ABOUT

In an effort to inform cash-based interventions and better understand market dynamics in Ukraine, the Joint Market Monitoring Initiative (JMMI) was created by the Ukraine Cash Working Group (CWG) in March 2022. The initiative is guided by the CWG Task Team 4 on Monitoring (CWG TT4), led by ACTED and REACH and supported by the CWG members.

Marketplaces across Ukraine are assessed on a monthly basis. In each location, field teams record prices and other market indicators through retailer and customer interviews. In addition to the interviews, REACH conducts online price monitoring across the country. This factsheet presents an overview of prices for key foods and non-food items (NFIs) in the assessed areas, as well as the costs associated with key elements of the JMMI Basket, which consists of 20 core food and hygiene items.

KEY FINDINGS

Vehicle fuel was reported to be fully available by only 9% of customers across the country, while 63% of customers reported limited availability

Increase of JMMI basket price seems to have spread from East and South to North and West

Price of wheat seems to be stabilizing as negotiations to resume exports advance

Availability of food and hygiene items is rising, but supply chains are less reliable with more vendors depending on a single supplier

Reported inflation continued to rise, particularly for food items which increased by 17% when compared to February 2022

Cost of JMMI basket

936 UAH ▲ +28%

26.36 USD ▲ +25%

25.03 EUR ▲ +24%

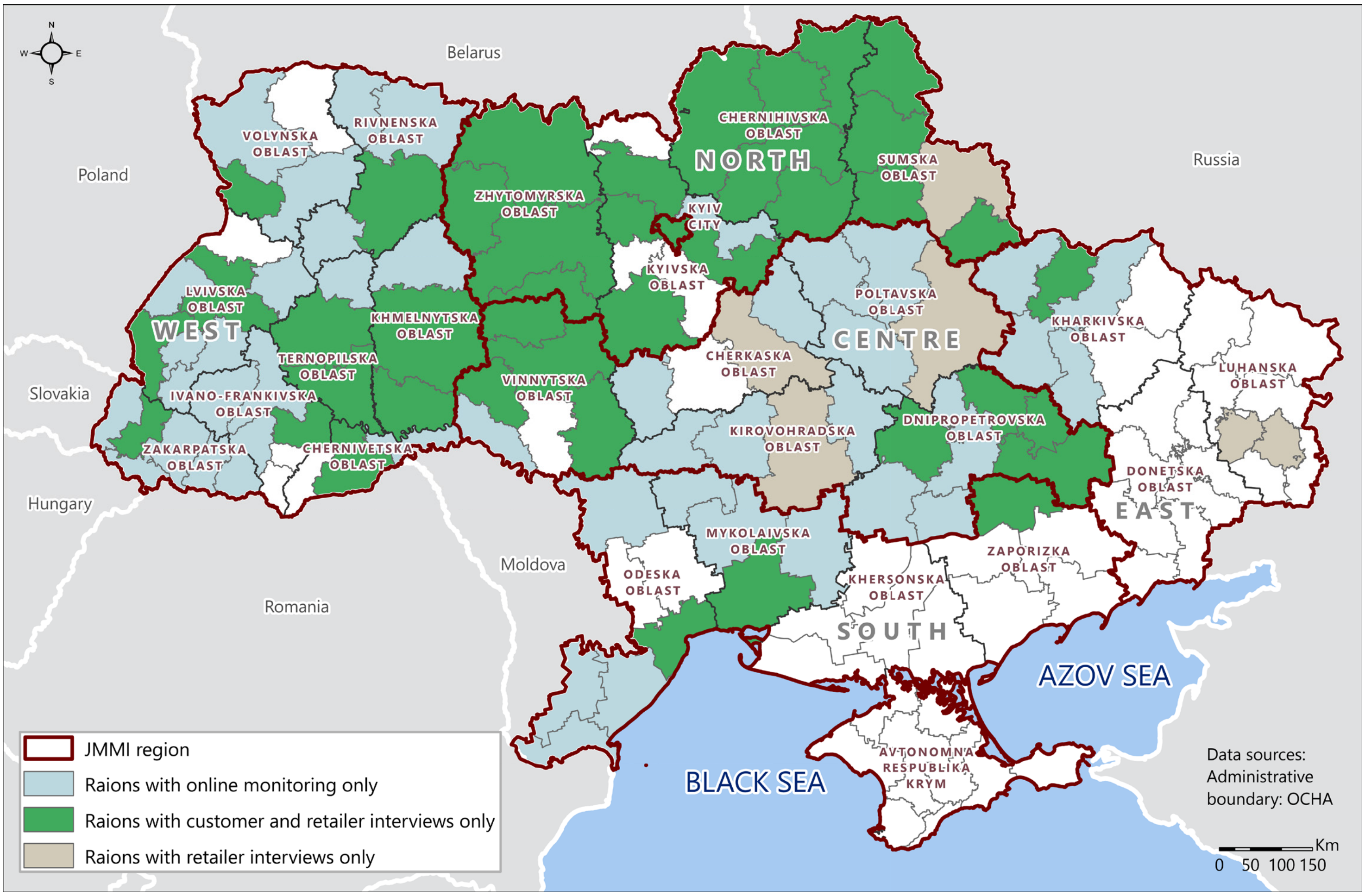
Exchange rates*

UAH/USD	UAH/EUR
35.50 ▲ +2.6%	37.40 ▲ +3.3%

12	**participating partners**
821	**interviews conducted**
447	*retailers surveyed*
374	*customers surveyed*
23	oblasts monitored
268	hromadas monitored

