FACTSHEET

Joint market monitoring initiative (JMMI)

September, 2023
Ukraine

KEY MESSAGES

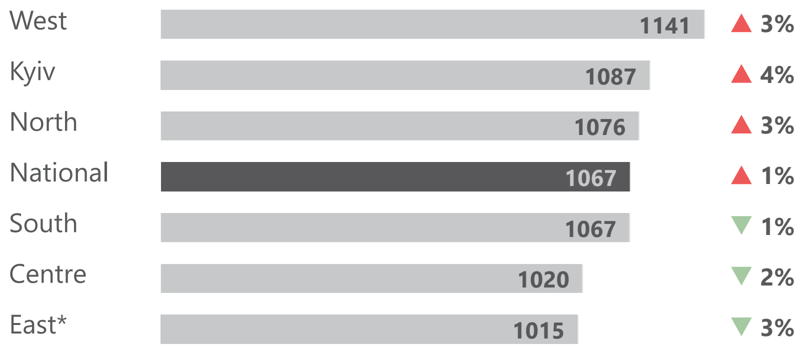
- **Access to winter essentials, like warm clothes and heating fuel, posed the most significant challenges for respondents in Zaporizka oblast,** with 33% and 38% of surveyed customers, respectively, reporting that they were either totally unavailable or limitedly available. Furthermore, issues related to access to food, hygiene items, and medications were more frequently reported in this oblast.
- **Prices for all types of vehicle fuels continued their upward trend,** marking a 5% monthly increase and limiting market access for 18% of customer Key Informants (KIs).
- **Affordability remained a key issue, as 54% of customer KIs reported price increases as their primary financial barrier to accessing goods.** The most concerning situation was found in Sumska oblast and Kyiv, with 100% and 80% of customer KIs, respectively, citing challenges related to increased prices. Additionally, in Chernihivska and Zaporizka, 77% and 71% of customer KIs, respectively, indicated increased prices, with 40% and 48% of them mentioning their inability to afford items.
- **Retailers in the North expressed the highest concerns about rising prices (92%) and a decline in customers' purchasing power (77%) in the coming months.** This concern was particularly pronounced in Chernihivska (100%).
- **Security-related factors limited retailers' activity in the South, especially in areas closer to the frontline, such as Khersonska and Zaporizka oblasts.** Customers in the South and East, particularly in Zaporizka, Khersonska, and Kharkivska oblasts, were more likely to report physical barriers to accessing stores, such as active fighting or shelling, restricted movement, and feeling unsafe in shops or on the roads to them.
- **Customer KIs in the South faced challenges in accessing financial services,** primarily due to the scarcity of functioning banks (reported by 42% of customer KIs) and ATMs in their communities (28%).

1067 UAH

Cost of JMMI basket

28.03 USD (▼ 1%) 26.09 EUR (▲ 1%)

Median values of the full JMMI baskets in September 2023, UAH



JMMI in September 2023:

- **10** participating partners
- **1208** interviews conducted
  - **518** retailers surveyed
  - **690** customers surveyed (**42%** men and **58%** women)
- **23** *oblasts* monitored
- **129** *hromadas* monitored

* East includes Kharkivska, Luhanska, and Donetska oblasts.
** Please find the methodology overview on page 13.

CONTEXT & RATIONALE

Since 24 February 2022, the full-scale war across Ukraine has prompted mass displacement and humanitarian crisis. Given the prominence of multi-purpose cash as a modality for assistance, market monitoring is a key initiative to ensure humanitarian intervention is effective, sustainable and does not harm local markets. Due to the ongoing full-scale war in Ukraine, humanitarian market data is limited and incomplete, especially from conflict-affected areas. The Joint Market Monitoring Initiative (JMMI) seeks to fill this information gap by providing useful and timely data on price trends and market functionality indicators.

ASSESSMENT OVERVIEW

The goal of the JMMI is to:

- Track prices and availability of basic commodities in Ukraine markets on a monthly basis.
- Assess the impact of the current humanitarian crisis on market systems in Ukraine.
- Contribute to a broader understanding of the market environment in Ukraine for the benefit of humanitarian actors across all sectors.

METHODOLOGY:
Marketplaces across Ukraine are assessed on a monthly basis. In each location, field teams record prices and other market indicators through retailer and customer key informants (KIs) interviews that characterize monthly changes in the local markets.**

REACH Informing more effective humanitarian action

AVAILABILITY OF GOODS

Food and hygiene items

In September, food and hygiene items were reported to be widely available, with only 1% of surveyed customers across the country reporting limited availability (see Figure 1 and Figure 2). Insufficient quantities of food and hygiene items were predominantly reported in Zaporizka oblast, where 14% of customer KIs noted shortages in food items and 24% in hygiene items. Similarly, in Volynska oblast, 15% of customer KIs reported shortages in both food and hygiene items.

Medications

Regarding over-the-counter medication, the situation remained almost unchanged in September: similar to August, 93% of customer KIs reported full availability (as displayed in Figure 3).

Some availability issues were observed in specific regions. In Zaporizka oblast, 29% of customer KIs indicated either the absence of medication or limited availability. In Volynska oblast, 25% of respondents reported its limited availability. Additionally, in Vinnytska and Rivnenska oblasts, 15% of respondents noted that medication was not fully available.

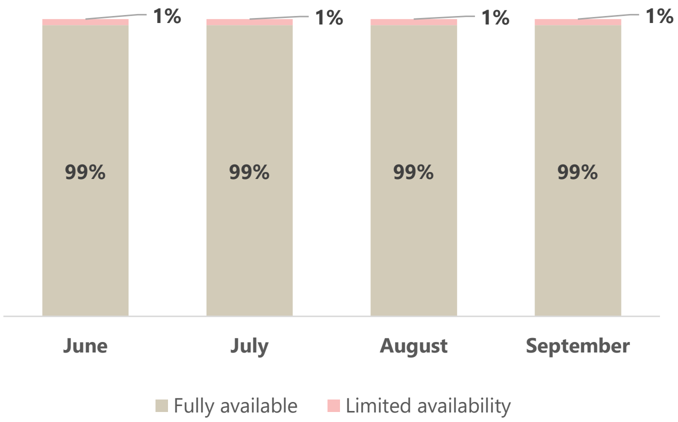
Warm clothes

The survey findings indicate ongoing challenges in accessing warm clothes in the East and South, which is crucial with the onset of the cold season. **Of particular concern is the situation in areas near the frontline such as Zaporizka, Khersonska, and Kharkivska oblasts,** where 33%, 21%, and 20% of customer KIs, respectively, indicated that warm clothes were not fully available* to them in September.

Moreover, respondents in western and central oblasts also mentioned difficulties in accessing warm clothes in their local stores or markets. These challenges were particularly prevalent among residents of Dnipropetrovska, Vinnytska, and Volynska oblasts (15% in each oblast).

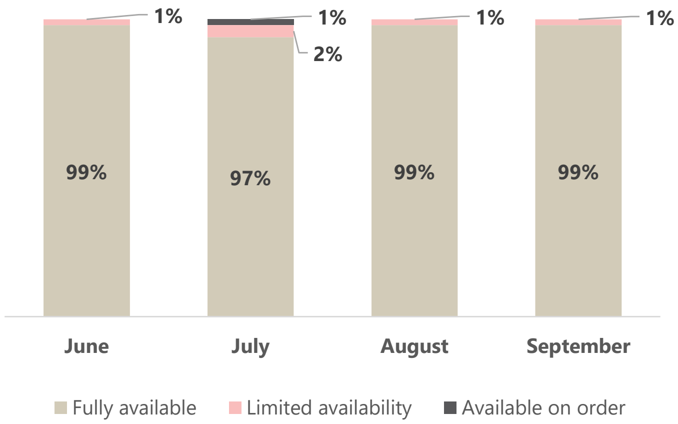
** Note: This option includes the responses "not available", "limited availability", and "available on order".*

