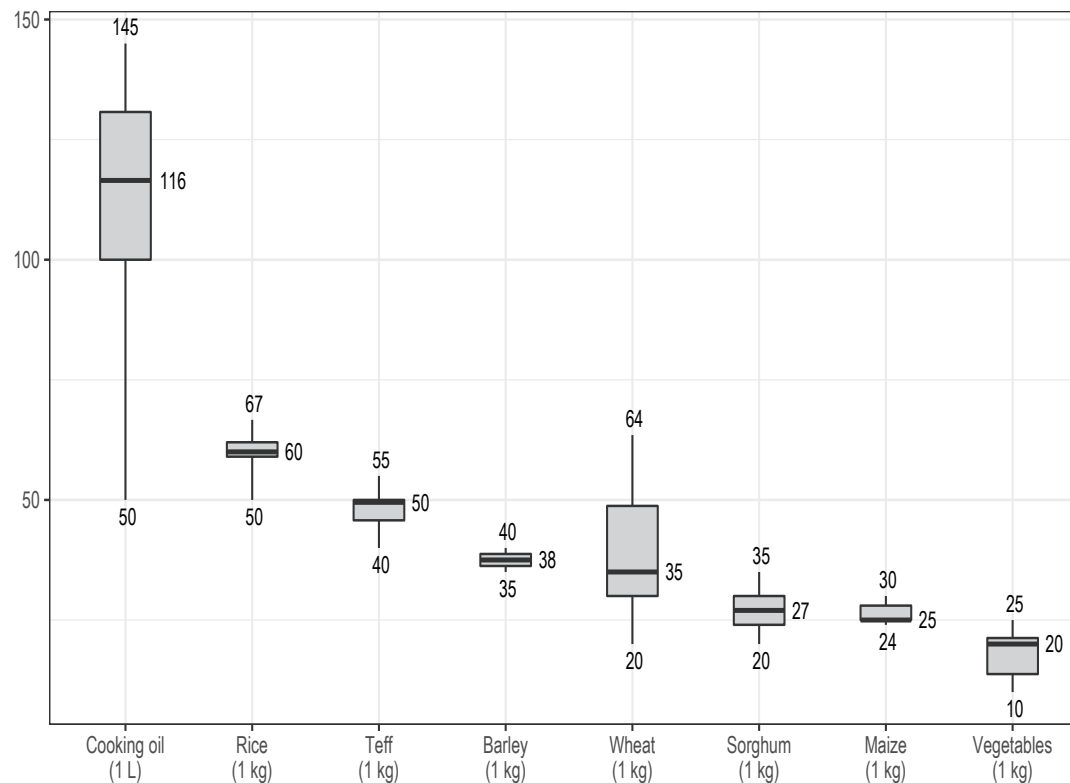
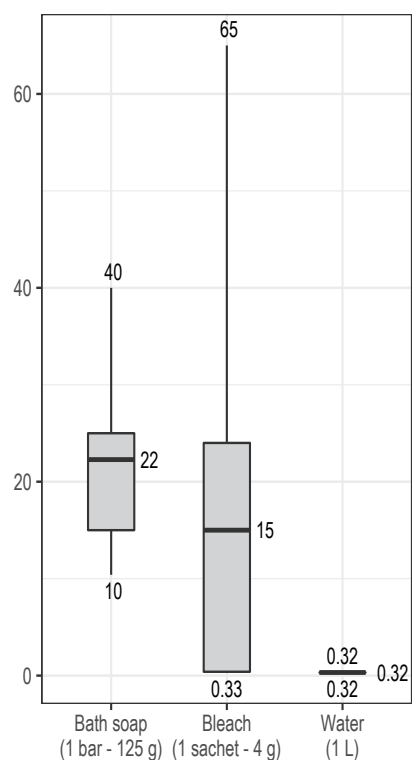
▲ 1072 ETB 29%

NATIONWIDE MEDIAN ITEM PRICES AT TIME OF INTERVIEW

Item	Unit	Price in ETB	Price in USD
Food Items			
Maize	1 kg	25	0.57
Sorghum	1 kg	27	0.61
Teff	1 kg	50	1.13
Wheat	1 kg	35	0.79
Barley	1 kg	38	0.85
Rice	1 kg	60	1.36
Beef	1 kg	300	6.79
Mutton	1 kg	400	9.05
Goat meat	1 kg	320	7.24
Leafy vegetables	1 kg	20	0.51
Cooking oil	1 L	117	2.64
Hygiene Items			
Water	1 L	0	0.01
Bath soap	1 bar	22	0.50
Bleach	4 grams	15	0.34

