

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 4 and 14 July 2022 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 (February, March, April, May and June 2022).

Median cost of JMMI basket

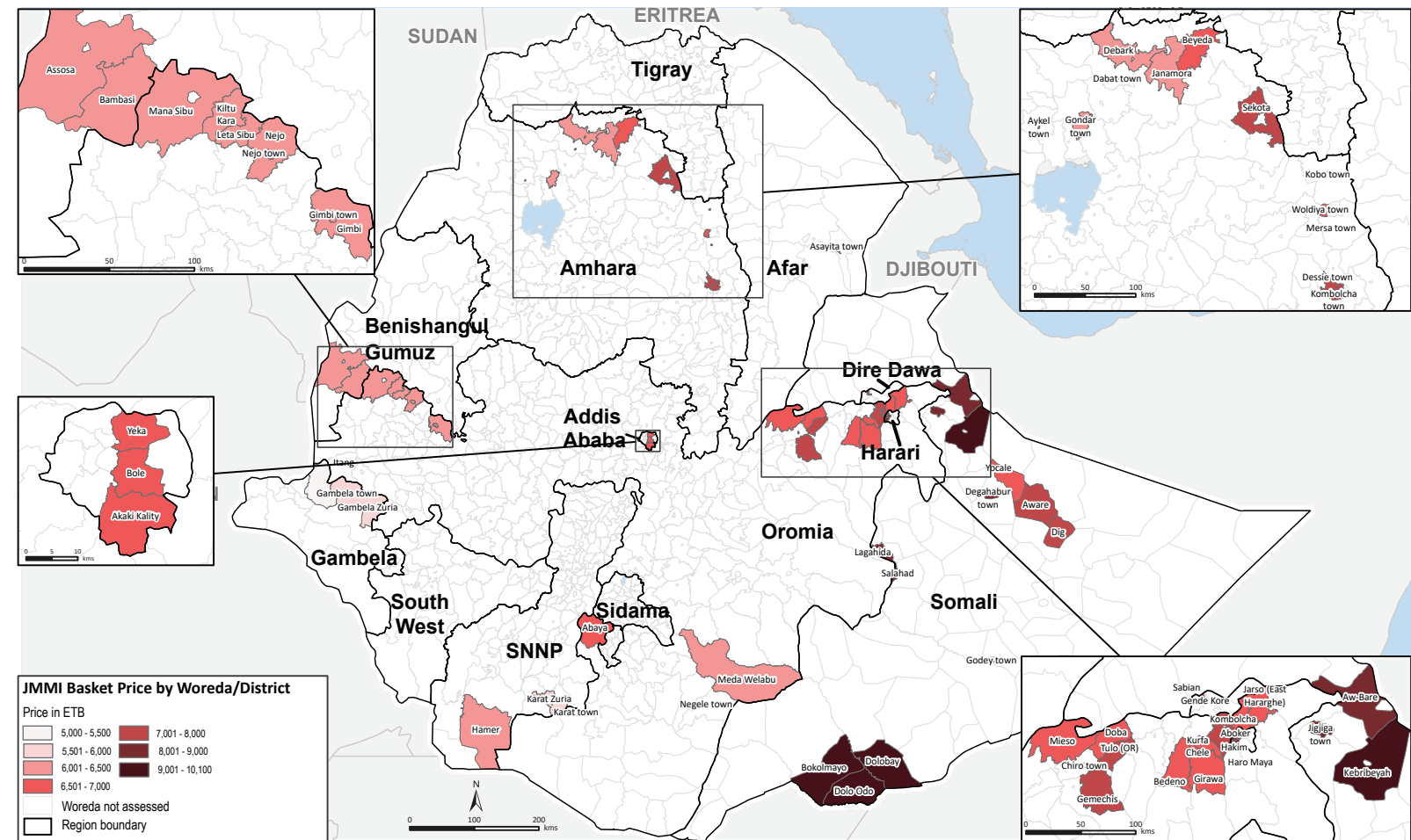
6,921.17 ETB
133.15 USD¹

Median cost of Food JMMI basket

6,570.17 ETB
126.39 USD¹

- 12 participating agencies
- 10 assessed regions
- 66 assessed woredas
- 203 assessed marketplaces
- 624 KIIs with vendors
- 18 assessed commodities

ASSESSED WOREDAS, JULY 2022



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's Minimum Expenditure Basket (MEB) for the Somali region,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.