Figure 1: % of customer KIs reporting availability of food items, national



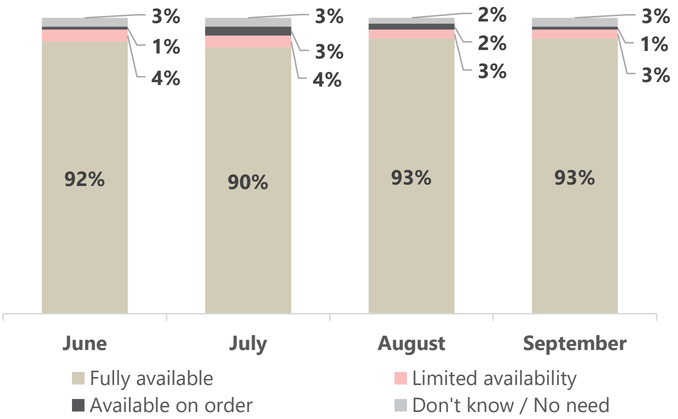
Source: JMMI

Figure 2: % of customer KIs reporting availability of hygiene items, national



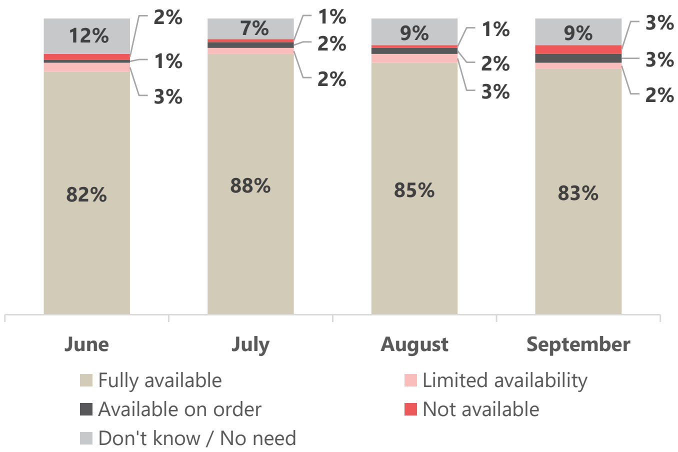
Source: JMMI

Figure 3: % of customer KIs reporting availability of over-the-counter medications, national



Source: JMMI

Figure 4: % of customer KIs reporting availability of warm clothes, national



Source: JMMI

AVAILABILITY OF ENERGY RESOURCES AND MARKET PRICES

Availability

Due to a sufficient market supply, vehicle fuel was reported as fully available nationally by the majority of the customer KIs (81%) in September (see Figure 5). Nevertheless, some availability issues were noted in Vinnytska oblast, where 23% of respondents indicated either the absence of vehicle fuel or limited availability.

Regarding heating fuel, the situation has slightly improved nationally compared to the previous month. In August, 78% of customer KIs reported full availability of heating fuel, and this proportion increased to 82% in September (as displayed in Figure 6).

However, **despite the overall improvement, there is a particular concern about the situation in Zaporizka oblast, where 19% of customer KIs reported a lack of heating fuel, and an additional 19% reported limited availability.** Additionally, a minority of customer KIs in the southern, eastern, and central regions (specifically in Dnipropetrovska, Kharkivska, Khersonska, Mykolaivska, Odeska, and Vinnytska oblasts) reported availability issues. Similar to previous months, in Chernihivska oblast, 20% of customer KIs could only purchase heating fuel through ordering.

Figure 5: % of customer KIs reporting availability of vehicle fuel, national

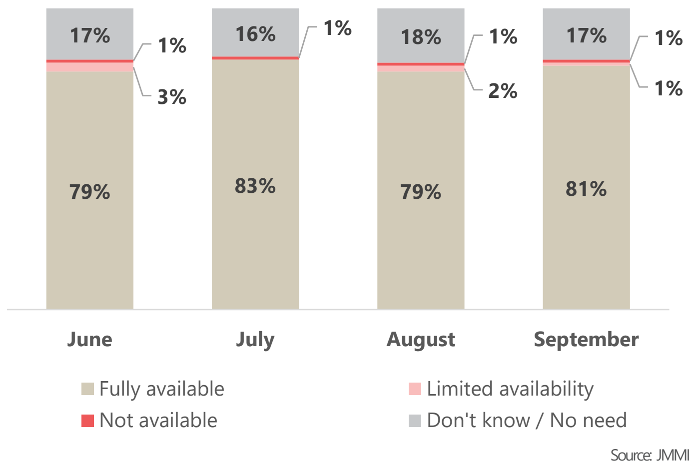
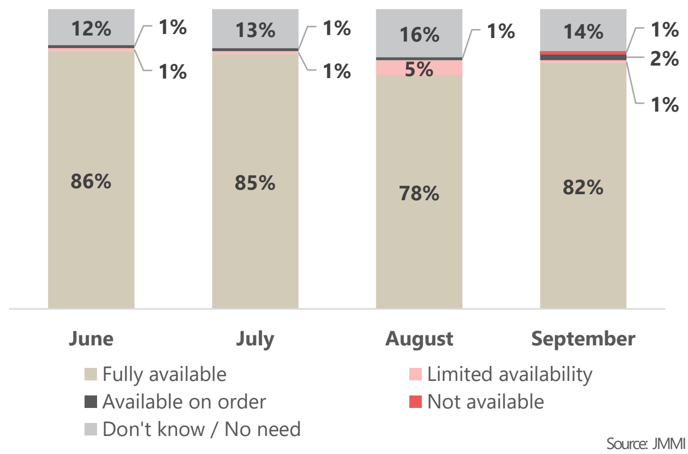


Figure 6: % of customer KIs reporting availability of heating fuel, national



Market prices

Fuel prices exceeded last year's level in September. The National Bank of Ukraine (NBU) estimates that fuel price growth has accelerated amid rising global oil prices[1].

According to the State Statistics Service of Ukraine (SSSU)[2], in September compared to August, average consumer prices for all vehicle fuels such as diesel, petrol A-92, petrol A-95, and liquefied petroleum gas (LPG) rose by 5%.

According to the JMMI customer KIs survey, respondents reported that the estimated prices of petrol and diesel purchased through unofficial sources were lower than those obtained through official sources. Specifically, they indicated that petrol and diesel could be bought through official sources at 54 UAH per liter and 53 UAH per liter respectively. In contrast, through unofficial sources, petrol was priced at 52 UAH per liter, and diesel was priced at 51 UAH per liter.

Since the beginning of the full-scale war in February 2022, the prices for natural gas, used by customers for heating and cooking purposes, have remained stable at 8 UAH per cubic meter across the country. For the fourth consecutive month, the price of electricity has remained at 2.64 UAH per kWh, which is more than 1.5 times higher than it was at the beginning of the year.

In September, the median price of firewood decreased by 1% compared to August, reaching 1,360 UAH per cubic metre (as depicted in Figure 8). The highest prices were observed in the South, where firewood was priced at 2,200 UAH per cubic metre.

Figure 7: Average consumer price for vehicle fuel, national, UAH per liter

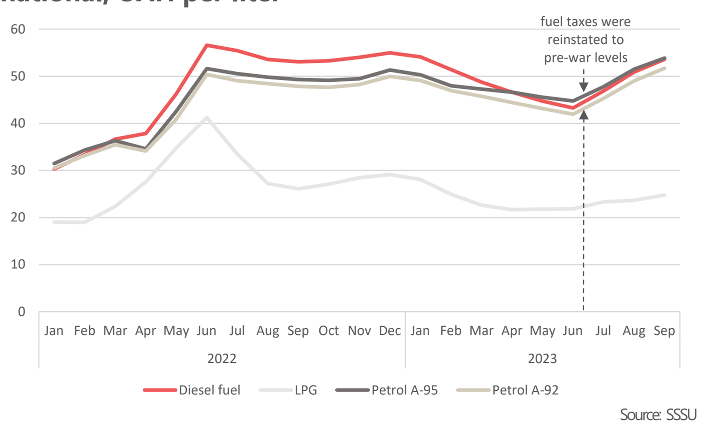
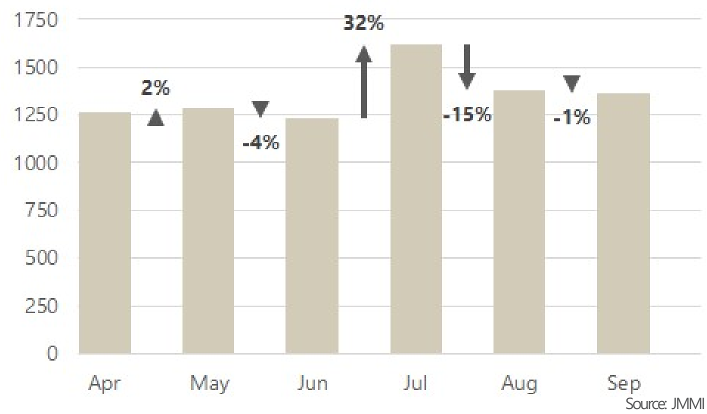


Figure 8: Median price for firewood, national, UAH per cubic metre



THE BASKET

The median value of the full JMMI basket

The JMMI Basket is a subset of the 335-item consumer set of goods (and services) maintained by the State Statistics Service of Ukraine (SSSU), focusing on core food and hygiene items that an average household must purchase regularly. The JMMI Basket was defined in consultation with the Ukraine Cash Working Group (CWG).

