Dadaab and Kakuma Refugee Camp in Kenya | Joint Market Monitoring Initiative (JMMI)

Q1 (January - March, 2024)

MARKET OVERVIEW

INTRODUCTION

The Kenya Cash Working Group (KCWG), through the Minimum Expenditure Basket (MEB)[1] work stream in January 2023, launched the JMMI for refugee camps in Kenya in an effort to understand the degree to which the refugee camps' (Dadaab and Kakuma) markets are functional, integrated, and responsive to the needs of refugees.

Kenya hosts approximately 665,680 refugees and asylum seekers in the Dadaab and Kakuma camps.[2] Both counties that host these refugee camps, Turkana and Garissa, have recorded positive impacts, such as vegetation regeneration and an improved drought classification to "normal."[3] Additionally, enhanced agricultural production is expected to increase food accessibility and lower the prices of food commodities.

There are concerns regarding the ongoing March to May 2024 "long rains" season. The predicted above-average rainfall is expected to cause flash floods, infrastructure damage, livestock losses, and restricted road access, which could potentially disrupt supply chains.[4]

Q1 2024 REFUGEE CAMP COVERAGE

296	Vendors interviewed
67	Commodities assessed
15	Markets assessed
5	Participating agencies
2	Camps assessed

KEY INDICATORS

Cost of Food MEB[1]	Cost of Non Food MEB[1]	Cost of MEB[1]
13,028 KES	4,844 KES	17,871 KES
88.62 USD[5]	32.95 USD[5]	121.56 USD[5]
▼ 484 KES (4%)[6]	▼ 151 KES (3%)[6]	▼ 635 KES (3%)[6]

ASSESSED REFUGEE CAMPS AND MEDIAN MEB VALUES

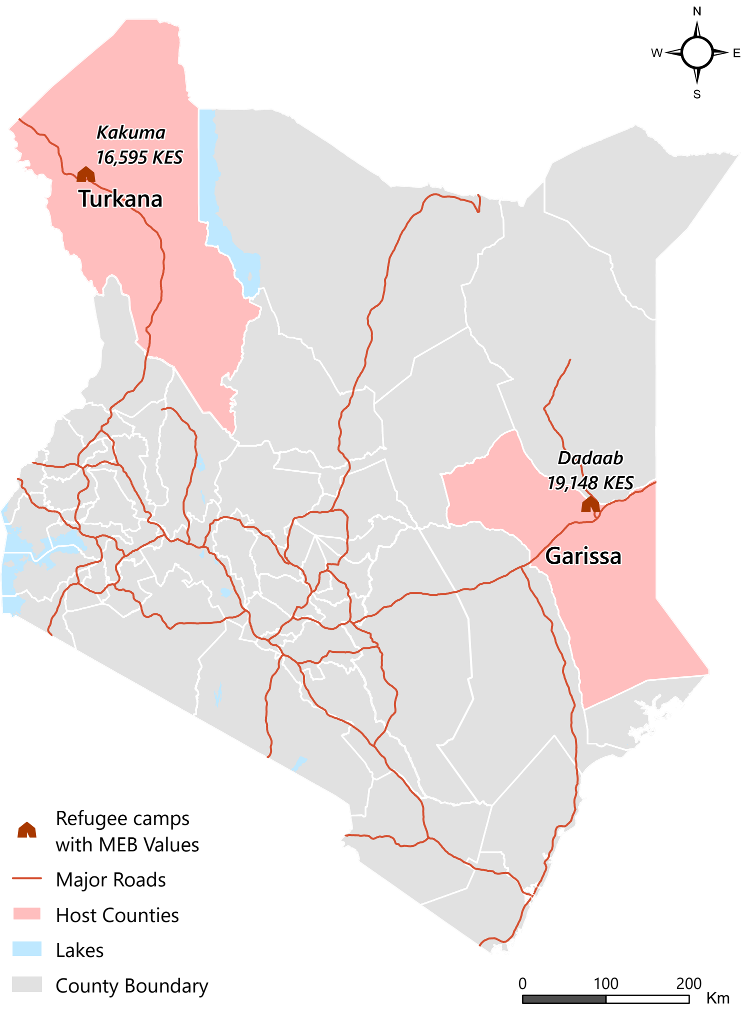


Figure 1: Map on the Q1 2024 assessed refugee camps and MEB vaules

KEY FINDINGS

- The MEB[1] for Dadaab camp was found to be 19,148 KES (a 4% increase when compared to Q4 2023). This rise is likely due to transport disruptions in Garissa County, where Dadaab camp is located. The main route to Garissa faced frequent closures in the first quarter, disrupting supply chain distribution and potentially raising commodity prices.[7] Additionally, vendors had to depend on single suppliers, leading to increased prices and a higher risk of shortages if those suppliers faced commodity shortages.

- The MEB[1] for Kakuma Refugee camp was found to be 16,595 KES. Compared to the last quarter, the MEB decreased by 11%. The decrease in prices in Kakuma can be attributed to the positive impact of the short rains 2023, which led in improving agricultural productivity, increasing the supply of locally produced foods and subsequently reducing prices.

- The market situation in Dadaab and Kakuma camps is varied. While there is a general trend of limited functionality, eight markets are struggling to function effectively, but there are signs of resilience and progress. The Dagahaley market's upgrade to full functionality in Dadaab is a positive development, hinting at recovery despite recent floods. Meanwhile, Ifo and Hagadera markets continue to perform steadily. This assessment underscores the dynamic nature of market functionality in these areas.

