

Zaporizka Oblast Market Analysis: Ukraine-control areas vs. areas beyond Ukraine's control

INTRODUCTION AND KEY FINDINGS

- The purpose of this brief is to compare market dynamics in Ukraine-control areas (UCA) and areas beyond Ukraine's control (ABUC) in Zaporizka oblast** based on data collected during [October 2023 for JMMI round 19](#). The analysis aims to inform actors working in each space as to comparative market dynamics that influence the feasibility of using cash as an aid modality as well as bringing awareness to cash and market vulnerabilities of households in these areas.
- Prices were found to be higher in ABUC than in UCA**, which points to a need for higher levels of cash to cover the same amount of essential items in ABUC. The cost of the JMMI basket in ABUC of Zaporizka was found to be 257% of the same basket in UCA. NFIs in ABUC, in particular, were found to be 307% the price of the NFI basket in UCA. Of food items, cabbage, carrots, chicken, onions, and potatoes in ABUC were 1.5 times as expensive in UCA. Only bread, milk, and rice were found to be the same or lower price in ABUC as compared to UCA in Zaporizka.*
- Difficulties meeting basic needs were found to be greater in ABUC**, due to a lack of available financial service providers and consistent cash flow to pay for items, lower availability of key items such as medication and warm clothes, as well as elevated security risks when seeking out needed items or services. This indicates that both cash and in-kind assistance could benefit ABUC customers and retailers. When looking at fuel however, it was found to be more expensive in UCA.

JMMI round 19 national basket prices

Basket	Food	NFIs
1051.77	520.38	531.39
UAH	UAH	UAH

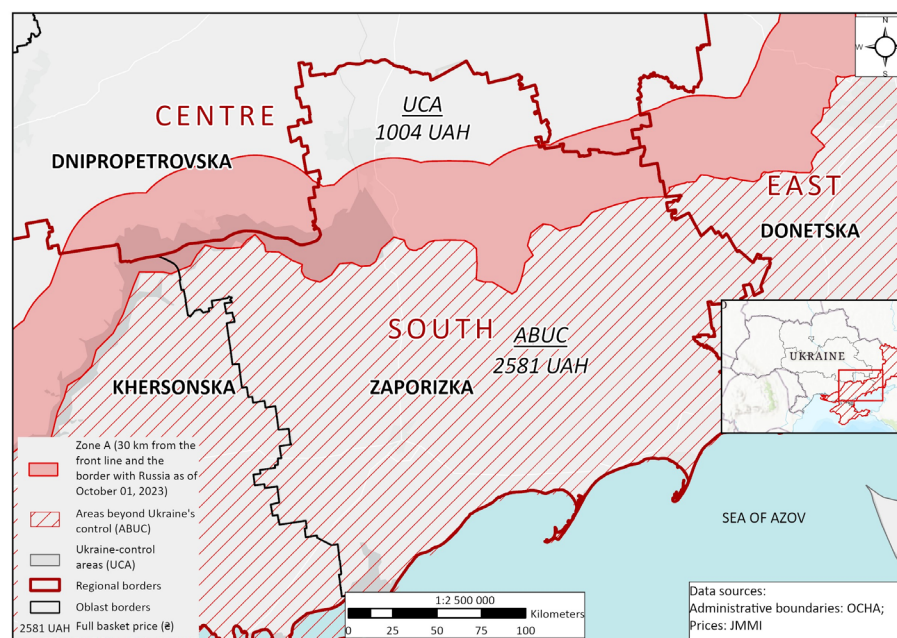
JMMI basket price comparison

UCA	ABUC
1004.07	2581.10
UAH	UAH

Table 1: JMMI basket item prices

JMMI Basket Item	National Price (UAH)	Zaporizka UCA (UAH)	Zaporizka ABUC (UAH)	Price in ABUC/ Price in UCA*
Food	520	472	947	201%
Bread	18	18	18	100%
Buckwheat	36	38	45	121%
Cabbage	10	12	25	208%
Carrots	10	14	28	198%
Chicken (legs)	113	85	143	168%
Complementary cereal for babies	92	55	406	740%
Drinking water	15	14	20	148%
Eggs (chicken)	50	55	57	103%
Milk (2.5%)	32	33	30	91%
Oil (sunflower)	50	46	55	119%
Onion	15	16	27	170%
Potato	10	12	20	163%
Rice (round)	52	56	53	93%
Wheat flour (white)	19	19	22	116%
NFIs	531	532	1634	307%
Body soap	14	14	37	271%
Infant diapers (size 3)	374	360	1250	347%
Hygiene/sanitary pads	41	38	102	268%
Laundry soap	21	22	39	177%
Toothpaste	36	47	99	210%
Washing powder (machine)	46	51	107	209%
Overall	1052	1004	2581	257%

