

INTRODUCTION

The aim of the Ethiopia JMMI is to provide regular, reliable information on prices and market functionality through the use of harmonised tools and validated analysis. The Ethiopia JMMI is a joint exercise led by REACH (ACTED's initiative) in close collaboration with Ethiopia Collaborative Cash Delivery (CCD) Network members. This initiative aims to collaboratively develop an evidence base for the wider use of cash and voucher assistance (CVA), as well as facilitate discussions of changes in critical market dynamics, which are an integral part of cash feasibility considerations.

With uniform methodology, CCD members collect data from their respective areas of operation on a voluntary basis. CCD members formed a JMMI taskforce which reviews and validates the collected data. 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.

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 3 and 13 April 2023 and is strictly indicative².

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

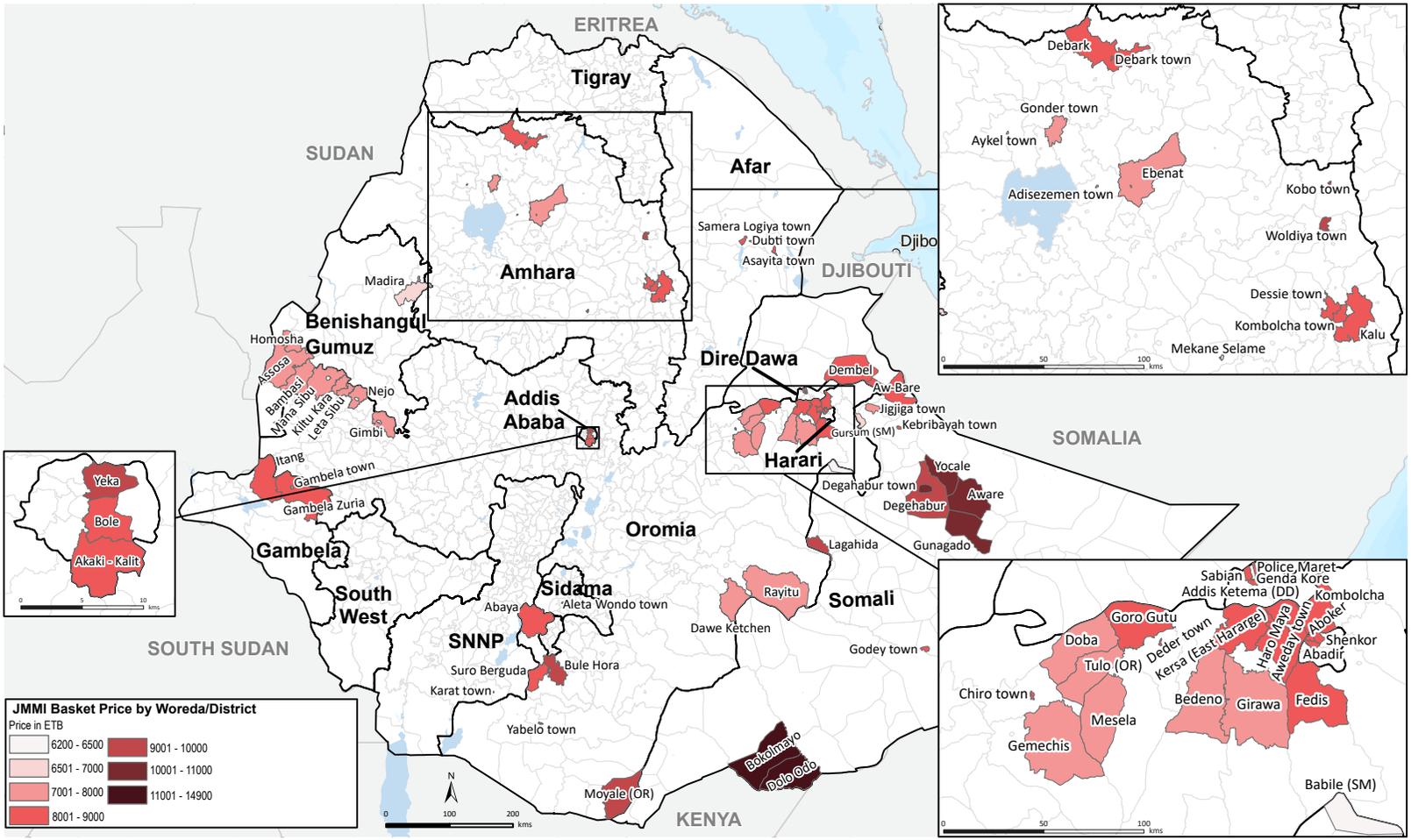
1. Exchange rates are taken from the United Nations (UN) Operational Rates of Exchange
 2. Some data collected prior to this period has been included in this analysis (Nov 2022- Mar 2023).