KENYA CASH WORKING GROUP

REFUGEE MINIMUM EXPENDITURE BASKET (MEB)

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

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

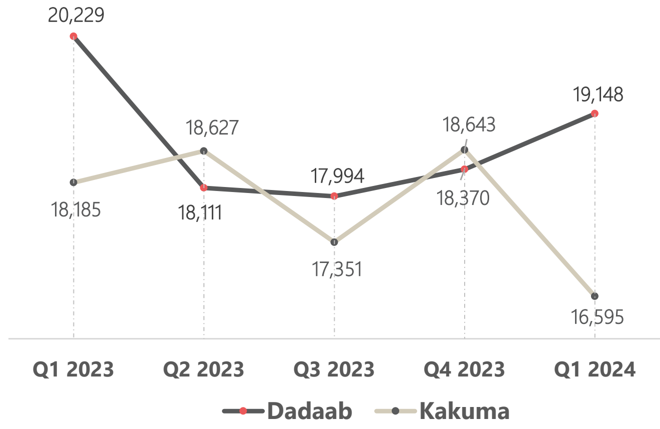
COST OF THE MEB IN KES AND CHANGE SINCE Q4 2023

Camp	Food MEB	Change	NFI MEB	Change	MEB	Change
Dadaab	13,860	▲ 6%	5,288	▲ 1%	19,148	▲ 4%
Kakuma	12,195	▼ 12%	4,400	▼ 7%	16,595	▼11%

Compared to the last quarter, the MEB for Dadaab was found to have increased (+4%). This was likely due to the supply disruptions. Garissa county, host to Dadaab camp, was negatively impacted by the El Niño induced rainfall such as damaged roads.[7]

The Kakuma MEB decreased (-11%), marking the largest drop in the past year. The price reduction can be attributed to the positive impact of the short rains in 2023, which boosted agricultural productivity which subsequently drove down prices.[8]

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



MEB REFUGEE COMPONENTS:[9]

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

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

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

• Jiko is a cooking stove commonly used in Kenya.

MEDIAN PRICE IN KES AND CHANGE BETWEEN Q4 2023 AND Q1 2024 IN PRICES OF ITEMS PER CAMP

Items	Unit	Dadaab	Change [6]	Kakuma	Change
Food items					
White maize	1kg	70	▼ 18%	60	▼ 25%
Maize flour	1kg	113	▲ 12%	90	▼ 10%
Wheat flour	1kg	120	▲ 14%	100	0%
Rice	1kg	130	▲ 8%	150	0%
Spaghetti	500g	83	▼ 8%	80	▼ 11%
Beans	1kg	140	▼ 12%	200	0%
Cowpeas	1kg	115	▼ 54%	155	▼ 22%
Cowpeas leaves	1kg		*	100	0%
Yellow split peas	1kg	100	0%	150	0%
Sugar	1kg	150	▲ 17%	180	▼ 18%
Vegetable oil	1lt	250	0%	250	▼ 14%
Salt	200g	50	0%	50	▲ 25%
Cattle milk	1lt	209	▲ 16%	80	▼ 50%
Camel milk	1lt	210	▲ 17%	200	0%
Goat meat	1kg	800	0%	700	0%
Camel meat	1kg	625	▲ 4%	600	0%
Onions	1kg	170	▼ 15%	180	▲ 12%
Tomatoes	1kg	65	▼ 7%	110	▼ 15%
Kale	1kg	100	0%	100	0%
WASH items					
Sleeping mat	1pc	250	▼ 50%	800	▲ 10%
Mosquito net	1pc	400	0%	1,200	▲ 55%
Tooth paste	50g	100	0%	100	0%
Tissue paper	1pc	100	0%	30	0%
Bar soap	200g	50	0%	50	0%
Jerry can	1pc	150	0%	150	▼ 25%
Bucket	1pc	160	▲ 7%	100	▼ 33%
Pads	1pc	100	0%	100	0%
Toothbrush	1pc	50	0%	50	▲ 67%
Inner wear for girls	1pc	200	▲ 33%	200	0%
Inner wear for female adults	1pc	250	▲ 25%	250	0%
Blanket	1pc	160	▲ 7%	100	▼ 33%
Cooking energy items					
Firewood	1 bundle	100	▼ 33%	50	▼ 67%
Charcoal	2kg	129	▼ 36%	50	▼ 50%
Matchbox	2pc	5	0%	5	0%

Items	Unit	Dadaab	Change [6]	Kakuma	Change
Education items					
Shoes (< five years boys/girls)	1pair	370	▼ 51%	200	▼ 2%
Shoes (5-12 years boys/girls)	1pair	650	▼ 35%	500	▲ 5%
Uniform girls	1pair	1,890	▲ 26%	800	▼ 6%
Uniform boys	1pair	1,300	▲ 8%	800	0%
Pencils	1pc	10	0%	10	0%
Pens	1pc	20	0%	18	▼ 12%
Exercise books	1pc	40	▲ 60%	30	▼ 14%
Rubbers	1pc	10	0%	10	0%
Socks	1pc	100	0%	100	0%
School bag	1pc	625	▲ 4%	650	▲ 8%
Ruler	1pc	30	0%	30	0%
Geometric set	1pc	250	▲ 19%	210	▲ 5%
Sharpener	1pc	10	▼ 33%	10	0%
Kichen Items					
Cooking pans	1pc	1,250	▼ 17%	500	▲ 11%
Knife	1pc	100	0%	100	0%
Spoon	1pc	20	0%	30	▲ 50%
Cup	1pc	100	0%	50	0%
Plate	1pc	150	▲ 50%	150	▲ 50%
Construction items					
Hoop iron	1pc	200	▼ 17%	250	▲ 25%
Tower bolt (4 inches)	1pc	100	▲ 8%	100	▲ 29%
Tower bolt (6 inches)	1pc	200	▲ 33%	150	▼ 17%
Pad bolt	1pc	100	▼ 20%	100	▼ 33%
Butt hinge (2 inches)	1pc	100	▲ 100%	60	▼ 33%
Butt hinge (4 inches)	1pc	200	▲ 100%	85	▼ 15%
Pine timber	1pc	73	▲ 4%	50	0%
Nails (2 inches)	1pc	250	0%	200	0%
Nails (3 inches)	1pc	250	0%	200	0%
Nails (4 inches)	1pc	250	0%	200	0%
Roofing nails	1pc	250	▼ 4%	300	▲ 20%
Sealing nails	1pc	250	▼ 16%	300	▲ 20%
Wood preservative	1pc	100	▼ 67%	500	0%
Eucalyptus	1pc	500	▼ 5%	250	▲ 150%
Corrugated iron sheets	1pc	1,200	▲ 20%	1,000	▲ 5%
Uncorrugated iron sheets	1pc	1,300	▲ 62%	850	▲ 13%
Cement	1pc	1,025	▲ 2%	1,000	0%