Map 1: Zaporizka Ukraine-control vs. beyond Ukraine's control JMMI basket prices



JMMI food basket price comparison

UCA	ABUC
472.07	947.43
UAH	UAH

JMMI NFI basket price comparison

UCA	ABUC
532	1633.67
UAH	UAH

Coverage

5	UCA hromadas
6	ABUC hromadas
26	UCA Customer interviews
25	ABUC Customer interviews
15	UCA Retailer interviews
25	ABUC Retailer interviews

Due to the small sample sizes of customer and retailer key informants in UCA and ABUC (as shown on page 1), counts listed within this factsheet should be taken as indicative and cannot be broadly applied. The same applies to the overall oblast level findings given that 11 out of 67 hromadas in Zaporizka were covered in this data collection.

*The price ratio was calculated by dividing the ABUC price with kopecs by the UCA price with kopecs.



Customer Challenges Findings

- A substantial proportion of customer key informants (KIs) in both ABUC and UCA did not report full availability of key non-food and food items (figure 1). Moreover, nearly all customer KIs in both areas (all but one) reported barriers to accessing stores.
- A higher proportion of ABUC customer KIs reported difficulties finding hygiene items, medication, and food than UCA counterparts, making them less likely to consistently meet food and sanitation needs and cope with chronic health conditions and emergencies. They were also less likely to have consistent access to vehicle fuel to travel to find items elsewhere. Specifically, 0 customer KIs in ABUC reported medication was fully available. 1 of 25 reported medication being unavailable, 15 limited availability, and 9 available on order (figure 1).
- Half or less of UCA (13 of 26) and ABUC (12 of 25) customer KIs reported warm clothes were fully available, signaling possible difficulty coping with winter cold.
- All customer KIs in ABUC reported there being an impact on their ability to access stores. The greatest proportion reported the primary barrier was restricted movement or active fighting (17 of each). Additionally, nearly half or more of customer KIs in both UCA (13 of 26) and ABUC (13 of 25) reported feeling unsafe due to possible targeting. Reports of movement restrictions and fear of targeting, particularly in ABUC, highlighted insecurity as a main barrier to accessing stores.
- The importance of financial barriers to accessing stores reported by customer KIs (figure 3) suggests cash assistance could be a useful aid modality in both ABUC and UCA. However, more than half of customer KIs in ABUC (13 of 25) reported items being unavailable as compared to only 1 of 26 in UCA, emphasizing the significance of in-kind aid in ABUC. UCA customer KIs more often reported items being available, but not being able to afford items or prices having increased (figure 2). A similar proportion of customer KIs in ABUC (9 of 25) and UCA (10 of 26) reported insufficient cash being available.
- A notably higher proportion of ABUC customer KIs reported financial service providers being completely unavailable. Additionally, 11 of 26 customer KIs in UCA reported banks being unavailable but accessible elsewhere as compared to 0 in ABUC, which correlates with previous findings that ABUC face greater movement restrictions (figure 3 and 4).
- Prices of fuel and electricity for vehicles and heating were found to be between 1.4 and 1.7 times higher in UCA than ABUC for all fuel types assessed. Electricity, gas for heating and petrol were found to be the top three fuel sources customer KIs reported needing to purchase most regularly, with petrol being most cited in ABUC. Increased usage of fuel sources to cope with winter and, in the case of ABUC, power outages, is likely to place an additional burden on households' financial capacity, in turn decreasing the amount of income available to meet other basic needs. According to [Epravda](#) and [Business Censor](#), fuel prices in ABUC are observed to be lower than in UCA due to production and prices in Russia, though prices in ABUC and Russia are also rising.