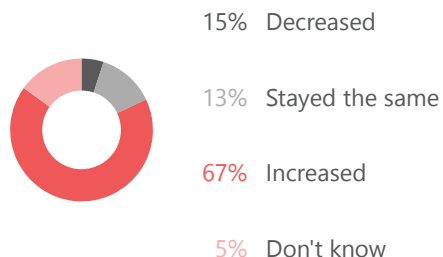
Change since December round	Price (Dec.) in ETB	Price (Dec.) in USD
Food Items		
▲ 85%	13.5	0.36
▲ 65%	16.6	0.44
▲ 20%	41.5	1.09
▲ 54%	22.75	0.6
▲ 88%	20	0.53
▲ 100%	30	0.79
▲ 7%	280	7.38
▲ 38%	290	7.65
▲ 10%	290	7.65
▼ 36%	35	0.92
▲ 71%	68	1.79
Hygiene Items		
▼ 15%	0.38	0.006
▲ 86%	12	0.32
▼ 0%	15	0.01

PRICE VARIATIONS FOR JMMI BASKET ITEMS



REPORTED PREDICTED CHANGE IN PRICE OF FOOD ITEMS

% of vendors reporting predicted price changes for food items in the 30 days after data collection:⁶

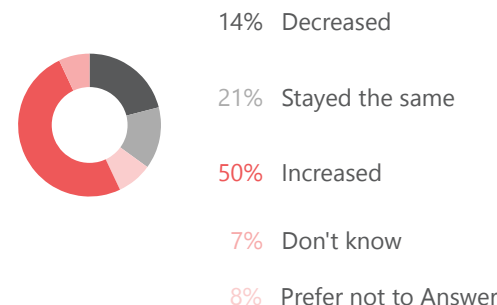


Out of those vendors predicting an increase in food prices, the most frequently cited reasons were:⁷

- 1 67% Rising exchange rate
- 2 42% Increased demand
- 3 29% Customers will run out of items

REPORTED PREDICTED CHANGE IN PRICE OF HYGIENE ITEMS

% of vendors reporting predicted price changes for hygiene items in the 30 days after data collection:⁶



Out of those vendors predicting an increase in hygiene item prices, the most frequently cited reasons were:⁷

- 1 50% Rising exchange rate
- 2 42% Increased demand
- 3 25% Customers will run out of items⁸

6. Percentages in this category do not add up to 100% due to rounding

7. Percentages in this category do not add up to 100% because vendors were able to select multiple answers.

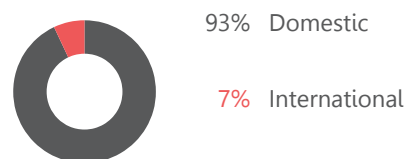
8. Worsening road conditions were also named by 17% of vendors as a reason for a price increase for hygiene items.



LOCATION OF MAIN SUPPLIERS FOR FOOD AND HYGIENE ITEMS

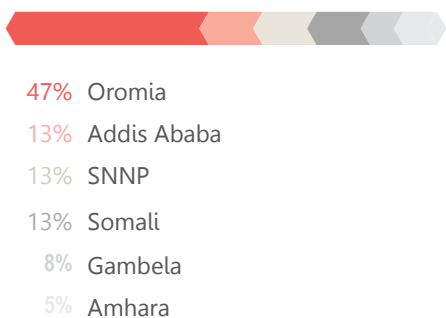
40% of vendors reported that their supplier of food items is located in the same woreda as them.

Proportion of vendors whose supplier is located in the same woreda by reported origin of their suppliers' food items:



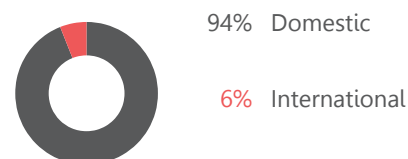
60% of vendors reported that their supplier of food items is not located in the same woreda as them.

For vendors whose supplier is not located in the same woreda, most commonly reported regions where their suppliers' food items are sourced:



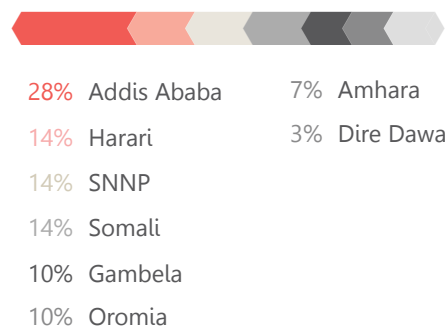
50% of vendors reported that their supplier of hygiene items is located in the same woreda as them.