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

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

Items[10]	Wide availability (%KIs)	Limited availability (%KIs)	Remaining stock (days)	Time needed to restock (days)
White maize	83%	17%	5	2
Maize flour	92%	0%	8	2
Wheat flour	92%	4%	7	1
Rice	92%	0%	7	1
Spaghetti	92%	0%	8	2
Beans	78%	22%	5	2
Cowpeas	40%	60%	14	3
Cowpeas leaves	*	*	*	*
Yellow split peas	100%	0%	5	1
Sugar	92%	0%	7	2
Vegetable oil	92%	0%	7	2
Salt	91%	4%	8	1
Cattle milk	78%	22%	0	0
Camel milk	89%	11%	1	0
Goat meat	78%	17%	0	0
Camel meat	89%	11%	0	0
Onions	83%	17%	3	2
Tomatoes	88%	12%	2	1
Kale	78%	22%	1	1
Sleeping mat	63%	13%	9	1
Mosquito net	75%	6%	8	1
Tooth paste	83%	17%	10	1
Tissue paper	88%	13%	11	2
Bar soap	92%	0%	7	2
Jerry can	75%	0%	7	1
Bucket	75%	6%	8	1
Pads	72%	28%	11	1
Toothbrush	75%	15%	9	1
Inner wear for girls	44%	44%	13	1
Inner wear for female adults	50%	38%	10	1
Blanket	75%	0%	8	2
Cooking pan	75%	6%	9	2
Knife	81%	6%	6	1
Spoon	75%	0%	10	1
Cup	75%	0%	10	1
Plate	75%	0%	10	1

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

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

Items[10]	Wide availability (%KIs)	Limited availability (%KIs)	Remaining stock (days)	Time needed to restock (days)
White maize	96%	4%	6	1
Maize flour	98%	0%	6	1
Wheat flour	96%	2%	5	1
Rice	100%	0%	7	1
Spaghetti	97%	3%	6	1
Beans	95%	5%	7	1
Cowpeas	58%	38%	4	1
Cowpeas leaves	67%	33%	2	1
Yellow split peas	55%	45%	6	2
Sugar	99%	0%	7	1
Vegetable oil	98%	2%	7	1
Salt	99%	1%	10	1
Cattle milk	91%	9%	5	1
Camel milk	94%	6%	3	1
Goat meat	90%	7%	1	1
Camel meat	92%	5%	1	1
Onions	91%	9%	4	1
Tomatoes	93%	7%	3	1
Kale	87%	13%	2	1
Sleeping mat	83%	17%	15	1
Mosquito net	90%	10%	13	1
Tooth paste	96%	2%	7	1
Tissue paper	93%	7%	7	1
Bar soap	98%	2%	8	1
Jerry can	60%	40%	10	1
Bucket	78%	22%	8	1
Pads	94%	6%	8	1
Toothbrush	100%	0%	10	1
Inner wear for girls	97%	3%	12	2
Inner wear for female adults	93%	7%	14	2
Blanket	76%	24%	8	1
Cooking pan	97%	3%	14	1
Knife	88%	13%	14	1
Spoon	100%	0%	13	1
Cup	93%	7%	14	1
Plate	89%	11%	14	1

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

Items[10]	Wide availability (%KIs)	Limited availability (%KIs)	Remaining stock (days)	Time needed to restock (days)
Shoes (<five years boys/girls)	69%	13%	9	2
Shoes (5-12 years boys/girls)	69%	6%	8	2
Uniform girls	75%	0%	13	1
Uniform boys	75%	0%	7	1
Pencil	91%	0%	12	1
Pen	86%	5%	12	1
Exercise book	79%	8%	13	1
Rubber	71%	21%	11	1
Socks	81%	6%	6	1
School bag	75%	0%	8	1
Ruler	71%	21%	11	1
Geometric set	69%	19%	20	2
Sharpener	75%	0%	15	1
Firewood	83%	11%	6	4
Charcoal	67%	33%	5	3
Matchbox	91%	0%	9	1
Hoop iron	69%	31%	14	3
Tower bolt (4 inches)	71%	29%	15	3
Tower bolt (6 inches)	71%	29%	15	2
Pad bolt	69%	31%	14	2
Butt hinge (2 inches)	71%	29%	10	2
Butt hinge (4 inches)	71%	29%	10	2
Pine timber	64%	36%	15	2
Nails (3 inches)	71%	29%	14	2
Nails (4 inches)	69%	31%	10	2
Nails (2 Inches)	71%	29%	10	2
Roofing nails	71%	29%	15	2
Sealing nails	71%	29%	12	2
Wood preservative	62%	38%	15	2
Eucalyptus/ Blue gum	62%	38%	15	3
Corrugated iron sheet	67%	33%	15	2
Uncorrugated iron sheet	69%	31%	10	2
Cement	67%	33%	15	2

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

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

Items[10]	Wide availability (%KIs)	Limited availability (%KIs)	Remaining stock (days)	Time needed to restock (days)
Shoes (<five years boys/girls)	88%	12%	14	2
Shoes (5-12 years boys/girls)	79%	21%	21	2
Uniform girls	96%	4%	21	1
Uniform boys	96%	4%	20	1
Pencil	100%	0%	15	1
Pen	100%	0%	18	1
Exercise book	90%	10%	17	1
Rubber	97%	3%	15	1
Socks	98%	2%	12	1
School bag	95%	5%	18	1
Ruler	91%	7%	14	1
Geometric set	98%	2%	14	1
Sharpener	96%	4%	8	1
Firewood	91%	9%	3	1
Charcoal	81%	19%	3	1
Matchbox	100%	0%	7	1
Hoop iron	100%	0%	14	1
Tower bolt (4 inches)	79%	21%	14	2
Tower bolt (6 inches)	75%	25%	15	2
Pad bolt	76%	24%	15	1
Butt hinge (2 inches)	89%	11%	14	1
Butt hinge (4 inches)	89%	11%	14	2
Pine timber	67%	28%	15	1
Nails (3 inches)	83%	17%	14	2
Nails (4 inches)	83%	17%	14	2
Nails (2 Inches)	83%	17%	14	2
Roofing nails	82%	18%	14	2
Sealing nails	79%	17%	13	2
Wood preservative	90%	5%	7	1
Eucalyptus/ blue gum	53%	47%	14	2
Corrugated iron sheet	76%	24%	14	2
Uncorrugated iron sheet	79%	21%	14	2
Cement	78%	17%	14	2