Median cost of JMMI basket
8076.02 ETB
149.84 USD¹
 Change since Mar 2023
 ▲ ETB 251 3%

Median cost of Food JMMI basket
7623.02 ETB
141.43 USD¹
 Change since Mar 2023
 ▲ ETB 257 3%

9 participating agencies,
 206 assessed marketplaces, in 76 woredas
 across 11 regions, 689 KIIs with vendors

ASSESSED WOREDAS, APRIL 2023



JMMI Basket Price by Woreda/District

Price in ETB	Color
6200 - 6500	Lightest Red
6501 - 7000	Light Red
7001 - 8000	Medium Red
8001 - 9000	Dark Red
9001 - 10000	Darkest Red
10001 - 11000	Very Dark Red
11001 - 14900	Darkest Red



Funded by the European Union



ETHIOPIA JMMI BASKET CONTENTS

JMMI Food Basket

Cereals and root crops	72 kg	Cooking oil	5.86 L
Meat	2.7 kg	Onions	5 kg
Eggs (local)	18	Tomatoes	5 kg
Green leafy vegetables	5 kg	Potatoes	3 kg

Full JMMI Basket

Bath soap	3x 125 g bars
Laundry soap	6x 200 g bars

The JMMI basket is a selection of food and hygiene items that represents some of the core monthly expenditures incurred by an average 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 effort to develop a Minimum Expenditure Basket (MEB) for the Somali region in 2020,³ 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.

USD/ETB buy rate¹

53.898 ETB

Assumptions:

1. The meat component is equally distributed among beef, goat, and camel when calculating the national-level JMMI basket. At regional, zone and woreda levels, meat was assessed as follows:

Beef	Addis Ababa, Amhara, Benishangul Gumuz, Gambela, Oromia, SNNP, Harari, Dire Dawa, Sidama
Beef and goat meat	Afar
Camel and goat meat	Somali

2. When calculating the national-level JMMI basket, the cereal and root crop component is equally distributed among all seven staple cereals and root crops monitored (10.3 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, Gambela, Oromia, Amhara, Benishangul Gumuz, Harari, Dire Dawa
Maize, sorghum, wheat, rice	Somali
Maize, sorghum, teff, barley	Afar
Maize, teff, barley, enset	SNNP, Sidama

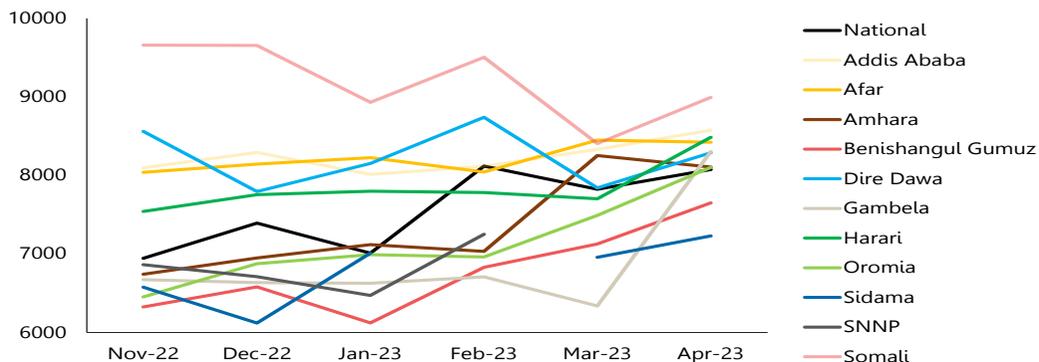
TABLE 1: MEDIAN FULL JMMI BASKET PRICE PER REGION