Figure 1: Availability level of NFIs, food, and gas reported by customer KIs

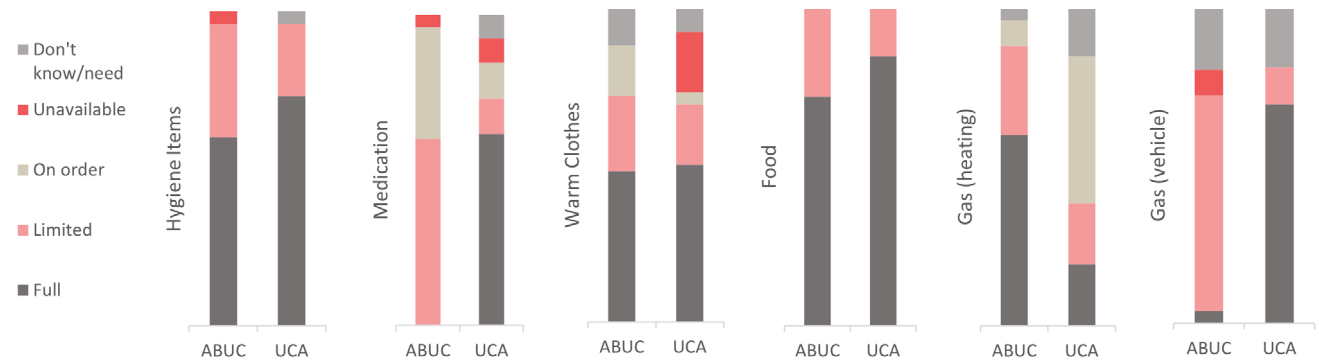


Figure 2: Main financial barriers to accessing stores reported by customer KIs

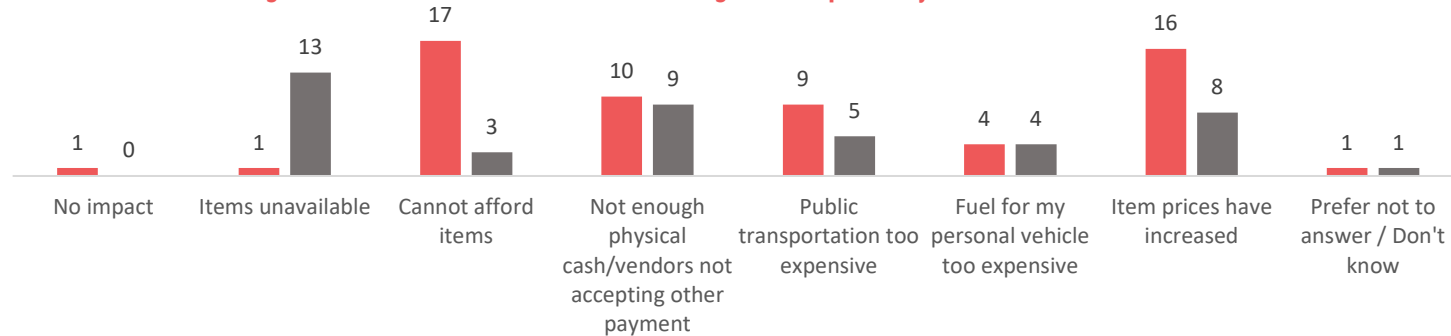


Figure 3: # of customer KIs reporting availability of functioning banks

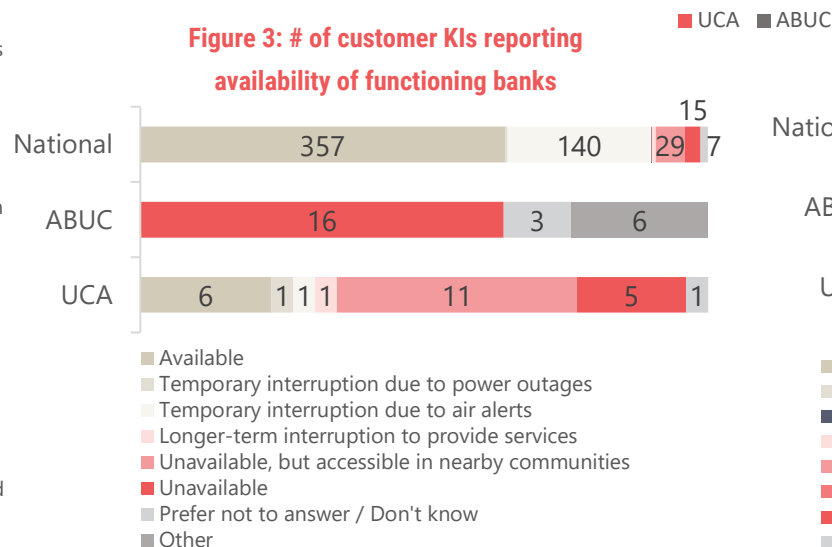
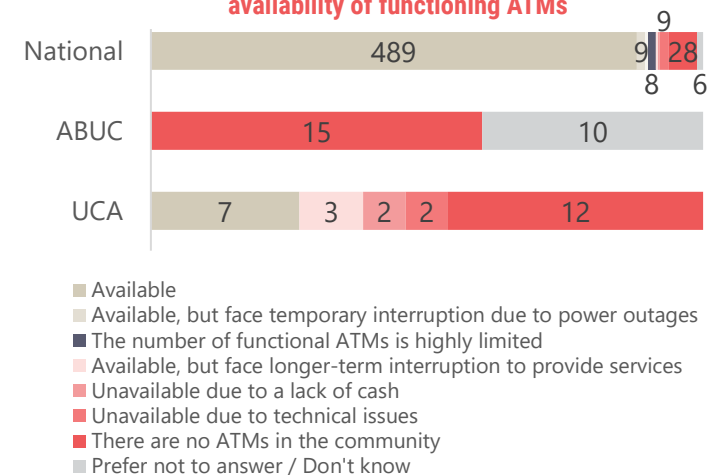