MAIN SUPPLY ROUTES

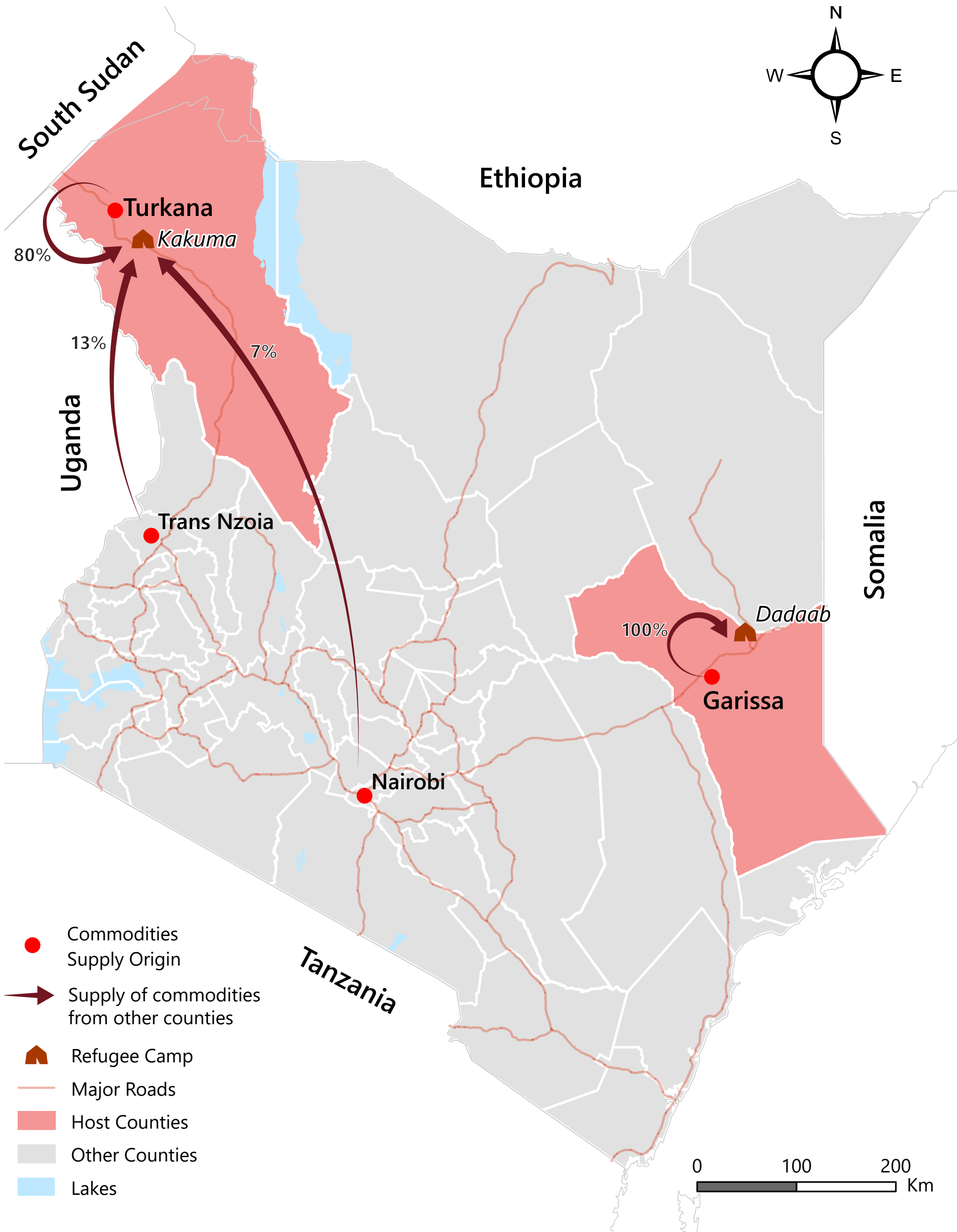


Figure 2: Map of main supply route of assessed refugee camps

LOCATION OF THE MAIN SUPPLIER

Figure 2 presents the supply route map, showing the supply routes of commodities from the main suppliers as reported by the interviewed vendors. These insights into the supply routes are crucial for determining the resilience of markets.

At the time of data collection, all interviewed vendors in Dadaab camp indicated that their main supplier was located within the country, primarily within their respective counties. Additionally, 20% of vendors in Kakuma camp reported sourcing their goods from the neighboring county of Trans Nzoia as well as Nairobi.

Conversely, vendors in Dadaab primarily relied on suppliers within Garissa county. The supply routes deviated from the previous quarter, likely due to the destruction of the main road, which hampered movement from other counties, such as Nairobi County.[7]

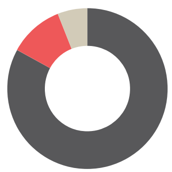
REPORTED PREDICTED CHANGES IN SUPPLIER'S PRICES

The data indicates that a majority of the vendors (83% in both Dadaab and Kakuma) reported that they could predict changes in supplier prices within one month of data collection. The majority expected prices to rise in Dadaab (64%) and Kakuma (77%), possibly due to market accessibility issues and effects of the March to May 2024 long rains. Various factors contribute to changes in prices, including challenges in supply of commodities, transport cost, input cost, weather conditions among other factors.

Additionally, among the vendors who could predict prices (83% in both Dadaab and Kakuma), 28% in Dadaab and 4% in Kakuma expect prices to remain stable. A proportion of the vendors reported that they were unable to predict changes in prices due to price fluctuations and the unavailability of commodities in the market.

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

Dadaab



Yes	83%
No	11%
Do not know	6%

Kakuma

Yes	83%
No	0%
Do not know	17%

Expectation of supplier price changes one month following data collection, by % of vendors (83% in Dadaab and 83% in Kakuma) who reported being able to predict supplier price changes, per camp:

Dadaab 64% ▲ 7% ▼ 28% ●   **Kakuma** 77% ▲ 13% ▼ 4% ●

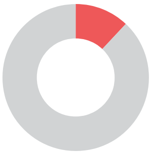
SUPPLIER

Dadaab

Proportion of vendors depending on one supplier for food items.