Region	JMMI basket in ETB	JMMI basket in USD	Change since Mar round ⁵	JMMI basket (Mar) in ETB	JMMI basket (Mar) in USD
Addis Ababa	8575.36	148.03	▲ 3%	8332.14	144.03
Afar	8422.17	149.86	0%	8450.25	151.04
Amhara	8107.49	142.38	▼ 2%	8252.90	144.79
Benishangul Gumuz	7649.55	133.63	▲ 7%	7127.76	124.02
Dire Dawa	8287.48	146.25	▲ 6%	7840.02	138.97
Gambela	8303.29	146.26	▲ 31%	6338.59	110.85
Harari	8485.71	149.93	▲ 10%	7702.03	136.54
Oromia	8102.61	141.37	▲ 8%	7490.22	130.92
Sidama	7229.00	125.77	▲ 4%	6957.32	120.71
SNNP	7278.78	129.48	NA	NA	NA
Somali	8993.11	157.67	▲ 7%	8406.01	147.98
JMMI full basket	8076.02 ETB	149.84 USD¹	▲ ETB 251	▲ 3%	
JMMI food basket	7623.02 ETB	141.43 USD¹	▲ ETB 257	▲ 3%	

TABLE 2: NATIONWIDE MEDIAN PRICE PER ASSESSED ITEM

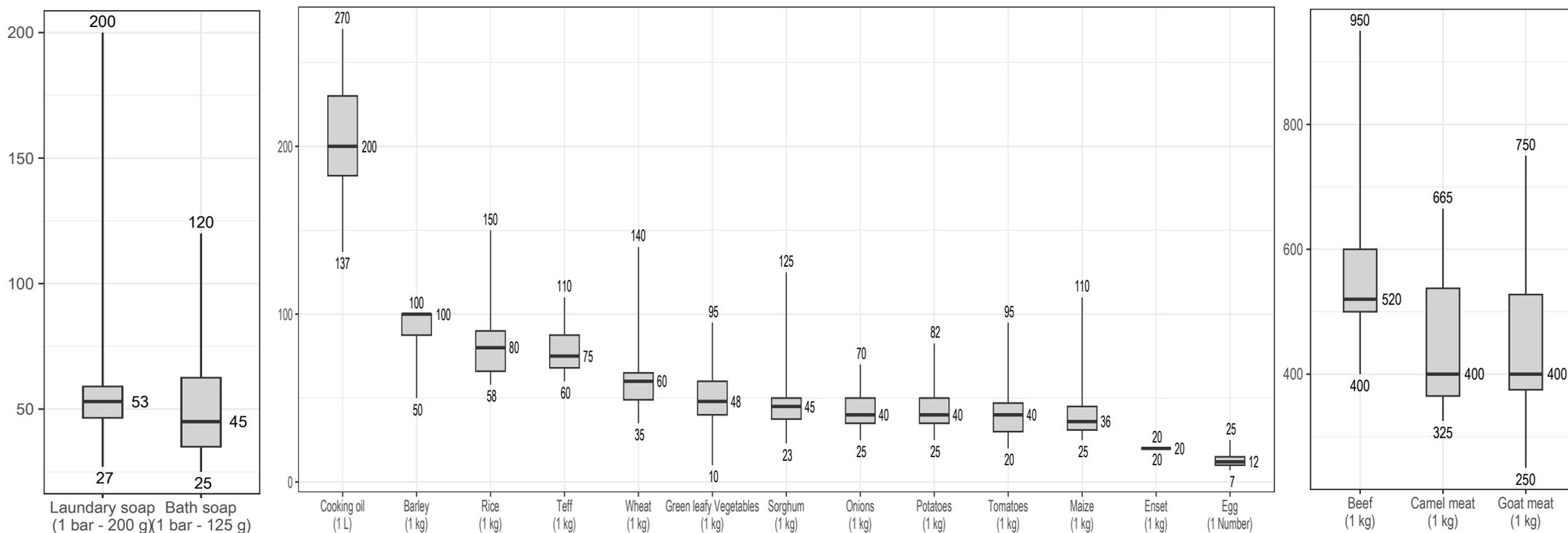
Item	Unit	Price in ETB	Price in USD	Change since Mar round	Price (Mar) in ETB	Price (Mar) in USD
Food Items						
Maize	1 kg	36	0.67	▲ 3%	35	0.65
Sorghum	1 kg	45	0.83	0%	45	0.84
Teff	1 kg	75	1.39	▲ 9%	69	1.29
Wheat	1 kg	60	1.11	▲ 15%	52	0.97
Barley	1 kg	100	1.86	0%	100	1.86
Enset	1 kg	20	0.37	0%	20	0.37
Rice	1 kg	80	1.48	▲ 14%	70	1.3
Beef	1 kg	520	9.65	0%	520	9.69
Goat meat	1 kg	400	7.42	0%	400	7.45
Camel meat	1 kg	400	7.42	▼ 6%	425	7.92
Leafy vegetables	1 kg	48	0.89	▲ 2%	47	0.88
Tomatoes	1 kg	40	0.74	0%	40	0.75
Onions	1 kg	40	0.74	0%	40	0.75
Potatoes	1 kg	40	0.74	0%	40	0.75
Eggs (local)	1 egg	12	0.22	▲ 9%	11	0.2
Cooking oil	1 L	200	3.71	0%	200	3.73
Hygiene Items						
Bath soap	125 grams	45	0.83	0%	45	0.84
Laundry soap	200 grams	53	0.98	▼ 2%	54	1.01