The national-level calculation of the full JMMI basket in September revealed a 1% increase compared to August, remaining 6% higher than the prices in September 2022 (see Figure 9).

The most expensive JMMI basket was calculated based on prices reported in the West (1141 UAH), followed by Kyiv (1087 UAH) and North (1076 UAH), whereas JMMI basket prices were reported to be the lowest in the East (1015 UAH).

At the oblast level, the highest costs of the JMMI basket were reported in Sumska (1217 UAH), Lvivska (1192 UAH), and Khersonska (1183 UAH) oblasts.

An increase in prices compared to previous month for all items within the JMMI basket was reported by 25% of retailer KIs in Zaporizka, 18% in Ivano-Frankivska, and 6% in Sumska oblasts.

JMMI BASKET

Food

Bread	500 g
Buckwheat	1 kg
Cabbage	1 kg
Carrots	1 kg
Chicken (legs)	1 kg
Complementary cereal for babies	200 g
Drinking water	1 bottle (1.5 L)
Eggs (chicken)	10 pcs
Milk (2.5%)	900 ml
Oil (sunflower)	900 ml
Onion	1 kg
Potato	1 kg
Rice (round)	1 kg
Wheat flour (white)	1 kg

Non-food items (NFIs)

Body soap	1 bar (75 g)
Diapers (infant size 3)	1 pack (40-60 pcs)
Hygiene/sanitary pads	1 pack (10 pcs)
Laundry soap	1 bar (200 g)
Toothpaste	1 tube (75 ml)
Washing powder (machine)	1 box (500 g)

Prices

The cost of the food basket decreased in all regions except the South, where it remained at the level of the previous month. Nationally, it amounted to 517 UAH, a 2% decrease compared to August.

As in the previous month**, the decline in food prices was primarily attributed to a decrease in the prices of vegetables, namely: carrots (by 36%), onions (by 36%), cabbage (by 15%), and potatoes (by 13%). Vegetable prices continued to fall at a significant pace due to good harvests of most types of vegetables, thanks to favorable weather and larger production volumes in some regions**[3].

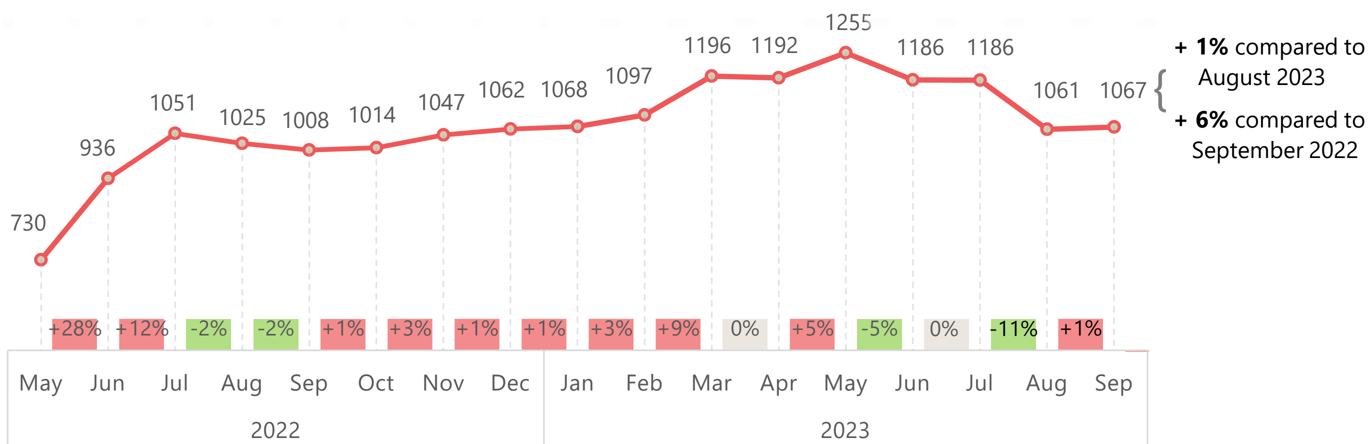
Meanwhile, egg prices continued to rise across the country (by 14% in September compared to August).

The most expensive food basket was calculated based on prices reported by retailers in Kyiv (551 UAH), while the cheapest was in the East (478 UAH).

The cost of the non-food (hygiene) basket amounted to 550 UAH across the country in September, representing a 4% increase compared to August. This increase in the cost of the NFI basket was observed in most regions, with the most significant growth in Kyiv and the North (by 10% in each region). At the same time, in the Centre and South, the cost of the NFI basket slightly decreased (by 2% and 1%, respectively).

The most expensive NFI basket was recorded in the West, totaling 618 UAH,

Figure 9: Monthly evolution of the JMMI basket price (in UAH)



Source: JMMI

Map 1: Median prices (UAH) of food and non-food baskets in September 2023, by oblast