29%

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



12%

Kakuma

Proportion of vendors depending on one supplier for food items.

4%

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

3%

Garissa County, host to Dadaab refugee camp experienced disruptions in its transport system, potentially affecting the delivery of commodities. This issue is evident in the higher proportion of vendors in Dadaab relying on a single supplier compared to those in Kakuma. Vendors who rely on a sole supplier are vulnerable to supply disruptions, which may arise from having limited alternative options.

ACCESS TO A LOCKED, SECURED STORAGE FACILITY

The majority of vendors (99% in Dadaab, 95% in Kakuma) had access to a locked secured storage facility for their commodities. These businesses may be less vulnerable to theft or vandalism, which could impact their profitability. Of the remaining vendors without a storage facility, 4% in Kakuma and 1% in Dadaab reported complete lack of a storage facility, which likely hinders the vendors ability to maintain adequate stock and limit product offerings.

Proportion of vendors reporting on access to a locked, secured storage facility in the 3 months prior to data collection, per camp:[11]

Dadaab

94%	Yes, within my own business facilities
3%	Yes, elsewhere within the market place
2%	No, I store goods at my home
1%	No storage facility

Kakuma

63%	Yes, within my own business facilities
22%	Yes, elsewhere within the market place
6%	No, I store goods at my home
4%	No storage facility
3%	No, storage outside the marketplace at another facility

VENDOR CHALLENGES

Most reported challenges by vendors in the 3 months prior to data collection, per camp:[12]

Dadaab

1. 33% Price increase by the supplier
2. 14% Limited access to wholesale
3. 12% Lack of funds to restock
4. 7% High transport costs

Kakuma

1. 73% Lack of funds to restock
2. 49% Price increase by the supplier
3. 18% Customer reduction
4. 7% Shortage of supply

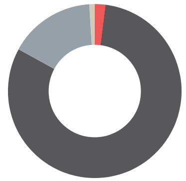
Almost all (98%) vendors in Kakuma reported facing a variety of challenges, with lack of funds to restock (73%)[12] and price increases by the supplier (49%)[12] being the most commonly cited. Meanwhile, 64% of vendors in Dadaab reported challenges, including limited access to wholesalers (14%)[12]. These issues affect vendors' ability to purchase additional stock and compromise the profitability of their businesses.

Nonetheless, the majority of vendors (81%) in Dadaab whereas 56% in Kakuma reported that the number of vendors operating within the marketplace increased compared to three months prior to data collection. An increase in the number of vendors in the market could enhance competition, potentially leading to better prices and more diverse product offerings for consumers.

CHANGE IN THE NUMBER OF VENDORS

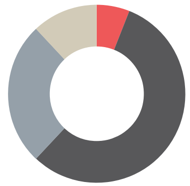
Proportion of vendors reporting on changes in the number of vendors operating in their marketplace in the 3 months prior to data collection, per camp:

Dadaab



Decrease	2%
Increase	81%
No change	16%
Do not know	1%

Kakuma



Decrease	6%
Increase	56%
No change	26%
Do not know	12%

CHANGE IN THE NUMBER OF CUSTOMERS

Among the vendors (77%) interviewed in Dadaab who cited a change in the number of customers buying from their shops in the 3 months prior to data collection, all noted an increase in the number of customers purchasing from their shop. Compared to the previous assessment,[13] a higher proportion of vendors in Dadaab reported an increase in the number of customers. This is likely as a result of markets being more accessible following the flood related barriers from last quarter.

In Kakuma camp, over half (57%) reported a change in the number of customers, with 76% of the 57% reporting an increase while the remaining indicated a decrease in customers. This indicated, majority of the business are experiencing a growth.

DIFFICULTY IN KEEPING THE BUSINESS OPERATIONAL AND WELL-STOCKED

More than half (60%) of the interviewed vendors in Kakuma reported that they faced difficulties in keeping their businesses well stocked. This may be attributed to the higher proportion of vendors (98%) in Kakuma who reported experiencing challenges mainly due to lack of adequate funds to restock.

In Dadaab, the majority (84%) of vendors reported no challenges in keeping their businesses operational and well-stocked in the three months before data collection.

Reported difficulty in keeping the business operational and well-stocked by vendors in the 3 months prior to data collection:[12]

Dadaab

14% Difficulty with price charged by supplier

2% Difficulty with availability of core goods

2% Theft or damage of commodities

1% Difficulty due to movement restrictions

Kakuma

32% Difficulty with price charged by supplier

30% Difficulty with availability of core goods

11% Flooding in the marketplace

8% Difficulty fully staffing the store

SHORTAGE OF COMMODITIES:

More than half (54%) of the interviewed vendors in Kakuma and 39% in Dadaab reported a lack of or limited availability of some commodities. This suggests supply chain challenges faced by vendors and may affect customers' ability to access various commodities. Consistent with previous assessments, the most reported causes of shortages in both Kakuma (42%) and Dadaab (20%) were increased market prices.

Most reported causes of shortage of commodities by vendors (39% in Dadaab, 54% in Kakuma) at the time of data collection, per camp:[12]

Dadaab

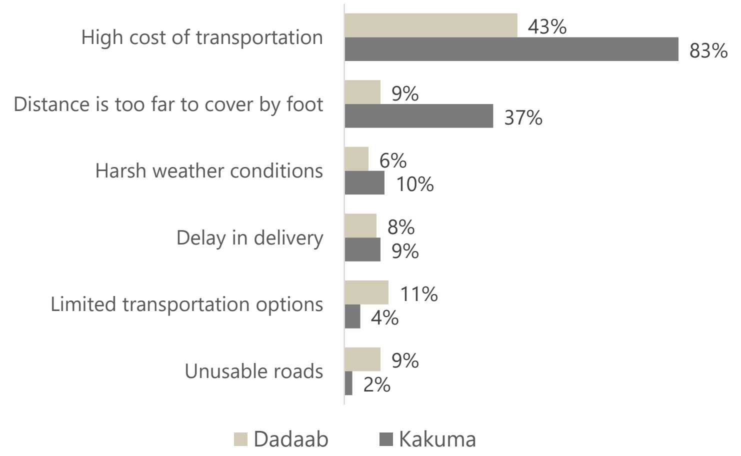
Increased market price	20%
High transportation cost	17%
Low demand for the commodities	14%