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

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 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, Gambela, Oromia, Amhara, Benishangul Gumuz, Harari, Dire Dawa

Maize, sorghum, wheat, rice Somali

Maize, sorghum, teff, barley Afar

Maize, teff, barley, enset SNNP

USD/ETB buy rate¹

51.982 ETB

TABLE 1: MEDIAN JMMI BASKET PRICE AT TIME OF INTERVIEW AT REGIONAL LEVEL

Region	JMMI basket in ETB	JMMI basket in USD	Change since June round ⁵	JMMI basket (June) in ETB	JMMI basket (June) in USD
Addis Ababa	6912.62	132.98	▲ 5%	6582.84	127.82
Afar	7554.21	145.32	▲ 12%	6745.65	130.99
Amhara	6628.27	127.51	▲ 6%	6271.72	121.78
Benishangul Gumuz	6297.65	121.15	▲ 1%	6248.55	121.33
Dire Dawa	7948.14	152.90	NA	NA	NA
Gambela	5653.52	108.76	0%	5677.14	110.24
Harari	8279.79	159.28	▲ 14%	7251.57	140.81
Oromia	6677.40	128.46	▲ 5%	6336.24	123.04
SNNP	6098.08	117.31	▼ 8%	6643.70	129.01
Somali	8799.95	169.29	▼ 8%	9557.19	185.58

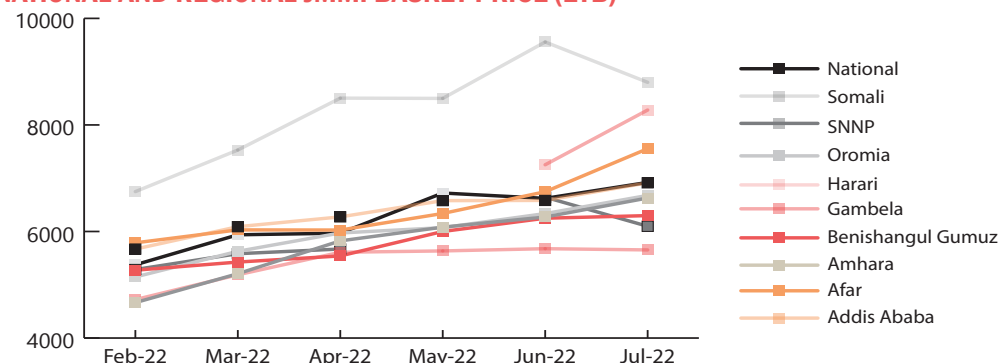
JMMI full basket 6,921.17 ETB 133.15 USD¹ ▲299 5%

JMMI food basket 6,570.17 ETB 126.39 USD¹ ▲270 4%

TABLE 2: NATIONWIDE MEDIAN ITEM PRICES AT TIME OF INTERVIEW

Item	Unit	Price in ETB	Price in USD	Change since June round	Price (June) in ETB	Price (June) in USD
Food Items						
Maize	1 kg	30	0.58	▲ 7%	28	0.54
Sorghum	1 kg	35	0.67	▲ 9%	32	0.62
Teff	1 kg	52	1	▲ 3%	51	0.98
Wheat	1 kg	40	0.77	▼ 5%	42	0.82
Barley	1 kg	50	0.96	▲ 43%	35	0.68
Enset	1 kg	30	0.58	▲ 50%	20	0.39
Rice	1 kg	60	1.15	0%	60	1.17
Beef	1 kg	490	9.43	▲ 2%	480	9.32
Goat meat	1 kg	500	9.62	▼ 9%	550	10.68
Camel meat	1 kg	500	9.62	▼ 13%	575	11.17
Leafy vegetables	1 kg	47	0.89	▲ 16%	40	0.78
Tomatoes	1 kg	43	0.82	▲ 21%	35	0.68
Onions	1 kg	50	0.96	0%	50	0.97
Potatoes	1 kg	30	0.58	0%	30	0.58
Eggs (local)	1 egg	10	0.19	0%	10	0.19
Cooking oil	1 L	205	3.94	0%	205	3.98
Hygiene Items						
Bath soap	125 grams	35	0.67	0%	35	0.68
Laundry soap	200 grams	41	0.79	▲ 14%	36	0.73