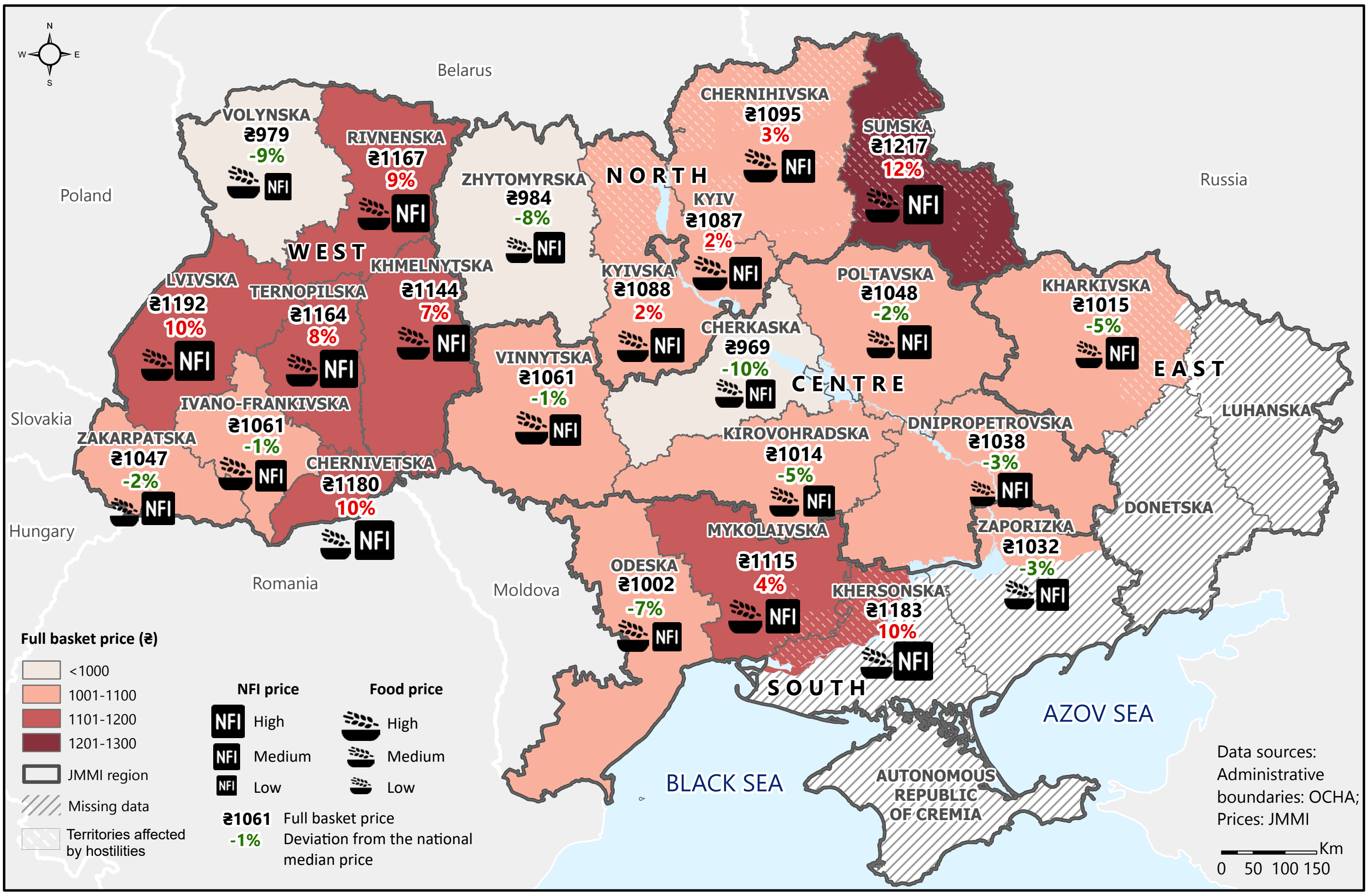


Table 1: Median prices (UAH) of food basket in September 2023 by region

		West		Centre		South		North		Kyiv		East		National	
Item	**Unit**	Median price	1 month change	Median price	1 month change	Median price	1 month change	Median price	1 month change	Median price	1 month change	Median price	1 month change	Median price	1 month change
Bread	500 g	19	7%	18	6%	19	0%	18	-7%	21	1%	15	-13%	18	0%
Buckwheat	1 kg	42	-1%	38	-13%	54	-5%	44	-8%	42	-8%	37	-17%	42	-6%
Cabbage	1 kg	11	-4%	9	-14%	12	-3%	9	-19%	10	-23%	9	-42%	10	-15%
Carrots	1 kg	13	-37%	12	-25%	14	-8%	10	-45%	11	-43%	10	-47%	12	-36%
Chicken (legs, fresh)	1 kg	110	3%	108	-1%	99	4%	111	5%	129	4%	88	-8%	109	2%
Complementary cereal	200 g	89	-9%	85	0%	71	9%	90	0%	100	4%	95	15%	90	2%
Eggs (chicken)	10 pcs	47	19%	43	15%	45	2%	44	16%	44	17%	44	12%	44	14%
Milk (2.5%, fresh)	900 ml	32	2%	31	-1%	33	-3%	31	-1%	30	-1%	30	-11%	31	-1%
Oil (sunflower, refined)	900 ml	52	3%	50	0%	56	-4%	52	-9%	50	-1%	49	-12%	51	-4%
Onions	1 kg	14	-31%	12	-28%	14	-11%	12	-33%	12	-39%	11	-46%	12	-36%
Potatoes	1 kg	11	-10%	10	-9%	12	-1%	10	-18%	12	-8%	10	-34%	10	-13%
Rice (round)	1 kg	51	-8%	52	2%	54	-1%	54	3%	54	-5%	47	-10%	53	-2%
Water	1.5 L	14	-3%	14	14%	17	6%	16	-5%	15	2%	16	12%	16	6%
Wheat flour (white)	1 kg	18	0%	15	0%	19	-3%	18	-7%	21	2%	16	2%	18	-3%
Total		**523**	-3%	**499**	-2%	**518**	0%	**520**	-3%	**551**	-2%	**478**	-9%	**517**	-2%

Source: JMMI

Map 2: Median prices (UAH) of food baskets in September 2023, by oblast

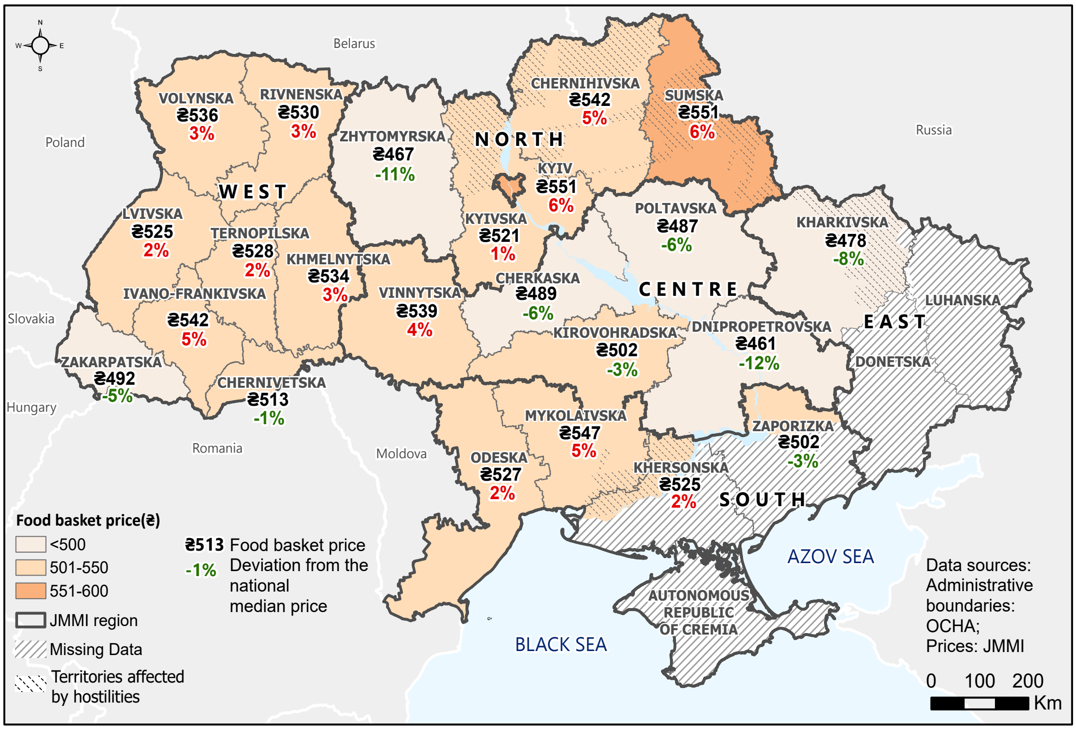


Table 2: Median prices (UAH) of non-food (hygiene) basket in September 2023 by region

		West		Centre		South		North		Kyiv		East		National	
Item	**Unit**	Median price	1 month change	Median price	1 month change	Median price	1 month change	Median price	1 month change	Median price	1 month change	Median price	1 month change	Median price	1 month change
Body soap	1 bar (75 g)	15	0%	12	3%	15	-5%	12	-8%	12	0%	12	-7%	12	-8%
Diapers (infant, 5-9 kg)	1 pack (40-60 pcs)	446	12%	364	-5%	388	-2%	398	14%	398	16%	398	6%	393	4%
Hygiene/sanitary pads	1 pack (10 pcs)	44	2%	40	2%	38	11%	39	3%	37	-3%	37	-7%	39	3%
Laundry soap	1 bar (200 g)	22	12%	21	3%	21	-5%	21	4%	21	-7%	21	-2%	21	1%
Toothpaste	1 tube (75 ml)	41	-1%	36	2%	34	2%	34	-9%	26	-12%	26	-19%	35	3%
Washing powder	1 box (500 g)	50	-1%	48	7%	52	1%	51	8%	41	-1%	41	-7%	49	6%
Total		**618**	9%	**521**	-2%	**549**	-1%	**556**	10%	**536**	10%	**536**	2%	**550**	4%

Source: JMMI

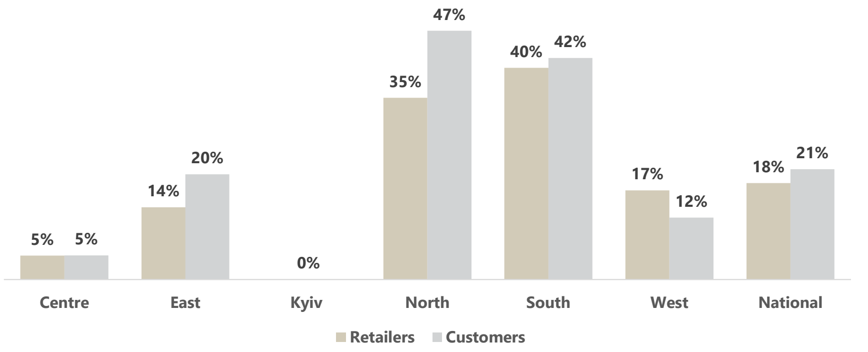
ACCESS TO STORES

Physical access to stores

In September at the national level, **21% of customer KIs indicated that the full-scale war was affecting their ability to physically access stores or marketplaces** (among retailer KIs, the figure was slightly lower, i.e. 18%). The highest percentages were found in the North and South, where 47% and 42% of customer KIs, respectively, reported difficulties in accessing shops (see Figure 10).