*Median exchange rate, parallel market. Data available at **http://minfin.com.ua**

Map 1: Coverage (in-person and online)



AVAILABILITY

In March, the **Government of Ukraine adopted Resolution 207**, suspending the exports of food products, including buckwheat, and limiting the export of poultry and eggs, among other items.

Across the country, the reported availability of food items, hygiene items, medication, and warm clothes rose again when compared to the two previous months. Overall, food availability is generally high nationwide - the region with lowest availability is the East, with 84% of customers reporting that food items are fully available.

Other items, despite being mostly available in the majority of regions, are reportedly much more difficult to find in the East region. Only 52% of customers report NFIs being fully available there, 32% report medication being fully available, and 24% report warm clothes being available in the East region.

Moreover, vehicle fuel has been reported to be fully available by only 9% of customers across the country. Kyiv is the region where vehicle fuel is most available, where still only 14% of customers report it being fully available. Heating fuel availability is reportedly a bit higher nationwide, with nearly half of the customers reporting it is fully available.

Looking at specific items, buckwheat is according to vendors interviewed the item with the most limited availability. From the 87 hromadas where vendors were interviewed face to face, 14 had vendors reporting buckwheat having limited availability.

Despite being one of the top producers of buckwheat worldwide, Ukraine has historically imported a significant amount of buckwheat from Russia.