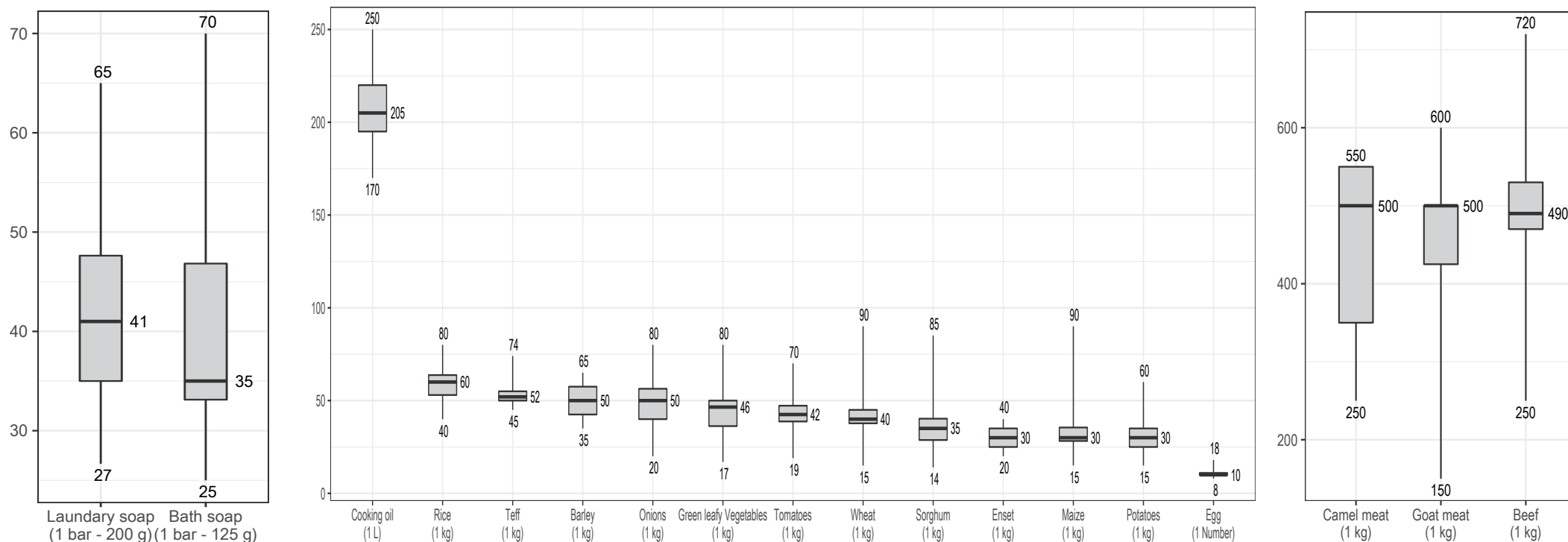
NATIONAL AND REGIONAL JMMI BASKET PRICE (ETB)



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).