The primary reason for the difficulty in accessing markets across the country was air alerts, indicated by 13% of the surveyed customers, with the highest percentage in the North (45%). Notably, 93% of surveyed customers in Chernihivska and 70% in Sumska oblasts mentioned that stores or marketplaces in their area faced temporary interruptions due to air alerts.

Figure 10: % of customer and retailer KIs reporting that the full-scale war has affected the ability to access shops, by region



Source: JMMI

Security-related factors had a significant impact on customer KIs' access to stores in southern and eastern areas near the frontline. Specifically, active fighting or shelling was reported by 57% of surveyed customers in Zaporizka and 38% in Khersonska oblasts, while movement restrictions related to martial law were indicated by 33% of respondents in Khersonska and 15% in Kharkivska oblasts. Thirty-eight percent of respondents in Zaporizka and 29% in Khersonska oblasts, as well as 10% in Kharkivska oblast, reported limiting their access to local shops and markets in September due to feeling unsafe while being in or approaching shops due to the fear of being targeted.

Furthermore, customer KIs in Khersonska, Kharkivska, Mykolaivska, and Zaporizka oblasts reported **damages to buildings or infrastructure in stores or marketplaces, as well as damages or blockages on roads** leading to these locations.

Lack of transportation was an additional factor that physically limited the ability of 19% of surveyed customers in Zaporizka and Khersonska oblasts to reach shops or markets in their communities.

Moreover, 19% of retailer KIs in Zaporizka oblast faced **temporary interruption due to power outages.**

Financial factors

Financial factors continued to have a negative impact on customer KIs' access to stores and marketplaces across Ukraine, with 66% of respondents reporting this obstacle in September.

The main reported reasons for these challenges were price increases (54%) and the inability to afford items (18%). Specifically, 80% of respondents in Kyiv and 68% in the North cited price increases as their primary financial constraint. Moreover, 25% of customer KIs in the South and 23% in the East indicated that they could not afford items.

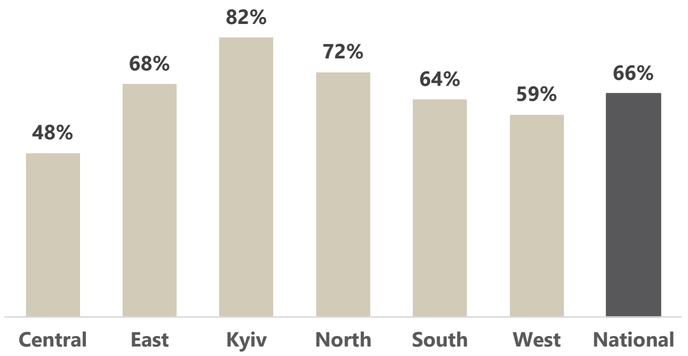
At the oblast level, **the most concerning situation was found in Sumska oblast, with 100% of respondents (n=30) indicating challenges related to increased prices. Similarly, in Chernihivska and Zaporizka oblasts, 77% and 71% of respondents, respectively, mentioned increased prices, along with 40% and 48% reporting their inability to afford items.**

The increase in fuel prices during July, August, and September had repercussions for customers, with 18% of survey respondents citing high fuel prices for their cars as one of the factors that limited their access to shops and markets.

Additionally, the high cost of public transport also served as a constraint, particularly in the South and West (reported by 11% of respondents in each region).

As a consequence, the issue of affordability remains crucial, especially in Kyiv, North and South, where it represents a barrier to accessing markets.

Figure 11: % of customer KIs reporting that financial factors have affected their access to stores or marketplaces, by region



Source: JMMI

During the interviews, field teams received comments from customers such as: "I started buying cheaper products", "I limit myself to buying only the necessary things", "I cannot afford the products I want".

According to a survey conducted by the Sociological Group "Rating" in September 2023 at national level, 60% of respondents have reported a decline in their personal economic situation over the past six months, while 21% of respondents expect it to deteriorate in the next 12 months[4]*.*

MARKET FUNCTIONALITY

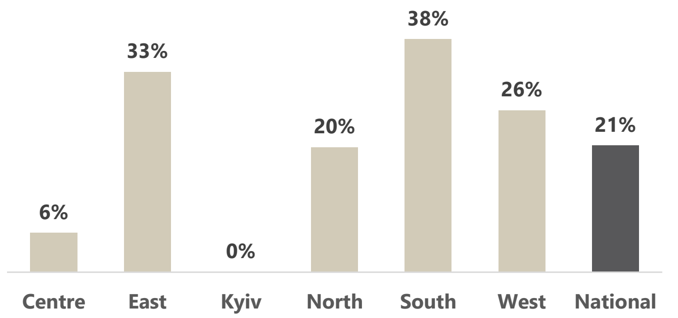
In September, 21% of retailer KIs reported difficulties in keeping their stores operational and well-stocked, a slight improvement from the reported 24% in August. Retailer KIs from the South and East faced difficulties more frequently than those in other regions of Ukraine (38% and 33%, respectively), as shown in Figure 12.

The main difficulty reported by retailers nationwide was high prices from suppliers (13%), with this being most frequently reported in the East (21%), North (19%), South (18%), and West (17%).

Physical hazards mainly affected retailers in the South and East, especially in areas throughout the frontline such as Khersonska and Zaporizka oblasts. Specifically, 52% of retailers surveyed in Khersonska and 50% in Zaporizka oblasts reported difficulties related to physically dangerous conditions. Movement restrictions limited activities for 48% of retailers surveyed in Khersonska, 33% in Zaporizka, and 10% in Kharkivska oblasts.

Retailers also faced challenges accessing money to pay suppliers, especially in Khersonska (43%), Zaporizka (33%), and Poltavska (29%) oblasts. Additional difficulties included core goods' availability, particularly in Zaporizka and Khmelnytska oblasts (17% in each). Full staffing was a concern in Lvivska (28%) and Zaporizka (17%) oblasts, and storing goods during power outages, mainly in Zaporizka (17%) and Kyivska (10%) oblasts.

Figure 12: % of retailer KIs reporting difficulties in keeping their store operational and well-stocked, by region



Source: JMMI

In September, retailer KIs were asked to estimate the percentage of retailers operating in their marketplace compared to pre-war levels. **In areas close to the frontline, the percentage of working retailers was reported to be slightly lower than in regions not directly impacted by ground military activities.** Specifically, it ranged from 25% to 50% in certain hromadas of Kharkivska, Khersonska, Mykolaivska, and Odeska oblasts (see map 3). The national range was from 75% to 100%.

Map 3: Approximated percentage of working retailers in September 2023 from the pre-war level, reported by retailer KIs, by hromada

Table 3: % of retailer KIs reporting on new challenges faced since the start of the full-scale war in February 2022, by type of challenge and region*

Type of challenge	Centre	East	Kyiv	North	South	West	National
Availability of core goods		1%		1%	4%	2%	1%
Price increase among suppliers	5%	21%		19%	18%	17%	13%
Liquidity to pay suppliers	2%	1%		2%	17%	3%	4%
Full staffing	2%	1%			4%	8%	2%
Movement restrictions		10%			17%		5%
Physical danger in the area					21%		3%
Storage of goods during the absence of electricity				4%	2%	1%	1%
Enough stock		1%		1%	1%	2%	1%
Other		4%					1%

* The percentages were obtained from multi-choice question

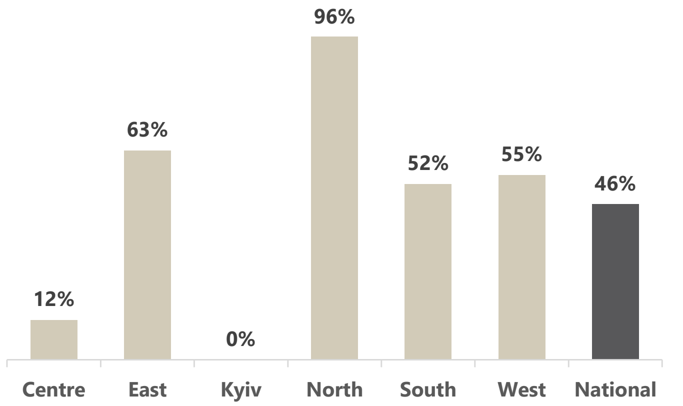
Source: JMMI

The survey findings indicate that **46% of retailers surveyed nationwide expected new challenges in the near future due to the full-scale war** (see Figure 13).