Proportion of vendors whose supplier is located in the same woreda by reported origin of their suppliers' hygiene items:



50% of vendors reported that their supplier of hygiene items is not located in the same woreda as them.

For vendors whose supplier is not located in the same woreda, most commonly reported regions where their suppliers' hygiene items are sourced:



9. Other was also reported 50% by Kils.

10. Sorghum and wheat were also reported by 5% of vendors as difficult to restock.

DIFFICULTIES TO MEET DEMAND AND TO TRANSPORT OR PROCURE SUPPLIES

43% of vendors reported facing difficulties obtaining enough food items to meet demand in the 30 days prior to data collection.

The three most frequently cited reasons were:⁷

- 1 50% Domestic transport restrictions
- 2 25% Not enough money
- 3 25% The suppliers I usually deal with have been unable to meet my customers' demand

The following food items were the most frequently reported as difficult to restock and obtain in the 30 days prior to data collection:¹⁰

- 1 13% Teff
- 2 10% Maize
- 3 10% Rice

33% of vendors reported facing difficulties obtaining enough hygiene items to meet demand in the 30 days prior to data collection.

The three most frequently cited reasons were:⁷

- 1 100% Domestic transport restrictions
- 2 50% The suppliers I usually deal with have been unable to meet my customers' demand
- 3 50% Not enough money⁹

The following hygiene items were the most frequently reported as difficult to restock and obtain in the 30 days prior to data collection:⁷

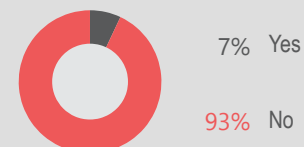
- 1 100% Bath soap
- 2 100% Bleach

BARRIERS TO MARKET ACCESS FOR CONSUMERS

Consumer groups reported to have the most difficulty accessing marketplaces in the 30 days prior to data collection, either due to movement restrictions or due to fear of catching COVID-19:⁷

- 1 33% Chronically ill
- 2 30% Elderly
- 3 23% Women
- 4 23% Children
- 5 13% Men

Proportion of vendors reporting having observed or heard of safety and security incidents in their marketplace in the 30 days prior to data collection:

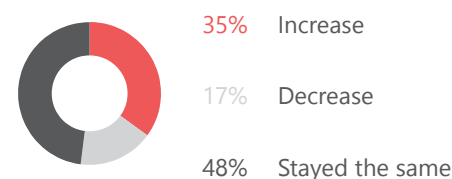


CURRENT AVAILABILITY OF ITEMS FROM SUPPLIERS, AVAILABLE STOCK AND TIME NEEDED TO RESTOCK

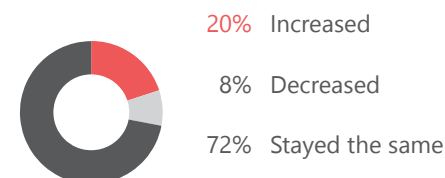
Item	Available (% KIs)	Limited (% KIs)	None (% KIs)	Item ¹²	Stock available for (days)	Restock in (days)
Food Items¹¹				Food Items		
Maize	63%	35%	3%	Maize	13	7
Sorghum	48%	35%	18%	Sorghum	15	7
Teff	53%	33%	13%	Teff	15	10
Wheat	53%	28%	18%	Wheat	11	7
Barley	28%	38%	20%	Barley	23	4
Rice	68%	20%	10%	Rice	13	7
Beef	58%	18%	20%	Beef	2	2
Mutton	28%	35%	20%	Mutton	1	2
Goat meat	50%	20%	23%	Goat meat	1	3
Leafy vegetables	45%	25%	10%	Leafy vegetables	4	2
Cooking oil	73%	13%	8%	Cooking oil	12	6
Hygiene items				Hygiene items		
Water	27%	30%	20%	Water	N/A	N/A
Bath soap	93%	7%	0%	Bath soap	20	2
Bleach	40%	30%	10%	Bleach	18	1

CHANGE IN NUMBER OF CUSTOMERS AND VENDORS

Proportion of vendors reporting on changes in the number of customers coming to their shop as compared to 30 days prior to data collection:



Proportion of KIs reporting changes in the number of active traders in their marketplace as compared to 30 days prior to data collection.