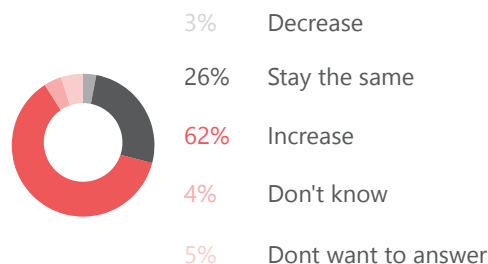
4. Southern Nations, Nationalities and Peoples' Region

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:

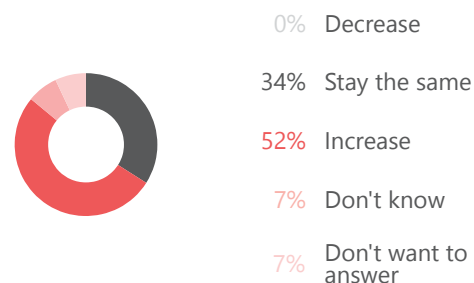


Out of those vendors predicting an increase in food prices, the most frequently cited reasons were:⁵

- 1 59% Rising exchange rate
- 2 28% Customers will demand more of these items
- 3 20% Customers will run out of these 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 72% Rising exchange rate
- 2 15% Customers will demand more of these items
- 3 7% Customers will run out of these items

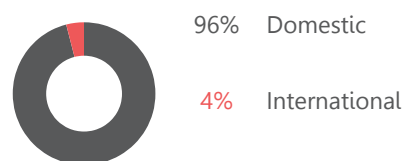
5. Percentages do not add up to 100% as vendors were allowed to give multiple answers.



LOCATION OF MAIN SUPPLIERS FOR FOOD AND HYGIENE ITEMS

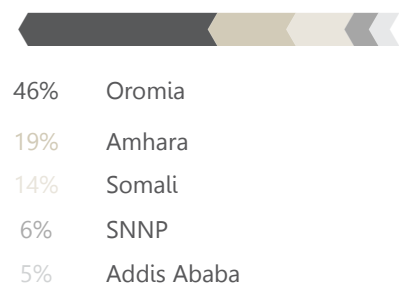
55% of vendors reported that their main supplier of food items is located in the same woreda as them.

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



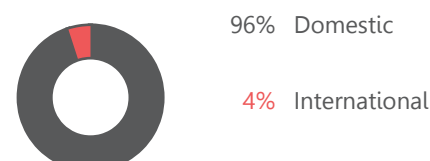
45% of vendors reported that their main supplier of food items is not located in the same woreda as them.

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



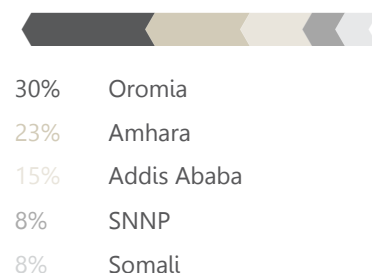
48% of vendors reported that their main supplier of hygiene items is located in the same woreda as them.

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



52% 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:



DIFFICULTIES TO MEET DEMAND AND TO TRANSPORT OR PROCURE SUPPLIES

28% of vendors reported having faced difficulties obtaining enough food items to meet demand in the 30 days prior to data collection.

The three most frequently cited reasons were:⁵

- 1 42% Not enough money to purchase in the amounts needed by customers
- 2 38% Increased demand
- 3 34% Suppliers no longer available to allow credit purchases

15% 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 41% Not enough money to purchase in the amounts needed by customers
- 2 35% Transport shortage
- 3 24% Suppliers no longer available to allow credit purchases

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

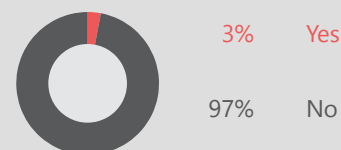
- 1 5% Cooking oil
- 2 3% Onions
- 3 2% Maize

BARRIERS TO MARKET ACCESS FOR CUSTOMERS

Customer groups having reportedly found difficult to visit marketplaces, in the 30 days prior to data collection, either due to movement restrictions or due to fear of catching COVID-19:⁶

- 1 27% Older persons
- 2 14% Persons with disability
- 2 11% Children
- 3 10% Chronically ill

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.