Fig 1: % of customers reporting availability of vehicle fuel, national

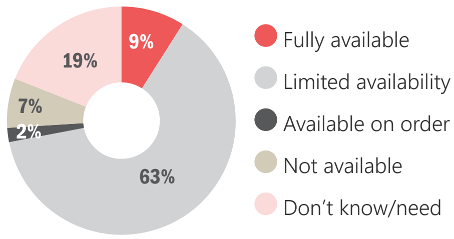


Fig 2: % of customers reporting availability of heating fuel, national

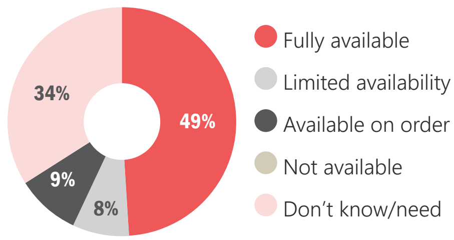


Fig 3: % of customers reporting availability of food items, national

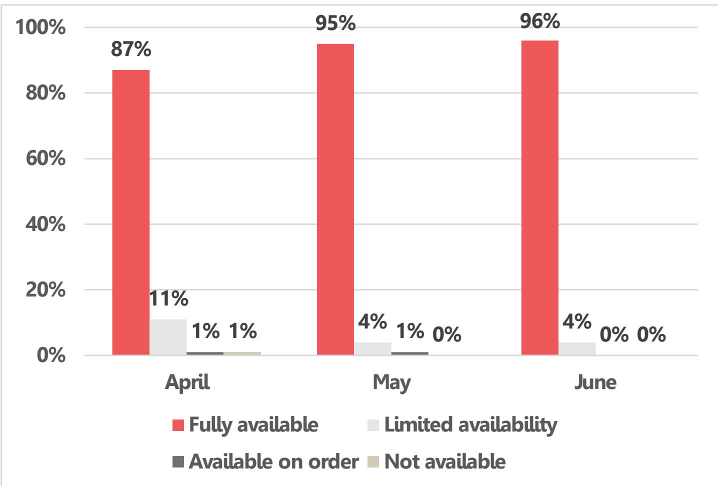


Fig 4: % of customers reporting availability of hygiene items, national

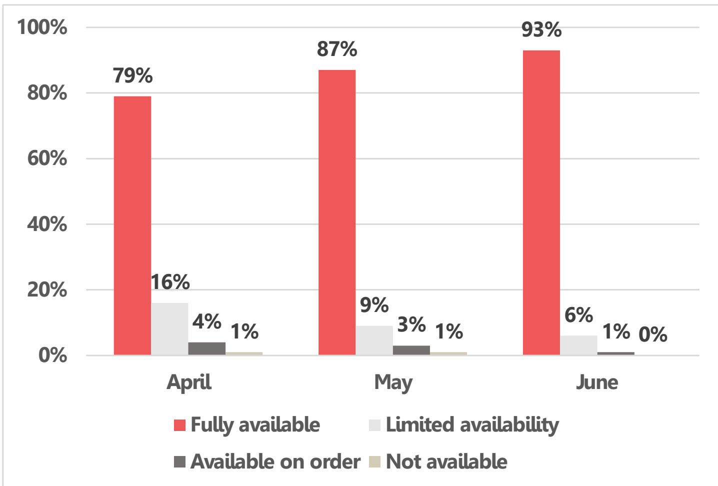


Fig 5: % of customers reporting availability of medication, national

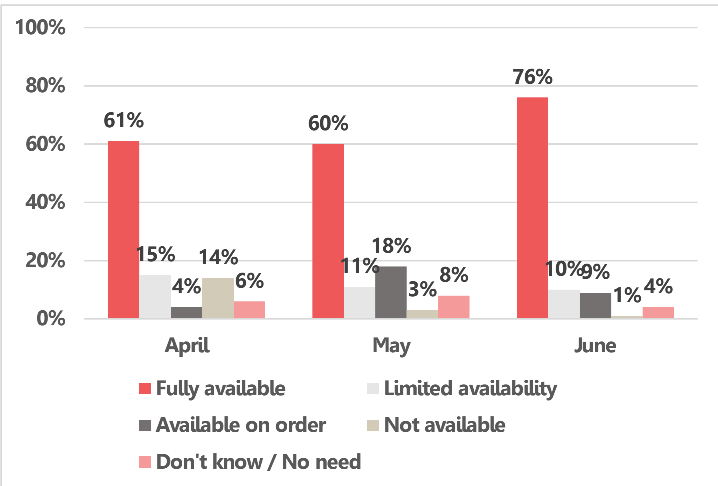
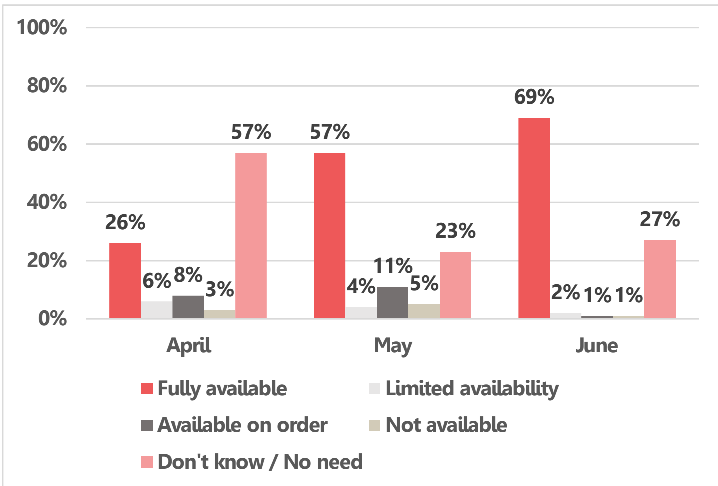


Fig 6: % of customers reporting availability of warm clothes, national



THE BASKET

The JMMI Basket is a subset of the 296-item Minimum Expenditure Basket (MEB) maintained by the State Statistics Service of Ukraine (SSSU), focusing on core food and hygiene items that an average household must purchase on a regular basis. The JMMI Basket was defined in consultation with the Ukraine Cash Working Group. Trends in the price of the basket are indicative of consumer price inflation.

In June, the regions with the highest increases in the JMMI basket price were the North (35% increase to 942 UAH, the second lowest price across all regions) and West (33% increase to 935 UAH, but still the lowest price across all regions). This is an indication that the price increases observed in the East and South regions in May have now reverberated across the country.

JMMI BASKET

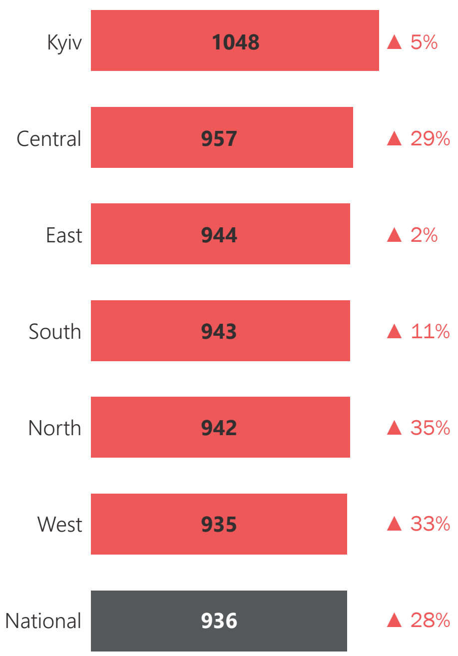
Food

Bread	500 g
Buckwheat	1 kg
Cabbage	1 kg
Carrots	1 kg
Chicken (legs)	1 kg
Complement. cereal for babies	200 g
Drinking water	1 bottle (1.5L)
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 (automatic)	1 box (400 g)

Fig 7: Median values of the full JMMI baskets by region, in Ukrainian Hryvnia (UAH)



Map 2: Median values of the JMMI baskets by oblast, in Ukrainian Hryvnia (UAH)