TYPES OF PAYMENT MODALITIES AVAILABLE TO CONSUMERS

Proportion of vendors reporting accepting different types of payment in the 30 days prior to data collection:⁸

- 1 100% Cash (ETB)
- 2 12% Informal credit
- 3 10% Mobile money
- 4 5% Money transfer

11. Some of the percentages in this list may not add up to 100% either due to rounding or because there is no data for some locations.

12. Red numbers in this table flag restocking times that exceed the time that current stocks will last, thus indicating likely shortages.

About the Ethiopia JMMI and Ethiopia CCD

The Ethiopia JMMI is a joint initiative managed through Ethiopia CCD and in close collaboration with its 14 member organizations.

The Ethiopia CCD was mandated in 2018 with funding from the European Commission's Humanitarian Aid Office (ECHO) to form a consortium testing an operational model to improve the efficiency and quality of CVA in Ethiopia through close, ongoing collaboration and harmonisation among cash actors.

In 2021, with funding from the European Union, the Ethiopia JMMI has been relaunched and consolidated in order to improve access to timely and accurate regional and nationwide data to inform the Ethiopia Cash response, through providing evolutions in prices, market functionality and supply chains.

Data collection for the Ethiopia JMMI is a joint exercise managed through Ethiopia CCD and in close collaboration with its members, who collect data from their respective areas of operation on a voluntary basis. To ensure activities are implemented with full consultation and buy-in and are to the benefit of CCD members, a JMMI Taskforce was formed in May 2020 to serve as the decision-making body guiding the initiative. The taskforce counts all partner organisations contributing to the initiative as members.

The JMMI Taskforce has agreed to adopt a common approach toward the key pillars of the initiative, such as methodology, data collection tools, item list, coverage, visibility, and ownership of data. The objectives of the Taskforce are to support the design and successful implementation of the JMMI and any further JMMI projects launched in Ethiopia, to develop an evidence base for the wider use of CVA, and to facilitate discussions of changes in critical market dynamics, which are an integral part of cash feasibility considerations.

Challenges & Limitations

- Partners were unable to collect data from the following regions of Ethiopia in this data collection round: Dire Dawa, Sidama, Harari, Benishangul Gumuz and Tigray.
- The JMMI methodology specifies three prices are collected per commodity, per woreda. For this round of data collection, there were less than three prices collected per commodity, per woreda for all commodities.*
- All findings are indicative and not statistically representative at any level.

*Those regions were: Afar-barley, beef, mutton, goat meat, vegetable leafy darkgreen, cooking oil, water, sorghum; Oromia-mutton, vegetable leafy darkgreen; Somali-beef, mutton, goat meat; SNNP-teff, barley, beef, mutton, goat meat, vegetable leafy darkgreen, bleach, water, maize, sorghum; Gambela-water.

JMMI Partners

- ACF - Action contre le Faim¹³
- CARE¹³
- Concern¹³
- CRS - Catholic Relief Services¹³
- DCA - DanChurchAid¹³
- DRC - Danish Refugee Council¹³
- GOAL¹³
- IRC - International Rescue Committee¹³
- Mercy Corps
- NRC
- Oxfam
- SCI - Save the Children¹³
- WVI - World Vision International¹³

13. These JMMI partners participated in the September 2021 data collection.

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 marketplace(s) devoted to retail are prioritized for data collection, with expansion to rural areas dependent on the availability of contributing partners with capacity in such locations. For the purposes of the Ethiopia JMMI, a marketplace is defined as an area with a relatively sizable concentration of traders in close proximity to each other. This definition is designed to encompass a wide variety of marketplaces and to enable each organization to make judgments about the most valuable ones to monitor based on local realities.

Within each target marketplace, field teams are responsible for identifying a sufficient number of traders to interview who sell directly to consumers, who sell at least one item of that region's JMMI Basket (preferably, they will sell as many of these items as possible) 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 key informant 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;
- For commodity prices and stock levels, prices/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 taking a second median across all of the woreda-level medians calculated across the country or across the region.
- 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.

Further methodological details can be accessed in the

Data collection for this round took place between 6 and 17 September 2021. 10 out of 14 of the JMMI partners conducted a total of 232 KIIs. This first round covered 108 marketplaces, which were sampled by partners nationwide based on their access and existing areas of intervention. This includes markets in 40 out of 1040 woredas in Ethiopia.



Funded by
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