Among the most frequently anticipated challenges reported nationally were rising prices (40%), as well as declining customer purchasing power (35%). For these two challenges, at the level of regions, they were mostly reported in the North, 92% for rising prices and 77% for customer purchasing power. Survey findings showed **a concerning situation in Chernihivska oblast, where every retailer interviewed** (n=18) **expects higher prices from suppliers and a decline in customer purchasing power.**

Furthermore, 24% of retailer KIs in the North and 17% in the South expected reduced availability of cash. Additionally, 18% of retailer KIs in the North, 16% in the South, and 14% in the East anticipated a reduction in customer mobility. Moreover, 15% of retailer KIs in the North expected reduced availability of goods.

Figure 13: % of retailer KIs reporting anticipating new challenges due to the war, by region



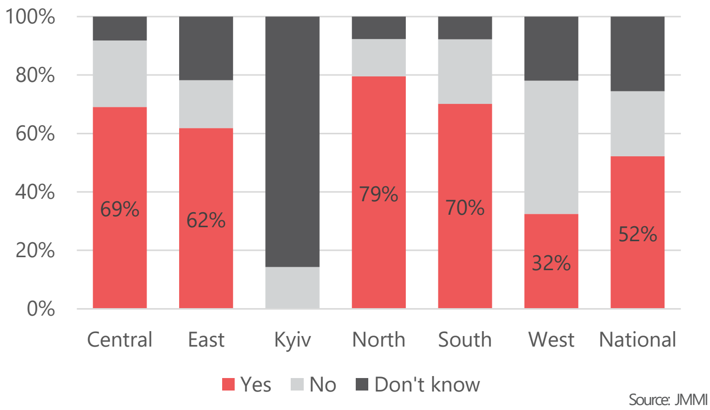
Source: JMMI

SUPPLY

In September, 52% of retailer KIs noted that their business depended on a single food supplier. The proportion of retailer KIs whose businesses mostly relied on a single supplier for core hygiene items was slightly lower (48%). This represents a potential source of vulnerability for the stores, as it could compromise their ability to maintain adequate stock.

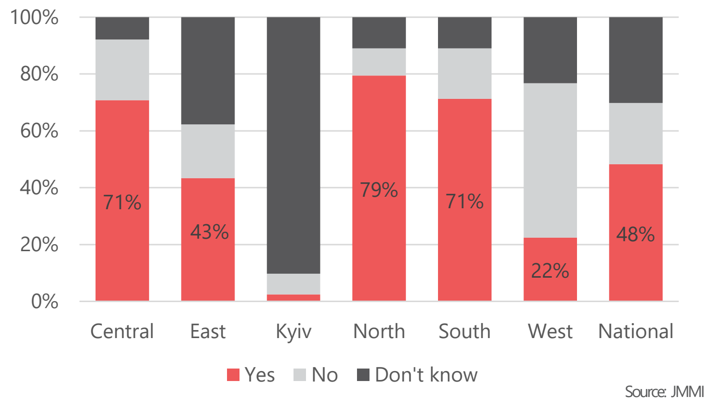
The greatest challenges in this regard were observed in the North, South, and Centre (Figure 14 and Figure 15). **The northern region seemed to be particularly exposed to that supply concern**, with 79% of retailers reporting that they most relied on one supplier for food or non-food items. Moreover, **retailers in Kyivska oblast were most at risk, as 100% of retailer KIs had only one food or non-food supplier** (n=27 for food and n=22 for NFI single supplier).

Figure 14: % of retailer KIs reporting that they mostly rely on a single supplier for food items, by region



Source: JMMI

Figure 15: % of retailer KIs reporting that they mostly rely on a single supplier for non-food (including hygiene) items, by region



Source: JMMI

FINANCIAL SERVICES

Banks

In September, 69% of customer KIs reported the full availability of bank branches offering all their services, a figure nearly identical to the previous month's 68%.

Air attacks reportedly continued to restrict the opening hours of bank branches across the country. Nineteen percent of customer KIs indicated that bank branches were unable to provide their usual services during air alerts, with the highest proportion reported in the Centre (37%), North (26%), and West (25%).

As in the previous months, **the greatest difficulties in accessing the full spectrum of banking services were experienced by respondents in the South, with 42% of surveyed customers indicating the absence of functioning banks in their communities.** These challenges were particularly reported the most in Zaporizka oblast (with 76% of respondents), followed by respondents in Khersonska (52%) and Mykolaivska (38%) oblasts.

ATMs

The percentage of customer KIs reporting the full availability of functioning ATMs slightly decreased from 91% in August to 89% in September.

The most notable access issues were observed in the South, where 28% of customer KIs reported the absence of ATMs in their communities, and 9% noted a highly limited number of functional ATMs. Challenges with the absence of ATMs were primarily faced the most by residents of Zaporizka oblast (76%), followed by Mykolaivska (31%), and Khersonska (21%). A limited number of ATMs predominantly impacted respondents in Khersonska oblast (21%).

Additionally, 9% of customer KIs in Khersonska oblast indicated that ATMs in their communities had technical issues or other problems.

Ukrposhta*

Nationwide, 78% of customer KIs reported that Ukrposhta offices operated daily and provided all of their regular financial services.

As in the previous months, **the survey findings did not indicate any significant restrictions on access to Ukrposhta branches.** The only point of inconvenience reported was that Ukrposhta offices did not operate during air alerts, which mostly affected customers surveyed in the Centre (33%), North (27%), and West (27%). Additionally, 11% of customer KIs in the South mentioned the availability of only mobile post offices in their communities.

Payment modalities

The main payment modalities accepted by retailer KIs in September were cash (100%), credit cards (89%), debit cards (73%), mobile apps (64%), and vouchers from the UN or NGOs (4%).**

Figure 17: % of customer KIs reporting availability of functioning bank branches, by region

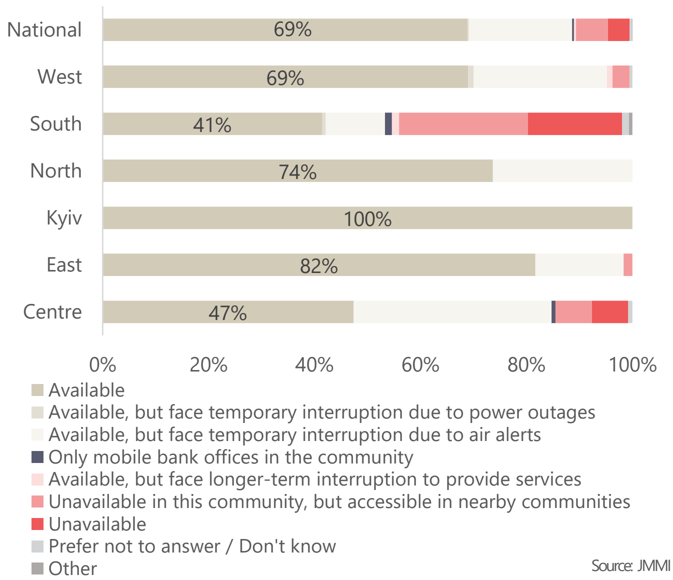


Figure 16: % of customer KIs reporting availability of functioning ATM, by region