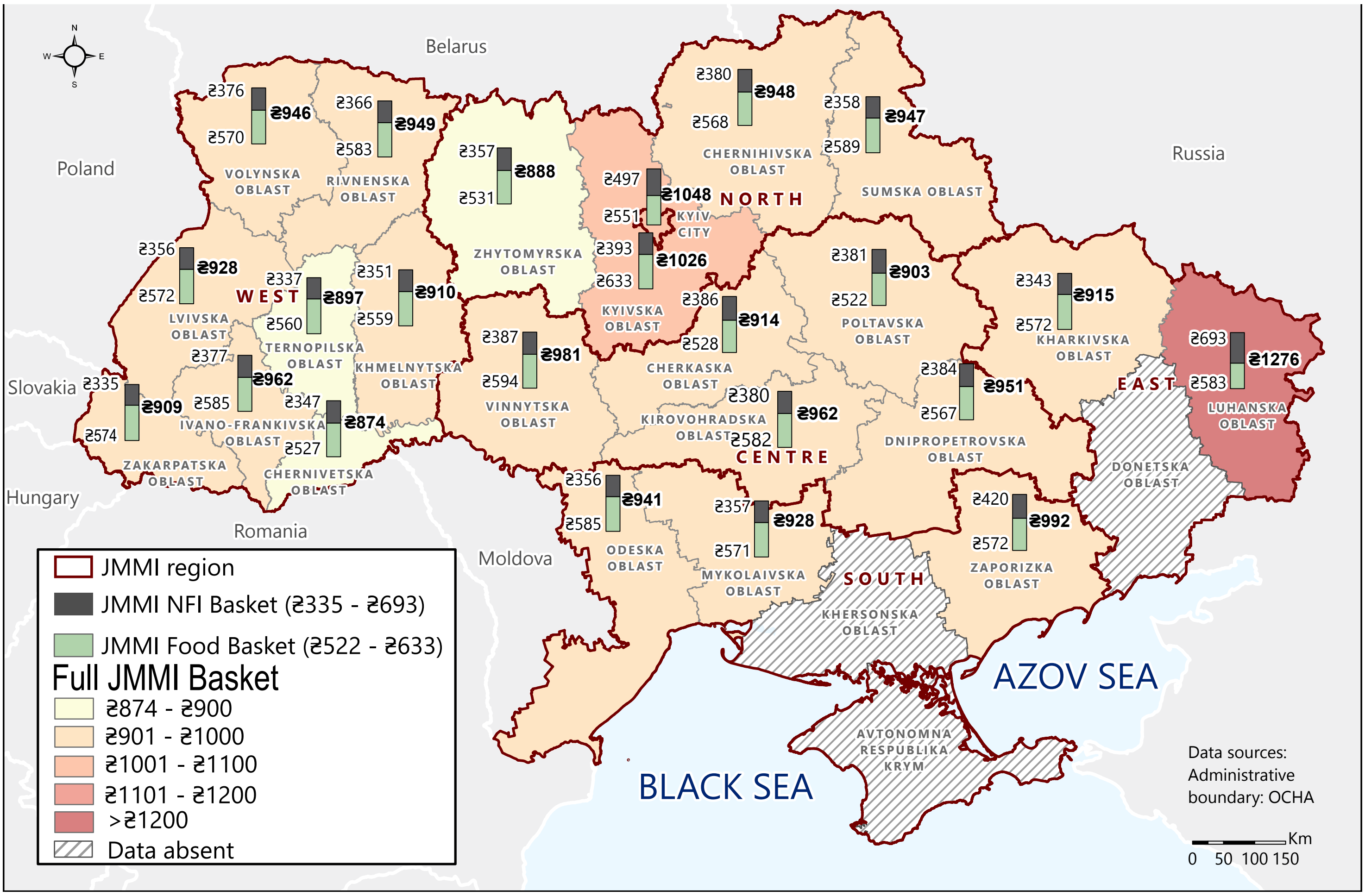


Table 1: Median prices of food items by region, UAH

		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	18	25%	16	12%	16	4%	17	16%	20	-2%	13	-1%	10	10%
Buckwheat	1 kg	88	32%	90	34%	90	11%	100	53%	80	10%	87	19%	91	29%
Cabbage	1 kg	27	3%	34	33%	34	15%	35	34%	30	20%	34	-5%	30	16%
Carrots	1 kg	25	12%	27	23%	26	4%	27	23%	26	13%	27	-10%	26	18%
Chicken (legs, fresh)	1 kg	103	38%	103	46%	102	51%	92	61%	72	6%	86	33%	102	46%
Complementary cereal	200 g	80	9%	77	-32%	83	-12%	80	N/A	90	-14%	77	26%	80	-14%
Eggs (chicken)	10 pcs	22	47%	20	34%	20	33%	22	47%	20	25%	22	18%	21	41%
Milk (2.5%, fresh)	900 mL	29	20%	30	26%	31	13%	30	31%	31	9%	28	12%	30	24%
Oil (sunflower, refined)	900 mL	60	16%	60	1%	60	0%	60	16%	60	4%	60	-8%	60	5%
Onions	1 kg	22	22%	24	33%	28	49%	24	33%	24	41%	30	48%	24	31%
Potatoes	1 kg	8	-5%	7	33%	7	-33%	9	51%	10	10%	10	-34%	8	-5%
Rice (round)	1 kg	59	41%	59	32%	58	25%	59	41%	57	20%	57	9%	59	41%
Water	1.5 L	12	-1%	11	7%	12	11%	12	22%	12	-1%	12	1%	12	3%
Wheat flour (white)	1 kg	18	0%	17	0%	20	-3%	20	15%	20	3%	17	-11%	18	2%