NATIONAL AND REGIONAL JMMI BASKET PRICE (ETB)



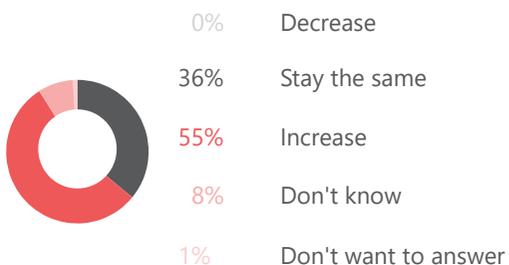
3. Minimum Expenditure Basket for Somali Region Guidance Note, June 2020. Additional sources consulted to assemble the JMMI Basket include the Ethiopia Food Security and Water, Sanitation and Hygiene (WASH) sectors, World Food Programme (WFP) vulnerability analysis and mapping (VAM), and publications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

PRICE VARIATIONS FOR JMMI BASKET ITEMS (ETB)



REPORTED PREDICTED CHANGE IN PRICE OF FOOD ITEMS

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

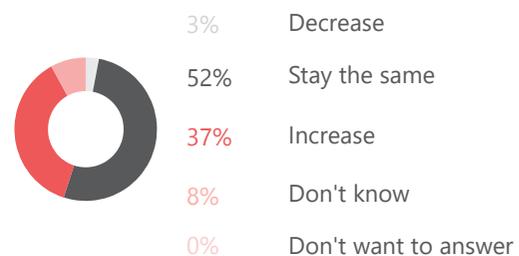


Out of those vendors predicting an increase in food prices, the most frequently cited reasons were:⁵

- 1** 55% Rising exchange rate
- 2** 43% Customers will demand more of these items
- 3** 21% Vendors cannot obtain 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:



Out of those vendors predicting an increase in hygiene item prices, the most frequently cited reasons were:⁵

- 1** 69% Rising exchange rate
- 2** 26% Customers will demand more of these items
- 3** 15% Vendors cannot obtain items

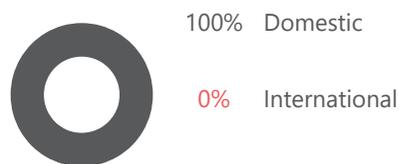
⁵ Percentages do not add up to 100% as vendors were allowed to give multiple answers.



LOCATION OF MAIN SUPPLIERS FOR FOOD AND HYGIENE ITEMS

64% of vendors reported that their main supplier of food items is located in the same woreda as them.