Figure 4: # of customer KIs reporting availability of functioning ATMs



Retailer Operation Findings

- ABUC retailer KIs were reportedly experiencing greater challenges related to insecurity, movement restrictions, and supplier prices, while UCA were struggling with electrical outages (table 2). Challenges in both areas contribute to possible difficulty maintaining stock for retailers, and to specific challenges with resupplying unavailable items due to security and price in ABUC.** 13 of 25 ABUC retailer KIs reported movement restrictions impacting operations since the start of the full-scale war as compared to 4 of 15 in UCA, which is the largest difference found between ABUC and UCA. Moreover, the overwhelming majority of retailer KIs in both areas reported expecting new challenges (UCA 12 of 15, ABUC 25 of 25)
- Higher proportions of retailer KIs reported operational instability in ABUC than in UCA. Retailer KIs in ABUC were more likely to report low proportions of stores operating (25%-50%) while their counterparts in UCA reported between 75%-100% of stores operating.** Further, a lower proportion of ABUC retailer KIs reported full availability of goods, and time reportedly needed to resupply was on average longer (table 3). ABUC customers may struggle to access goods both due to their availability and the cost of key items (table 1). Customers may need to travel longer distances to access operational and well-stocked stores, putting themselves at risk of shelling, checkpoints, and other protection threats.
- Main expected challenges to maintaining operations reported by UCA retailer KIs were financial, which indicates that cash assistance may continue to be an important aid modality in UCA.** Rising prices (12 of 15), reduced purchasing power (10 of 15), and reduced availability of cash (7 of 15) were the most reported expected difficulties to maintaining operations. Higher proportions of UCA retailer KIs reported these than ABUC retailer KIs (table 2).
- Higher proportions of retailer KIs in ABUC reported limited availability of JMMI basket items than in UCA.** Availability was reported to be particularly limited for baby products in both ABUC and UCA (table 3). In ABUC, they were also found to be particularly expensive, with cereal for babies and diapers being the two goods with the greatest difference in price between ABUC and UCA (table 1). In addition, chicken and toothpaste were also reported as not fully available by considerable proportions of retailers KIs in ABUC, and considerably more expensive in ABUC than in UCA.

Table 2: Top retailer difficulties impacting operations since start of full scale war

	National	Zaporizka UCA	Zaporizka ABUC
Top Four Current Challenges	n=448	n=15	n=25
No new difficulties	362/448	2/15	0/25
Difficulties with the prices charged by suppliers	46/448	5/15	11/25
Difficulties related to movement restrictions	25/448	4/15	13/25
Difficulties related to physically dangerous conditions in the area	19/448	7/15	14/25
Difficulties related to the storage of goods during the absence of electricity	12/448	6/15	7/25
Top Four Expected Challenges	n=448	n=15	n=25
No new changes	208/448	3/15	0/25
Rising prices	202/448	12/15	10/25
Reduced availability of cash	23/448	7/15	5/25
Reduced purchasing power of customers	177/448	10/15	13/25
Reduced mobility of customers	34/448	4/15	12/25