Table 2: Prices of non-food (hygiene) items by region, UAH

		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)	14	128%	8	23%	8	-7%	12	101%	11	-32%	8	-22%	11	57%
Diapers (infant, 5-9 kg)	1 pack (40-60 pcs)	240	70%	240	70%	240	5%	240	70%	349	2%	278	-5%	240	70%
Hygiene/sanitary pads	1 pack (10 pcs)	29	36%	53	132%	N/A	N/A	19	-18%	20	-26%	16	-50%	25	6%
Laundry soap	1 bar (200 g)	17	33%	16	22%	17	17%	18	31%	15	1%	16	2%	17	23%
Toothpaste	1 tube (75 ml)	31	22%	30	16%	30	20%	31	20%	58	21%	29	-17%	31	21%
Washing powder	1 box (400 g)	36	23%	37	24%	36	25%	36	21%	44	43%	36	11%	36	21%

Fig 8: Price of wheat in the international market, as % from January 2022

Source: Business Insider [**link here**]

*N/A in tables above stands for cases when the price change since the previous month is undefinable due to lack of sufficient data.

PRICES

The changes in the JMMI basket price mostly derive from changes of NFI items, even though they represent on average only 38% of the cost of the basket. Nationally, while food prices rose about 18%, NFI prices rose 33%.

The regions most affected by the increasing prices of NFIs were the West (52% on average) and the Center, followed by the North. Looking at food prices, the North saw the largest increase (34%), followed by the Central and the West regions.

Among the food items monitored by the JMMI, poultry and eggs suffered the highest increases of price (despite limitations to exports imposed by Resolution 207, **see page 2**), while the price of wheat seems to have stabilized.

As illustrated in Fig. 8, the price of wheat futures** has been falling since May in the international market, but is still above the pre-conflict levels. As of May, it was estimated that **nearly 25 million tonnes of wheat** are still stuck in Ukraine. Recent **negotiations aimed at resuming exports of Ukrainian grain** out of Black Sea ports and **ease of US sanctions on Russian grain and fertilizers** might have contributed to controlling speculation.

Nevertheless, **wheat prices had been rising since before the conflict onset**, and are unlikely to continue to decrease significantly.

** For an explanation of 'futures', please refer to the methodology page

Fig 9: % of retailers reporting difficulties keeping store operational and well-stocked, by region

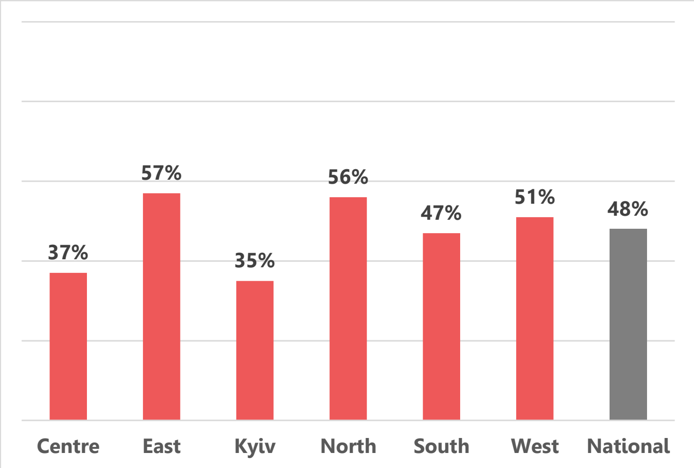


Fig 10: % of retailers reporting that they expect new challenges due to the crisis, by region

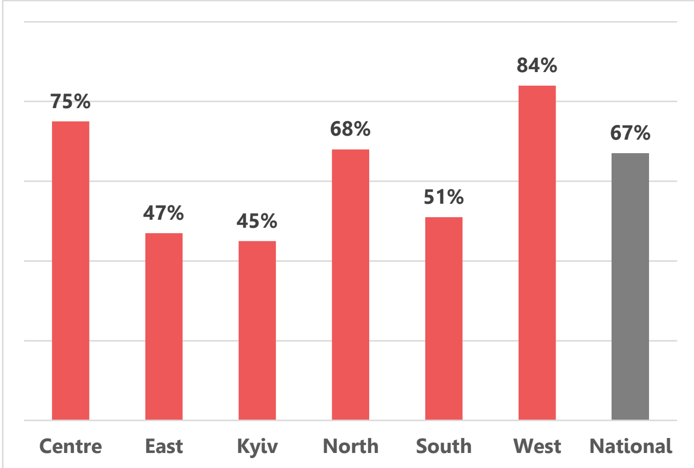


Fig 11: % of retailers reporting new challenges faced since the start of the crisis, by type of challenge and region