Among those vendors who had observed incidents (n=18), most commonly reported types of incidents:

- 1 Armed group activity (8 vendors)
- 2 Theft of goods (7 vendors)
- 3 Theft of cash (1 vendor)

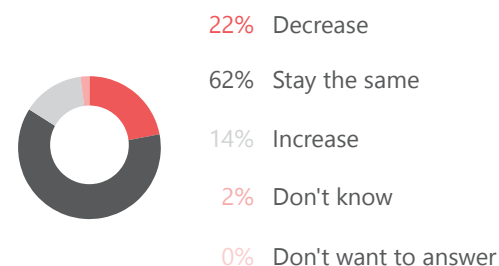
TABLE 3: CURRENT AVAILABILITY OF ITEMS FROM SUPPLIERS, AVAILABLE STOCK AND TIME NEEDED TO RESTOCK

Item	Available (% KIs)	Limited (% KIs)	None (% KIs)	Item ⁸	Stock available for (days)	Restock in (days)
Food items⁷				Food items		
Maize	63%	29%	9%	Maize	15	5
Sorghum	63%	25%	13%	Sorghum	15	5
Teff	50%	30%	16%	Teff	16	5
Wheat	45%	43%	13%	Wheat	20	7
Barley	43%	29%	20%	Barley	30	2
Rice	59%	27%	11%	Rice	20	5
Enset	7%	13%	70%	Enset	19	21
Beef	74%	14%	7%	Beef	2	2
Goat meat	83%	17%	0%	Goat meat	1	1
Camel meat	60%	40%	0%	Camel meat	2	1
Eggs (local)	47%	40%	11%	Eggs (local)	5	5
Leafy vegetables	63%	37%	0%	Leafy vegetables	3	2
Onions	63%	37%	0%	Onions	7	3
Tomatoes	69%	31%	0%	Tomatoes	4	2
Potatoes	73%	24%	0%	Potatoes	6	3
Cooking oil	58%	40%	0%	Cooking oil	15	4
Hygiene items				Hygiene items		
Laundry soap	80%	15%	2%	Laundry soap	15	4
Bath soap	83%	17%	0%	Bath soap	15	4

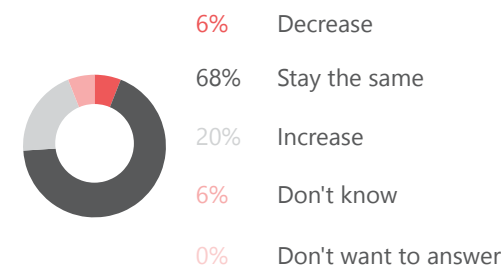
6. In addition, 60% of the vendors answered "don't know" about consumer groups reported to have faced the most difficulty accessing marketplaces.
7. Some of the percentages in this list do not add up to 100% either due to rounding or because there is no data for some locations.
8. Red numbers in this 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 on changes in the number of customers coming to their shop as compared to 30 days prior to data collection:



Proportion of vendors 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 CUSTOMERS

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

- 1 99% Cash (ETB)
- 2 14% Mobile money
- 3 11% Money transfer
- 4 7% 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

- Partners were unable to collect data from the following regions of Ethiopia in this data collection round: Sidama, South West, and Tigray.
- 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 as the following: Afar-cooking oil, Benishangul Gumuz-wheat; Gambela- egg; Harari- maize, cooking oil, bath soap, laundry soap ; SNNP-barley; Dire Dawa- teff, wheat, beef, cooking oil, eggs, onions, tomatoes, bath soap, laundry soap.

JMMI Partners

- ACF - Action contre le Faim⁹
- ACTED-Agency for Technical Cooperation and Development⁹
- CARE⁹
- Concern Worldwide⁹
- CRS - Catholic Relief Services
- DCA - DanChurchAid⁹
- DRC - Danish Refugee Council⁹
- GOAL⁹
- IRC - International Rescue Committee⁹
- Mercy Corps⁹
- NRC -Norwegian Refugee Council
- Oxfam⁹
- SCI - Save the Children⁹
- WVI - World Vision International⁹

9. These JMMI partners participated in the July 2022 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 4 and 14 July 2022. In July, 12 out of 14 of the JMMI partners conducted a total of 624 KIIs. This round covered 203 marketplaces, which were sampled by partners nationwide based on their access and existing areas of intervention. This includes markets in 66 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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