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



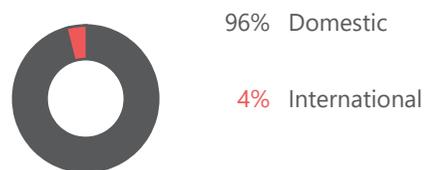
36% of vendors reported that their main supplier of food items is not located in the same woreda as them.

Proportion of vendors whose main food supplier is not located in the same woreda by reported region where the supplier is located:

- 46% Oromia
- 21% Amhara
- 18% Somali
- 6% Benishangul Gumuz
- 4% SNNP

65% of vendors reported that their main supplier of hygiene items is located in the same woreda as them.

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



35% of vendors reported that their main supplier of hygiene items is not located in the same woreda as them.

Proportion of vendors whose main hygiene supplier is not located in the same woreda by reported region where the supplier is located:

- 26% Amhara
- 23% Somali
- 21% Oromia
- 7% Dire Dawa
- 5% Addis Ababa

DIFFICULTIES TO MEET DEMAND AND TO TRANSPORT OR PROCURE

7% (n= 43) of vendors reported having faced difficulties obtaining enough food items to meet demand in the 30 days prior to data collection.

2% (n= 3) of vendors reported having faced difficulties obtaining enough hygiene items to meet demand in the 30 days prior to data collection.

The three most frequently cited reasons were:⁵

- 1 65% (n= 28) Producers producing less
- 2 48% (n= 21) Increased demand
- 3 45% (n= 19) Suppliers cannot meet demand

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

BARRIERS TO MARKET ACCESS FOR CUSTOMERS

Customer groups that were reported to have faced difficulties visiting marketplaces in the 30 days prior to data collection, e.g., due to movement restrictions:⁶

- 1 30% People with disabilities
- 2 29% Chronically ill
- 3 27% Older persons
- 4 9% Children

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

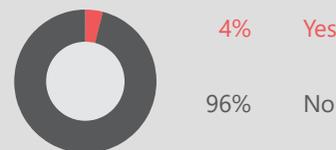


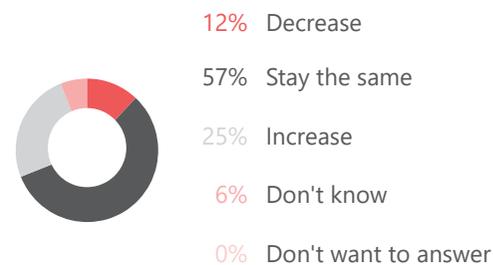
TABLE 3: AVAILABILITY OF ITEMS FROM SUPPLIERS, AVAILABLE STOCK AND TIME NEEDED TO RESTOCK AT THE TIME OF DATA COLLECTION

Item	Available (% KIs)	Limited (% KIs)	Not available (% KIs)	Item ⁸	Stock available for (days)	Restock in (days)
Food items⁷				Food items		
Maize	75%	19%	6%	Maize	13	3
Sorghum	62%	29%	7%	Sorghum	15	3
Teff	55%	26%	14%	Teff	15	4
Wheat	49%	35%	16%	Wheat	15	3
Barley	38%	33%	23%	Barley	30	3
Rice	49%	28%	14%	Rice	14	2
Enset	10%	14%	61%	Enset	1	1
Beef	64%	30%	7%	Beef	2	1
Goat meat	92%	8%	0%	Goat meat	1	1
Camel meat	60%	10%	30%	Camel meat	3	1
Eggs (local)	59%	26%	12%	Eggs (local)	5	2
Leafy vegetables	79%	21%	0%	Leafy vegetables	3	2
Onions	87%	13%	0%	Onions	5	2
Tomatoes	87%	13%	0%	Tomatoes	4	2
Potatoes	85%	15%	0%	Potatoes	5	2
Cooking oil	82%	17%	2%	Cooking oil	15	2
Hygiene items				Hygiene items		
Laundry soap	90%	10%	0%	Laundry soap	15	2
Bath soap	89%	11%	0%	Bath soap	15	2

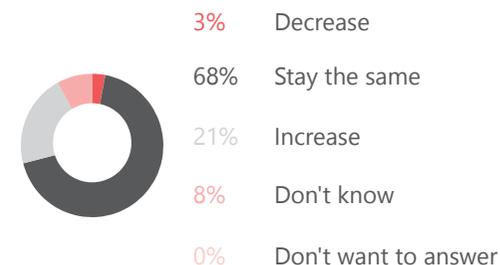
6. In addition, 51% of the vendors answered "don't know" about consumer groups reported to have faced the most difficulty accessing marketplaces.
 7. Some of the percentages in this list do not add up to 100% either due to rounding or because there is no data for some locations.
 8. Red numbers in this table flag restocking times that exceed the time that current stocks will last, thus indicating potential shortages.