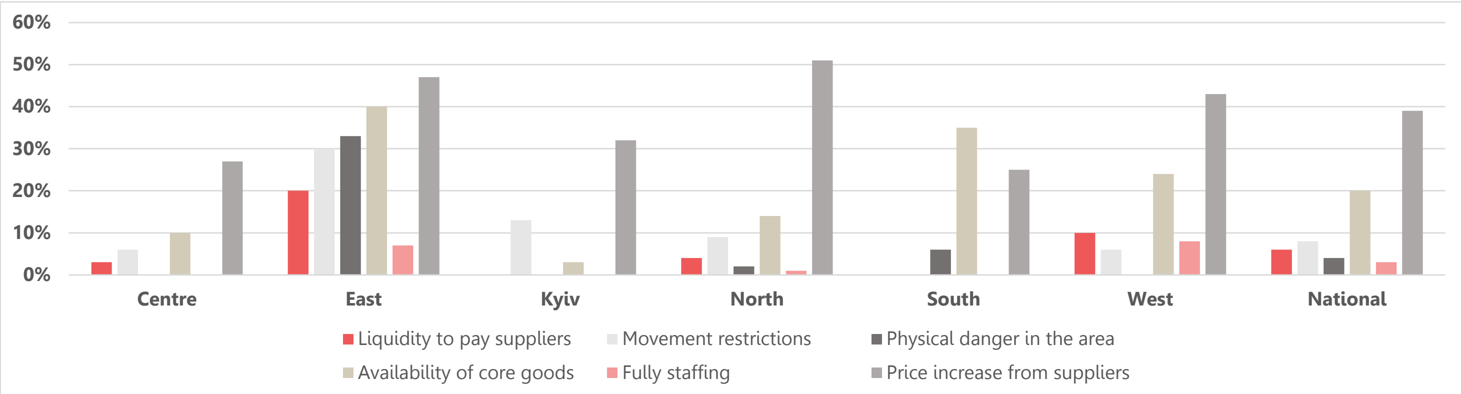


Fig 12: % of customers and retailers reporting that the crisis has affected the ability to access shops, by region

ACCESS AND FUNCTIONALITY

Compared to JMMI data from previous months, in June a lower percentage of vendors reported having difficulties to keep their stores operational and well-stocked, but a higher percentage reported to be expecting new challenges due to the crisis.

Among the main challenges reported by vendors, price increase from suppliers and availability of core goods seem to be more frequent than movement restrictions, physical danger, staffing, or liquidity.

The region most affected by new challenges has reportedly been the East, where 47% of vendors reported having issues with price increases from suppliers and 40% reported issues with availability of core goods. The East is also the region where customers reportedly have less access to shops.

Fig 13: % of retailers reporting that they mostly rely on a single supplier for food items, country-wide

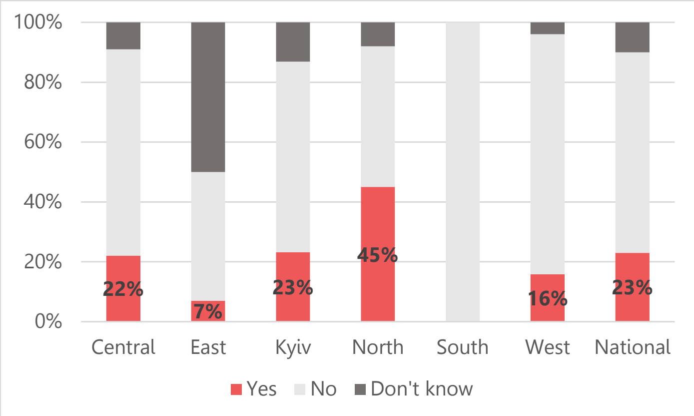
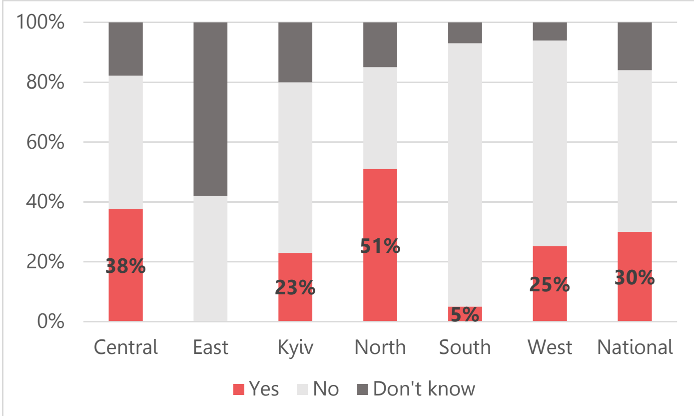


Fig 14: % of retailers reporting that they mostly rely on a single supplier for hygiene items, country-wide



SUPPLY

A growing percentage of vendors reported mostly relying on a single supplier was observed across regions for both food and hygiene items. In May, the percentage of vendors reporting the same on a national level was 4% and 6% for food and hygiene items, respectively.

Understanding supply chains can be complex so any data on suppliers should be taken as indications for be further triangulated.