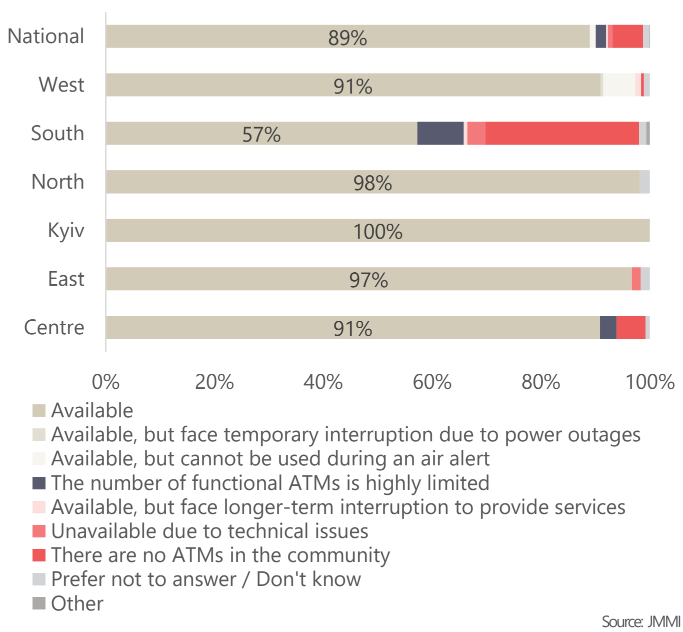
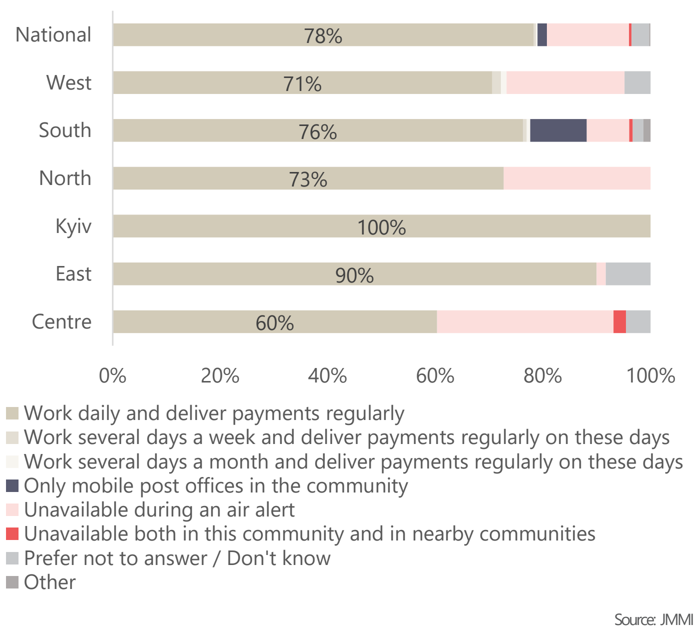


Figure 18: % of customer KIs reporting availability of functioning Ukrposhta offices, by region



* Ukrposhta is Ukraine's national post.
** The percentages were obtained from multi-choice question.

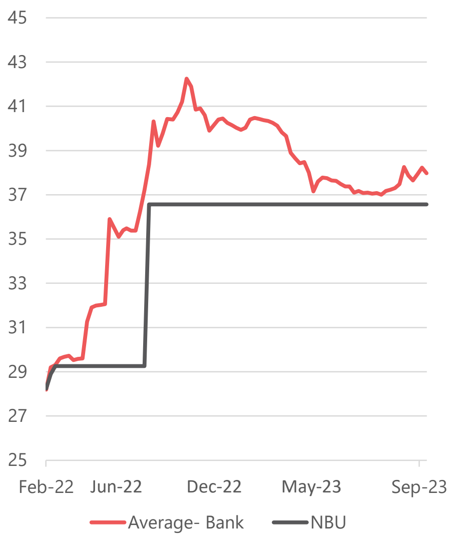
MACROECONOMICS

Inflation

The consumer price index increased by 0.5% in September compared to August (Figure 20). Moreover, it remained 3% higher than at the beginning of the year and 7.1% higher than in September 2022[5].

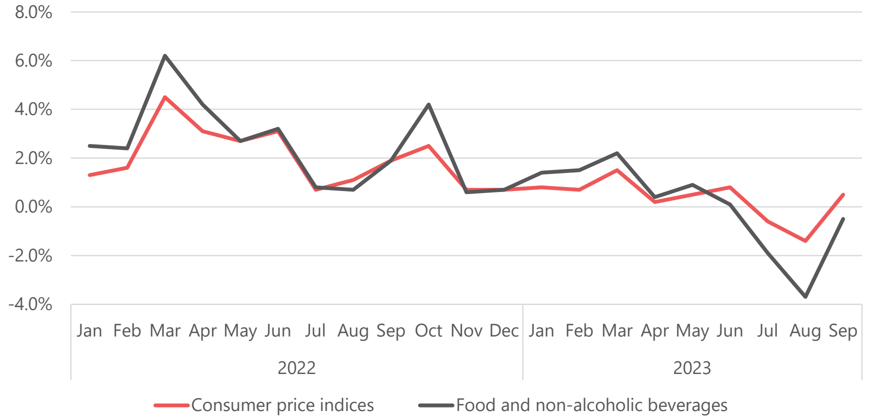
An important contribution in restraining inflationary pressure was played by an increase in the supply of food products, including fruits and vegetables from the new harvest, as well as by larger harvests of grains and oil crops, in particular, due to the faster pace of harvesting. Amid limited export opportunities, these factors influenced the prices of both raw and processed food products[3].

Figure 19: Mid-market exchange rate for the US Dollar (USD)



Source: MINFIN

Figure 20: Monthly inflation rate (%)



Source: SSSU

Economic activity

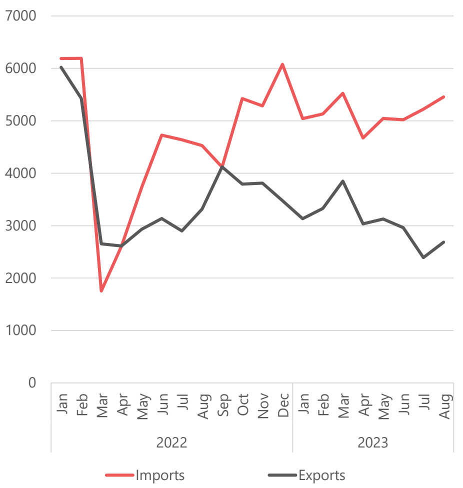
In September, economic activity was supported by an ongoing harvesting campaign, as well as related transportation and processing works of larger harvests than last year. Significant capital expenditures from the budget stimulated construction, which also supported railway transportation[1].

The negative balance of Ukraine's foreign trade in goods in January-August 2023 increased three times compared to the same period in 2022 (to $16.7 billion from $5.5 billion)[6].

According to the SSSU, Ukraine's exports of goods decreased by 15.3% to $24.5 billion in the period under review compared to January-August 2022, while imports increased by 19.6% to $41.1 billion.

Since the withdrawal from the grain deal, Russia has carried out 17 massive attacks, which has led to a 40% reduction in the export potential of Ukraine's ports[7].

Figure 21: Changes in gross value of exports and imports of Ukraine (million USD)



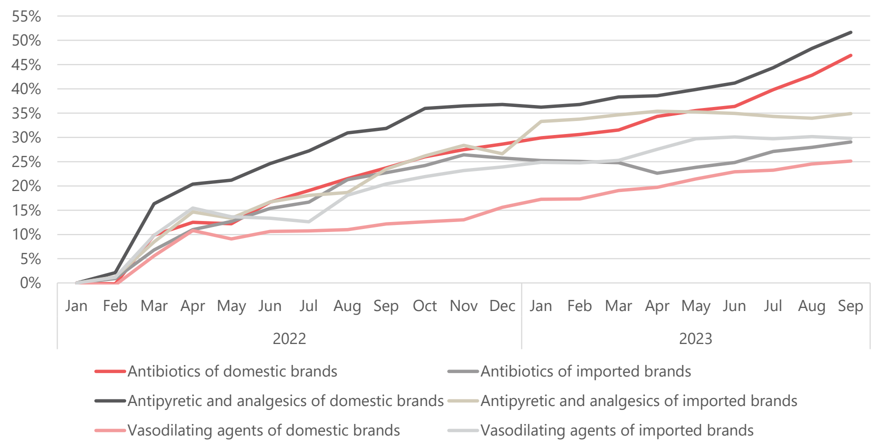
Source: SSSU

MEDICINE

According to the SSSU[2], in September, the average prices for basic medicines, such as antibiotics of domestic brands, witnessed a 3% increase. Similarly, prices for antipyretic and analgesics of domestic brands increased by 2% (Figure 22).

In a year-to-year comparison with September 2022, average prices for antibiotics of domestic brands showed a significant increase of 19%, followed by a 15% increase for antipyretic and analgesics of domestic brands and a 12% increase for vasodilating agents of domestic brands.