CHANGE IN NUMBER OF CUSTOMERS AND VENDORS

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



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



TYPES OF PAYMENT MODALITIES AVAILABLE TO CUSTOMERS

Proportion of vendors reporting accepting different types of payment in the 30 days prior to data collection:⁵

- 1 100% Cash (ETB)
- 2 17% Mobile money
- 3 11% Informal credit

About the Ethiopia JMMI and Ethiopia CCD

The Ethiopia JMMI is a joint initiative led by REACH on behalf of the Ethiopia CCD and in close collaboration with its 14 member organisations, which include REACH in its capacity as an ACTED's initiative hosted by ACTED in country.

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 led by REACH on behalf of 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 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

- South west and Tigray regions were not assessed due to access constraints and no presence of data collection partners.
- In March 2023, wheat and teff prices were not collected in Gambela, which can be one factor for the upward monthly price change reported in Table 2.
- The JMMI methodology specifies that 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 some commodities.*
- All findings are indicative and not statistically generalisable at any level.

*For this reason, at regional level, there were less than 3 prices collected for specific items: Dire Dawa-green leafy vegetables; Gambela- sorghum; Harari- green leafy vegetables, potatoes; Sidama- beef, green leafy vegetables; SNNP-barley, enset, onions.

JMMI Partners

- ACF - Action contre le Faim⁹
- ACTED - Agency for Technical Cooperation and Development
- CARE⁹
- Concern Worldwide⁹
- CRS - Catholic Relief Services
- DCA - DanChurchAid⁹
- DRC - Danish Refugee Council
- GOAL
- IRC - International Rescue Committee⁹
- Mercy Corps⁹
- NRC -Norwegian Refugee Council⁹
- Oxfam⁹
- SCI - Save the Children
- WVI - World Vision International⁹

9. These JMMI partners participated in the April 2023 round of 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 is/are prioritised for data collection, with expansion to rural areas depending on the availability of contributing partners. For the purposes of the Ethiopia JMMI, a marketplace is defined as an area with a relatively sizable concentration of traders in close proximity to each other. 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 and who are patronised by average consumers in the area. Field teams aim to collect a minimum of three prices per assessed item per assessed woreda.

Once data has been collected, it is uploaded to a secure KoBo server for cleaning and analysis. As the data is collected at the KI level, the following steps are undertaken to aggregate the trader level data to the location level:

- Availability is defined categorically (available, limited, unavailable) for each item
- Commodity prices and stock levels are collected from individual traders and median prices/stock levels are calculated for each item within each assessed woreda
- National and regional medians are then calculated using a "median of medians" approach, i.e. by calculating a new median from all woreda-level medians
- All vendors are asked about their ability to restock and whether a trader has restocked in the last month. If any given trader states they are able to restock an item or, if at least one trader restocked in the last month, respectively, then those abilities are assumed for that woreda.

Data collection for this round took place between 3 and 13 April 2023. In April, 9 out of 14 of the JMMI partners conducted a total of 689 KIIs. This round covered 206 marketplaces, which were sampled by partners nationwide based on their access and existing areas of intervention. This includes markets in 76 out of 1040 woredas in Ethiopia.

About REACH

REACH is a joint initiative that facilitates the development of information tools and products that enhance the capacity of aid actors to make evidence-based decisions in emergency, recovery, and development contexts. By doing so, REACH contributes to ensuring that communities affected by emergencies receive the support they need. All REACH activities are conducted in support to and within the framework of inter-agency aid coordination mechanisms.

For more information, please visit our website at www.reach-initiative.org or follow us on Twitter at @REACH_info.



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