Kakuma

Increased market price	42%
Low demand for the commodities	18%
High transportation cost	17%

CHALLENGES FACED WHEN TRANSPORTING COMMODITIES:

Most reported transportation challenges by vendors in the 3 months prior to data collection, per camp:[12]

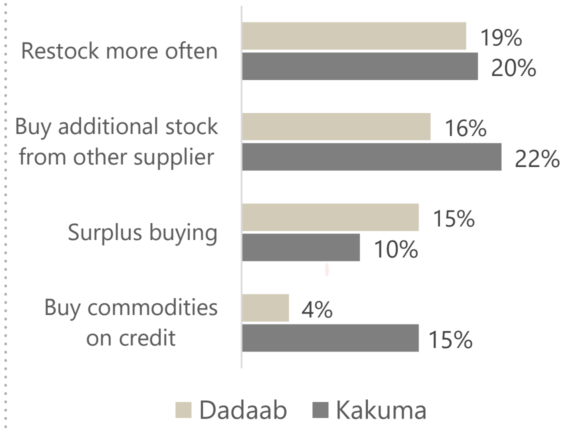


The high cost of transport was reported as a challenge in both camps. This is likely influenced by the cost of fuel which is still high despite the government intervention.[14] The high cost of transport may prompt businesses to pass on the burden to consumers by raising commodity prices. Vendors in Kakuma camp, 20% of whom reported sourcing from suppliers in Trans Nzoia and Nairobi counties, are likely to be significantly affected.

COPING MECHANISMS EMPLOYED TO DEAL WITH SHORTAGE OF COMMODITIES:

Vendors facing commodity shortages in the three months prior to data collection (53%) employed various coping strategies. In Kakuma, nearly a quarter (22%) of the vendors changed their suppliers. Whereas in Dadaab, 19% of the vendors restocked more often, this may be attributed to the lack of suppliers, necessitating more frequent purchases to maintain inventory levels. Additionally, a few (5%) of interviewed vendors did not have any coping mechanisms in place, making them vulnerable to revenue loss and business disruptions in the event of shortages.

Strategies employed by interviewed vendors to address unavailability of commodities at the time of data collection, by % of vendors (39% in Dadaab, 54% in Kakuma) who reported experiencing shortage of some commodities per camp:[12]



BARRIERS TO MARKET ACCESS

Physical barriers

The heavy rains and floods in Oct-Nov-Dec 2023 significantly hindered market access in Dadaab. Close to a third (32%) of vendors reported experiencing difficulties accessing the marketplace in Q4 2023. The primary challenge was market inaccessibility due to flooding. In contrast, only 8% of vendors in Dadaab reported encountering physical challenges in accessing the markets in Q1 2024.

The most common physical barrier reported by vendors in Kakuma was the curfews and movement restrictions imposed by authorities. These measures have been implemented to address ongoing insecurity in Turkana County, which hosts the Kakuma refugee camp, and are expected to remain in effect until the situation stabilizes.[15]

Most reported physical barriers to accessing the marketplace by vendors in the 3 months prior to data collection, per camp: [12]

Dadaab

- **2%** Lack of transportation option
- **1%** Inadequate facilities
- **1%** Limited operating hours of the market
- **5%** Do not know

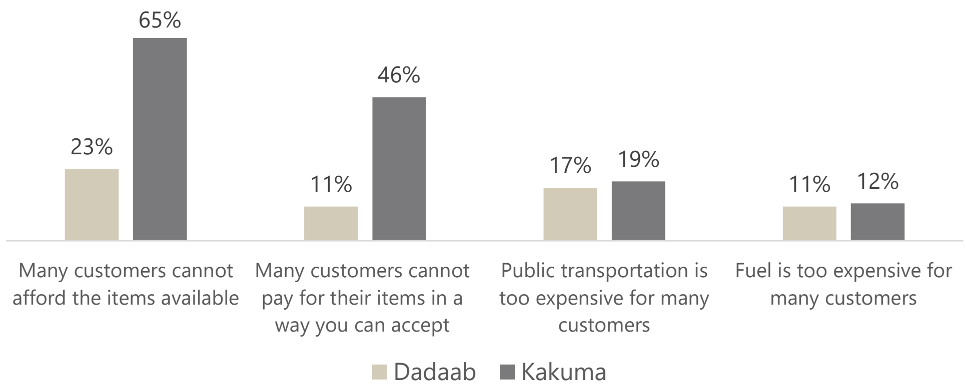
Kakuma

- **17%** Curfew and movement restrictions
- **10%** Inadequate facilities
- **6%** Lack of basic items in the market
- **5%** Limited operating hours of the market

Financial barriers

A significant proportion (91%) of vendors in Kakuma reported that their customers encountered financial difficulties. Notably, 65% of customers in Kakuma could not afford the available items, while 46% faced challenges in paying for their purchases using acceptable payment methods due to insufficient cash and lack of a mobile money account. In Dadaab, a comparatively lower percentage (48%) of customers faced financial challenges according to the interviewed vendors. Affordability was also reported as the main financial challenge faced in Dadaab.

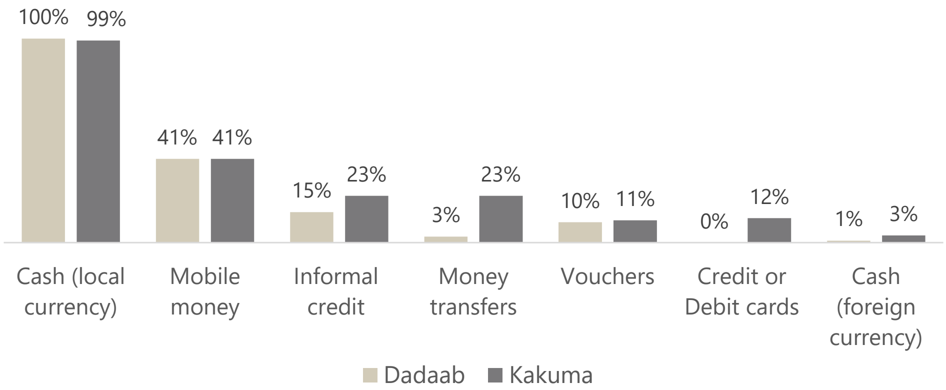
Most reported financial barriers to accessing the marketplace by customers as perceived by vendors in the 3 months prior to data collection, per camp:[12]



PAYMENT MODALITIES:

Similar to Q4 findings, the majority of vendors in both camps used cash and mobile money for payment of commodities. In Dadaab, informal credit and vouchers were also used as payment by a proportion of the customers.