Figure 22: Cumulative price increase of selected medicines, national average, in % from January 2022



Source: SSSU

RENT

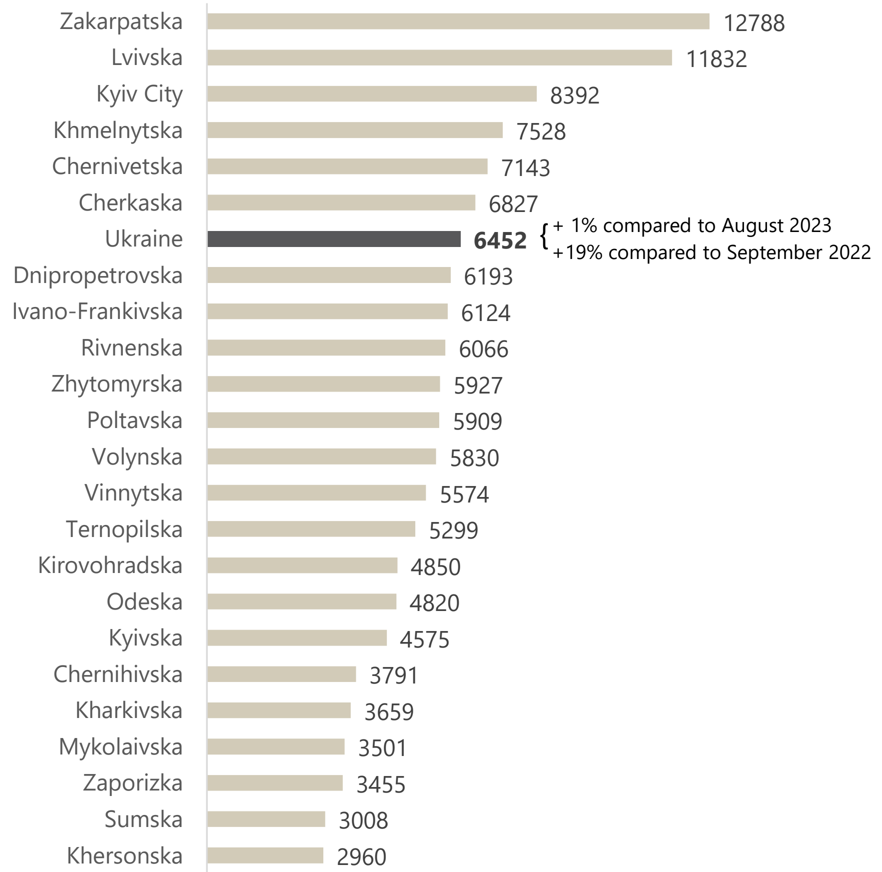
Rental prices for one-bedroom apartments in Ukraine continued to rise in September.

According to the data from the SSSU[2], during the month, the average rent for a one-bedroom apartment increased by 1% compared to August. The most substantial price increases were recorded in Zaporizka, Ivano-Frankivska, and Kharkivska oblasts (by 4% in each).

In a year-to-year comparison with September 2022, rental prices showed an overall increase of 19%, with the most remarkable increases occurring in Zakarpatska (89%), Lvivska (45%), and Zhytomyrska (43%) oblasts. However, it is worth noting that rental prices in Kharkivska, Zaporizka, and Kirovohradska oblasts decreased by 19%, 8%, and 5%, respectively.

The highest rental prices were observed in western oblasts, such as Zakarpatska (12,788 UAH) and Lvivska (11,832 UAH). In contrast, the lowest rental prices were found in areas close to the frontline or affected by ground shelling, such as Khersonska (2,960 UAH), Sumska (3,008 UAH), and Zaporizka (3,455 UAH).

Figure 23: Average monthly rent for a one-bedroom apartment (UAH) in September 2023, by oblast



Source: SSSU

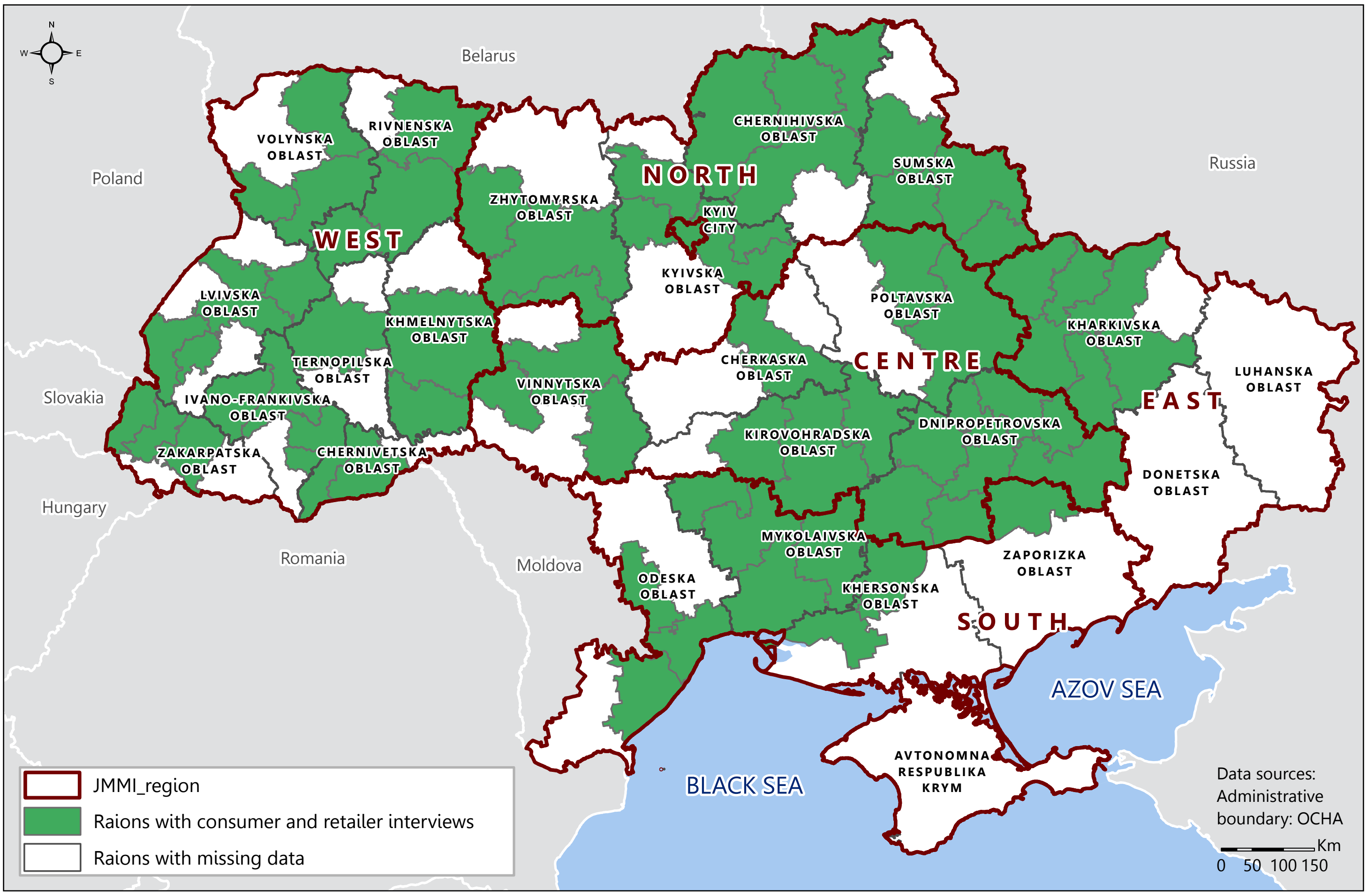
METHODOLOGY OVERVIEW

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).

ASSESSMENT COVERAGE



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.

ENDNOTES

[1] National Bank of Ukraine "Monthly Macroeconomic and Monetary Review, October 2023", 5 October 2023, available **here**

[2] State Statistics Service of Ukraine "Average consumer prices for goods (services) in Ukraine in 2023", 12 October 2023, available **here**

[3] National Bank of Ukraine "NBU September 2023 Inflation Update", 10 October 2023, available **here**

[4] Sociological Group "Rating" The twenty-fourth nationwide survey "Ukraine in times of war". Public sentiment and economic situation of the population" , 28 September 2023, available **here**

[5] State Statistics Service of Ukraine "Price indices", 9 October 2023, available **here**

[6] State Statistics Service of Ukraine "Ukraine's foreign trade in goods in January-August 2023", 13 October, available **here**

[7] Facebook, Minister of Infrastructure Oleksandr Kubrakov, 14 October 2023, available **here**

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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 Programme (UNITAR-UNOSAT).