FINANCIAL SERVICES

In general, banks, ATMs, and Ukrposhta services reportedly remained available across the country similar to the previous month.

Bank branches were reported to be fully available by only 53% and 67% of respondents in the South and East regions, respectively. In Kyiv and the West, the percentage is higher, around 98% and 79%. In May, the national average was 69%.

The region with fewer respondents reporting ATM services being fully available was the North, with about 68% of respondents. In other regions, the percentage ranged between 78% (South) and 98% (Kyiv). In May, the national average was 76%.

Looking at the Ukrposhta services, the only region severely affected was the East, where only 38% of respondents reported offices functioning as usual. In other regions, the percentage ranged between 72% (North) and 99% (Kyiv). In May, the national average was 81%.

FUEL

Vehicle fuel was reported to be fully available by only 9% of customers across the country (see **page 2**). The prices continued to increase, especially after the **government of Ukraine lifted restrictions on fuel prices** by mid-May. The result was already observed in May, where petrol A-95 increased by 23% when compared to April, and then in June the price increased again by 21% when compared to May. Other vehicle fuel prices followed a similar pattern, with the exception of liquefied petroleum gas (LPG).

Fig 15: Month-on-month change on the price of vehicle fuel, UAH

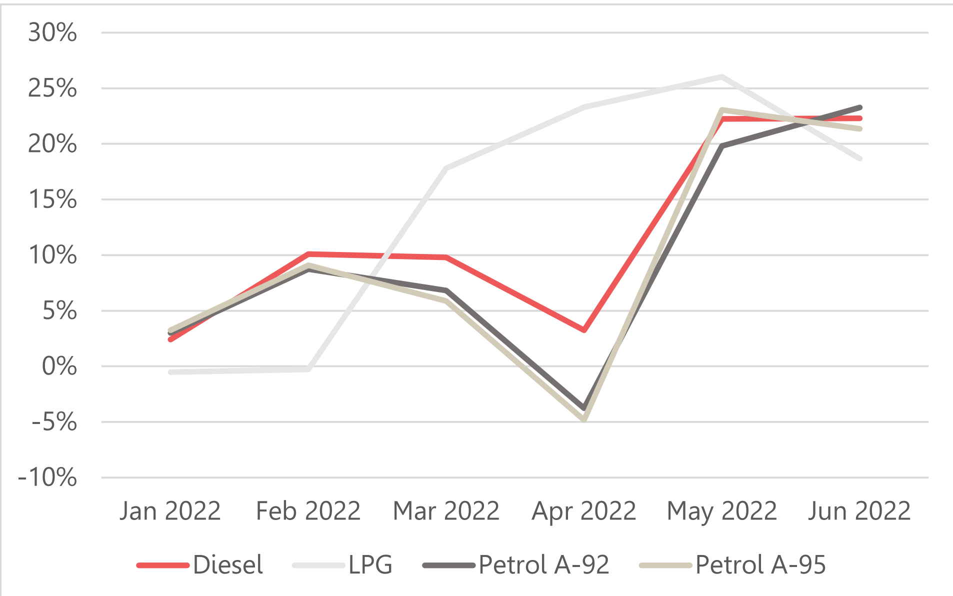
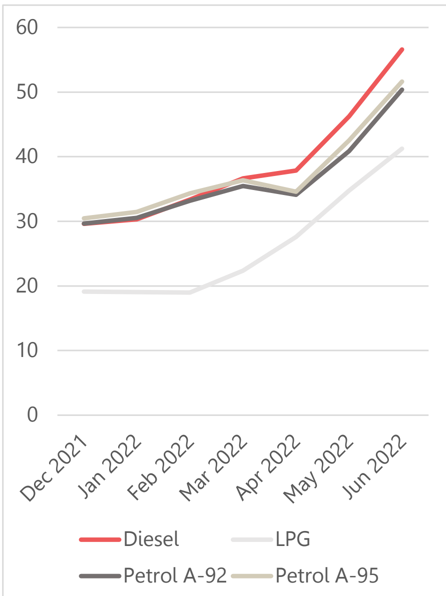


Fig 16: Price of vehicle fuel, UAH



MACROECONOMICS

While the official exchange rate from the National Bank of Ukraine (NBU) remained the same, the exchange rate for cash operations in banks and other operators seems to have stabilized after its major spike in late May.

The balance of trade in May was negative, after a briefly positive March and April. Reported inflation continued to rise, particularly for food items which were nearly 30% more expensive than 12 months prior, in June 2021.

RENT

Across the country, rent prices for a 1-room apartment have reportedly increased by 16% when compared to January. In 2021, the increase in the same period was of 3%. The major increases in rent were observed in the Chernivetska (58%), Kirovohradska (53%), and Ivano-Frankivska (45%).

MEDICINE

The price of basic medicine items, such as antibiotics, analgesics, and vasodilating agents, continued to increase. The price of antipyretics and analgesics of domestic brands in June was 25% higher than January 2022.