Most commonly reported accepted payment modalities, per camp:[12]



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 majority (93%) of vendors in Dadaab reported that they did not face any security issues negatively impacting their business.

In contrast, slightly over a third (37%) of vendors in Kakuma camp reported experiencing security threats. The most commonly reported security threat was fear of violence, followed by fear of robbery. Kakuma camp is situated in Turkana County, which is one of the counties within the arid and semi-arid lands (ASAL) that is most affected by the resurgence of insecurity.[16]

MARKET FUNCTIONALITY SCORE (MFS), BY CAMP

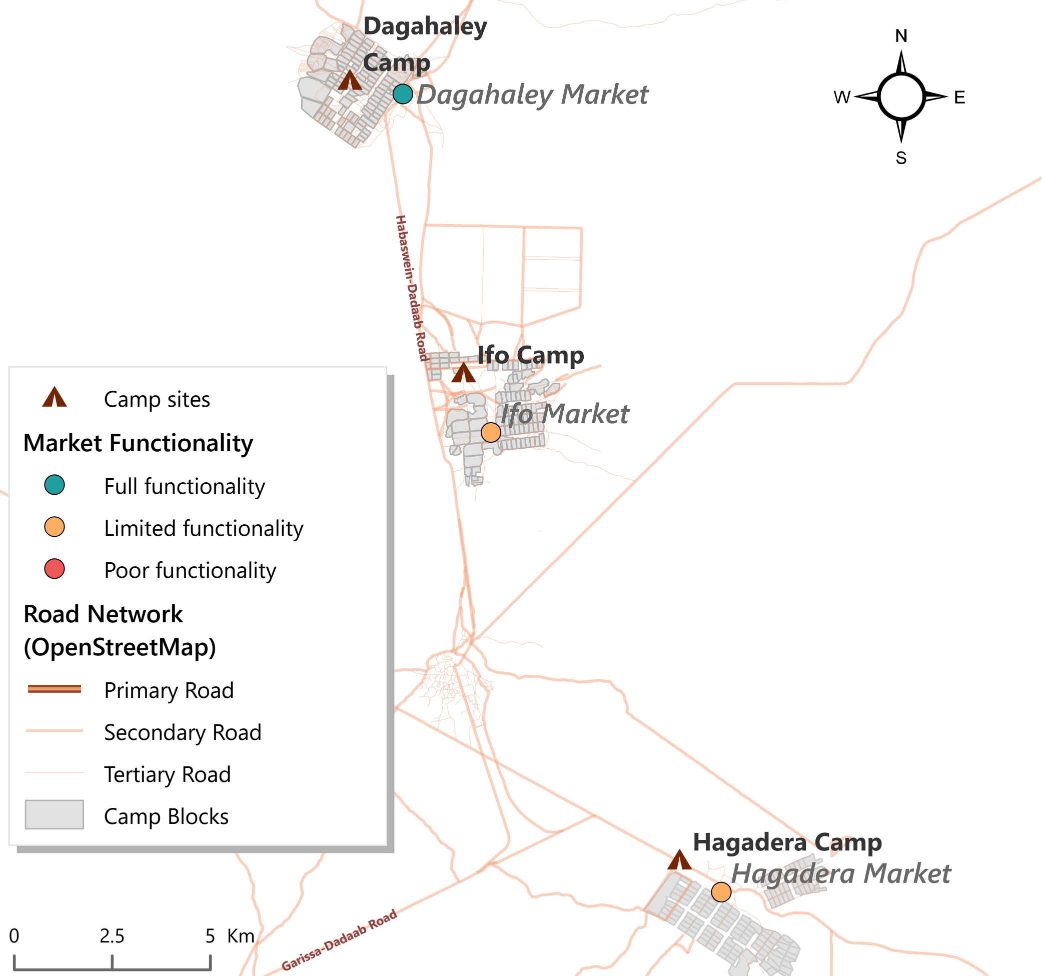


Figure 3: Map of market functionality of assessed markets in Dadaab

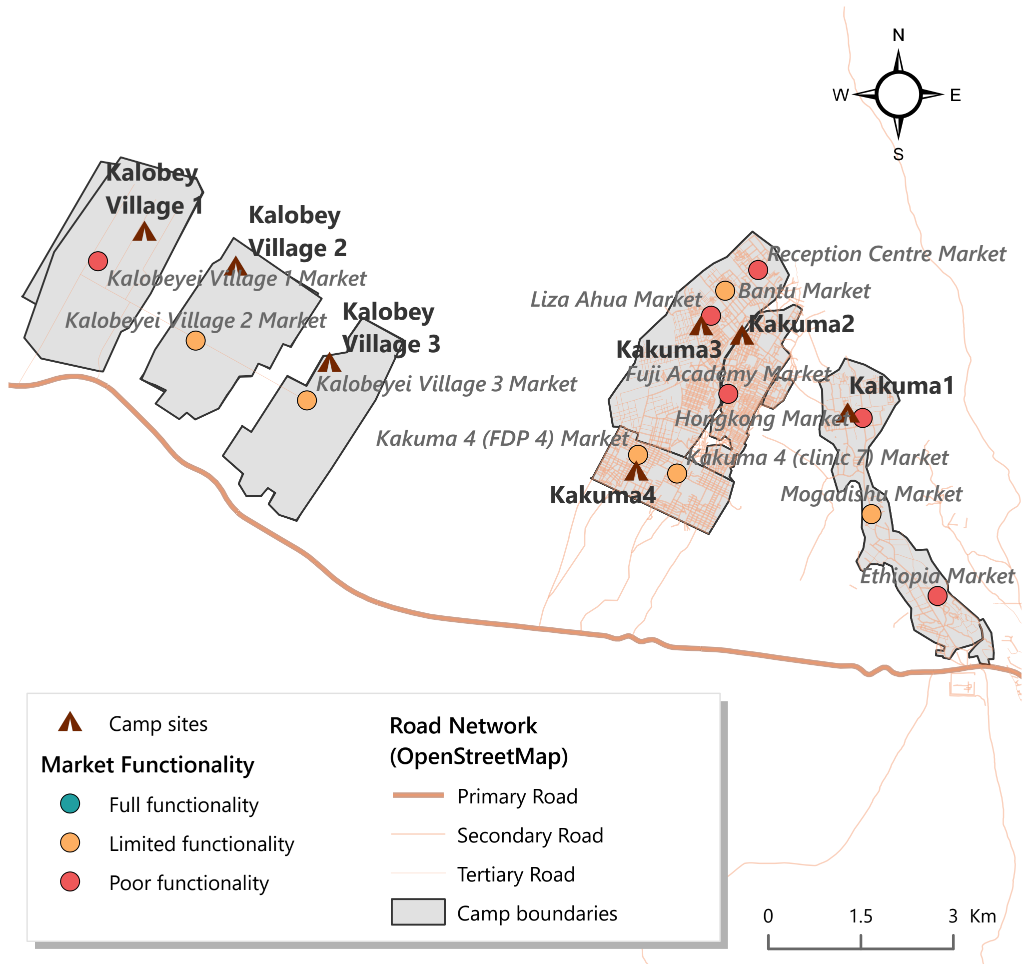


Figure 4: Map of market functionality of assessed markets in Kakuma

Market functionality, as an extension of the JMMI, is a recurring assessment process. The Market Functionality Score (MFS)[17] assesses markets across five key dimensions: accessibility, availability, affordability, resilience, and infrastructure.

In an analysis of the 15 markets assessed, it was determined that two markets in Dadaab and six in Kakuma are operating with restricted capabilities. Furthermore, a significant portion—specifically half of the markets in Kakuma—were identified as poorly functioning. In contrast, the Dagahaley market in Dadaab stands out as the only market operating at full capacity. This marks a notable enhancement from its previous status of poor functionality recorded in the fourth quarter of 2023. This improvement is particularly commendable considering the previous assessment,[13] which noted that Dagahaley camp had been severely affected by flooding, leading to hindered access to the market and diminished resilience. On the other hand, the Ifo and Hagadera markets have shown stability by retaining their prior classifications.

In Kakuma, markets maintained their level of classification except for Kalobeyei Village 1, Liza Ahua, and Reception Centre markets, which deteriorated from limited functionality. Affordability and accessibility are the main poorly performing attributes in Kakuma. Affordability is influenced by customers' ability to afford core items and predict future costs, while accessibility is based on vendors' ability to physically access the markets and the social barriers customers may face.

Methodology

The JMMI is conducted jointly with KCWG partners. The geographic coverage is determined by the access and capacity of participating partners. The participating agencies collectively developed and reviewed the data collection tools, and trained their enumerators on the JMMI methodology and data collection tools. Primary data was collected through interviews with vendors (vendors who sell directly to customers) in the targeted marketplaces. Enumerators were asked to record three prices per item in each targeted marketplace. Data was collected through the Kobo collect mobile application and was uploaded to a secure server for cleaning and analysis.

For each item, the median prices per marketplace were calculated, after which the median of all those locations was calculated to derive the aggregated median prices presented in this factsheet. This methodology is derived to minimise the effects of outliers and differing amounts of data among assessed locations. Outliers are reported only where relevant. Non-numeric indicators of categorical values are calculated as proportions.