of retailer KIs reporting infrastructure damage in stores/markets

National 23/448 | **UCA** 2/15 | **ABUC** 4/25

of retailer KIs reporting damage/blockades to roads to markets

National 21/448 | **UCA** 1/15 | **ABUC** 4/25

Average # of days reportedly needed for stores to restock

National 1.6 days | **UCA** 2 days | **ABUC** 3 days

Table 3: Availability and supply of JMMI items reported by retailer KIs

JMMI Basket Item	National Full Availability	Zaporizka UCA Full Availability	Zaporizka ABUC Full Availability	National Stock Level (days)	UCA Stock Level (days)	ABUC Stock Level (days)	National Days Needed to Resupply	UCA Days Needed to Resupply	ABUC Days Needed to Resupply
Food									
Bread	323/323	13/13	21/22	2-3	4-5	2-3	1	1	1
Buckwheat	312/322	14/14	16/21	6-7	4-5	6-7	1.6	2	3
Cabbage	309/315	13/13	20/22	6-7	4-5	4-5	1.4	2	3
Carrots	308/312	11/11	19/22	6-7	4-5	4-5	1.4	2	2.5
Chicken (legs)	310/315	14/14	11/22	2-3	6-7	6-7	1.5	2	4
Complementary cereal for babies	273/299	4/10	2/10	6-7	6-7	6-7	1.8	2	4.4
Drinking water	328/330	14/14	20/22	6-7	4-5	4-5	1.6	2	2
Eggs (chicken)	319/323	11/11	16/22	4-5	4-5	2-3	1.4	2	2
Milk (2.5%)	321/323	14/14	17/22	4-5	4-5	4-5	1.4	2	2
Oil (sunflower)	326/326	14/14	18/21	6-7	4-5	6-7	1.6	2	3
Onion	313/317	12/12	19/22	6-7	4-5	4-5	1.4	2	2.5
Potato	309/315	11/11	21/22	6-7	4-5	4-5	1.4	2	2.5
Rice (round)	322/322	14/14	16/21	6-7	6-7	6-7	1.6	2	3.5
Wheat flour (white)	322/322	14/14	19/21	6-7	4-5	6-7	1.6	1	3
NFI									
Body soap	332/334	14/14	18/21	8-14	6-7	6-7	1.9	2	3
Infant diapers (size 3)	293/320	7/12	5/10	6-7	6-7	6-7	2	2	5
Hygiene/sanitary pads	355/359	13/13	15/21	8-14	N/a	6-7	2.1	2	3
Laundry soap	320/323	13/13	17/21	8-14	6-7	6-7	2	2	3
Toothpaste	353/357	14/14	14/21	8-14	N/a	6-7	2.1	2	3.3
Washing powder (machine)	330/332	13/13	16/21	6-7	6-7	6-7	2	2	3.5

Methodology

Data collection is a joint, partner-led exercise carried out once per month by participating CWG members across the country. The methodology for collecting primary data focuses on quantitative, structured interviews with purposively sampled interviewees. Two harmonized questionnaires are used: one targeting retail market traders who act as key informants (KIs) for their respective markets, and another targeting customers in monitored stores and marketplaces for individual interviews.

Field teams must aim to collect a minimum of three prices per item per assessed hromada, interviewing retailer KIs until this threshold is met, and must also submit a minimum of five customer KI interviews per assessed hromada. Only the price of the least expensive commonly purchased brand or variety is recorded for each item. All data is collected by field staff trained on the common JMMI methodology and tools; it is then submitted to a common CWG KoBo server and is cleaned and analyzed by REACH on behalf of the CWG.

Secondary data, in particular data from the State Statistics Service of Ukraine, are also integrated into the JMMI and used for triangulation where possible.

The prices reported in this factsheet are 'location medians', designed to minimize the effects of outliers and unequal numbers of prices submitted from diverse locations. First, the median prices of each assessed item is calculated within each assessed hromada; then, for each item, REACH calculates the median of this list of hromada-level medians across larger geographical areas (raions, oblasts, regions, and the whole of Ukraine).

More details on the methodology can be found in the [JMMI terms of reference](#) (ToR).

Challenges and Limitations

As the JMMI relies on purposive sampling methodologies, the results must be regarded as indicative and not representative. Furthermore, results are indicative only of market conditions during the time frame in which they were collected.

The JMMI methodology records the price of the least expensive commonly purchased brand or variety available in the store for each item. As brand availability may vary from area to area, price comparisons across areas may sometimes be based on slightly varying products.

In some cases, partners were unable to collect the minimum number of retailer KI or customer KI interviews required by the JMMI methodology. Where necessary, imputation from raion-level or oblast-level medians was used to compensate for missing prices and enable the cost of the JMMI basket to be calculated.

While the JMMI's remote monitoring methodology produces reliable data on prices and availability, further data on market functionality cannot be collected using this methodology.

As the JMMI continues to expand into new hromadas, some changes in the overall median prices may be driven by shifts in coverage rather than by true price.

About REACH

REACH Initiative 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. The methodologies used by REACH include primary data collection and in-depth analysis, and all activities are conducted through inter-agency aid coordination mechanisms. REACH is a joint initiative of IMPACT Initiatives, ACTED and the United Nations Institute for Training and Research - Operational Satellite Applications