Using the purposive sampling, 296 vendors were interviewed as key informants (164 from Kakuma and 132 from Dadaab). At least three prices per item in each of the camps were collected for a total of 67 basic food and NFIs. The interviews were conducted both face-to-face and remotely with vendors selling food and non-food items. Data was collected between the 11th March and 7th April 2024 across 15 markets in the camps.

REACH performed daily data quality checks with the partners during and after data collection. This process includes checking for duplicate interviews and numerical outliers (particularly item prices). Data was analysed at the camp level using R statistical software. All findings are indicative and only apply to the period within which data was collected. Moreover, item specifications may vary slightly between locations according to the different brands available, and comparability between the locations assessed is limited.

Challenges and Limitations

- Price data is only indicative for the time frame within which it was collected.
- For some questions, vendors were asked to recall events over a 3-month period. This is a long period of time, which might impact the accuracy of answers.
- The JMMI data collection tool requests the cheapest available type of each item to be recorded, as availability varies across the camps, price comparisons across the camps may be based on slightly varying products.
- Some vendors lacked weighing scales and owing to this, an estimation of how much forms a kilogram was done. This was for commodities such as vegetables, onions, and tomatoes. In some cases, the estimation may differ.
- The methodology specifies that three prices are collected per commodity, per market. Due to the unavailability of multiple vendors selling various commodities at the market, it was not possible to collect 3 prices for some commodities in some markets.
- The quality of some of the assessed items differed, hence the high price variations e.g. kitchen ware.

Endnotes

[1] 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.

[2] Kenya Refugee Population by UNHCR, March 2024.

[3] National Drought Early Warning Bulletin by NDMA, March 2024.

[4] Climate Outlook for the “Long Rains”(March - May) season by KMD, February 2024.

[5] USD-147.016 KES in March 2024.

[6] Change since the last round of JMMI data collection in December 2023 (Q4 2023).

[7] Shortage of Supplies by Kenya News Agency, April 2024.

[8] Turkana County: Drought Early Warning Bulletin by NDMA, March 2024.

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

[10] 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.”

[11] The total percentages may not add up to 100% due to respondents choosing “Prefer not to answer”.

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

[13] Refugee Camps Joint Market Monitoring Initiative, KCWG, December 2023.

[14] Kenya cost of fuel, EPRA, March 2024.

[15] The Public Order Act, Kenya Law, 2023.

[16] Banditry and Lawlessness in the ASALs by KIPPRA, January 2024 .

[17] 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

NDMA — National Drought Management Authority — Committed to ending drought emergencies

Kenya Red Cross

UNHCR — The UN Refugee Agency

WFP — World Food Programme

REACH — Informing more effective humanitarian action