Fig 17: Mid-market exchange rate for the US Dollar (USD)

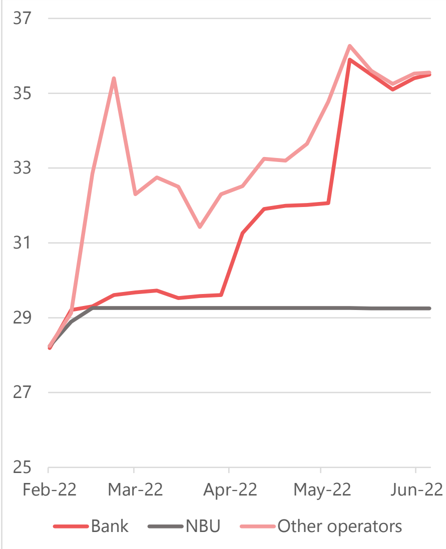


Fig 18: Inflation rates, month-on-month

Fig 19: Changes in gross value of exports and imports of Ukraine, million USD

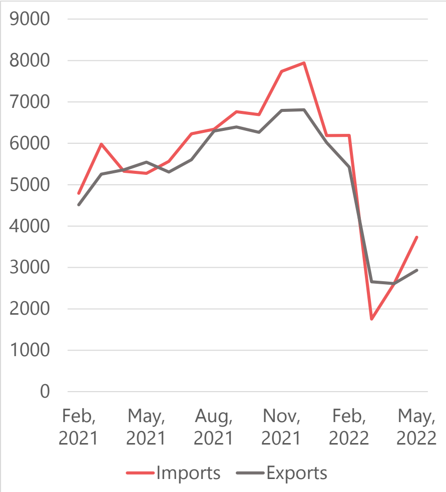


Fig 20: Cumulative price increase of selected medicines, national averages, as % from January 2022

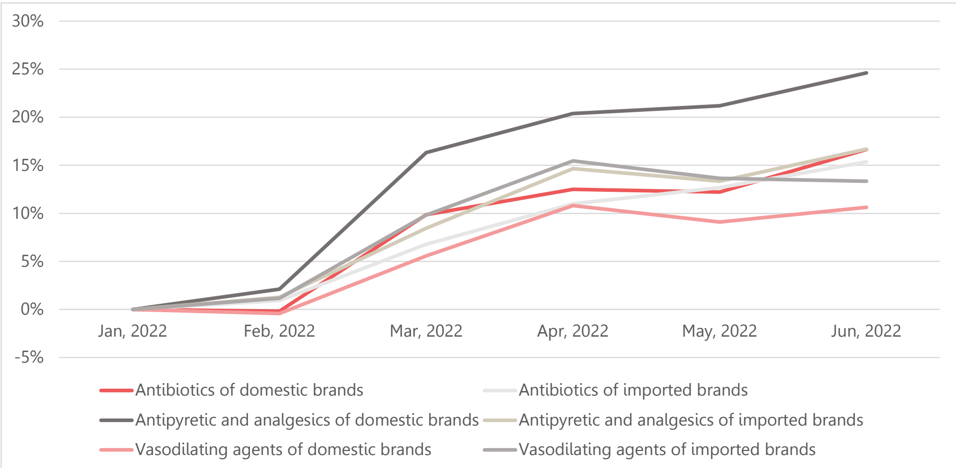
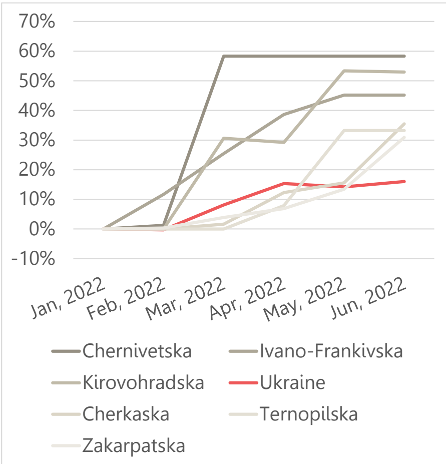


Fig 21: Top oblasts by increase of rent for a 1-room apartment, as % from January 2022



BACKGROUND

Since 24 February 2022, the escalation of military clashes across Ukraine has prompted mass displacement and humanitarian crisis. Given the prominence of multi-purpose cash as a modality for assistance, market monitoring is key to ensure humanitarian intervention is effective, sustainable and does not harm local economic systems. Due to the conflict's sudden expansion to areas of Ukraine that were previously untouched, humanitarian market data from conflict-affected areas is limited and incomplete. 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.

METHODOLOGY

The JMMI is conducted in partnership with the Ukraine Cash Working Group (CWG) through its Task Team 4 on Monitoring, co-led by ACTED and REACH. 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 centres on quantitative, structured interviews with purposively sampled interviewees. Two harmonised 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. Partners focus on interviewing retailers, rather than wholesalers or distributors, as these are the market actors who have the greatest interaction with vulnerable populations.

Primary data is collected and analysed on a hromada level, with partners submitting data from each hromada's largest marketplaces devoted to retail, as well as from larger standalone chain stores. Field teams must aim to collect a minimum of 3 prices per item per assessed hromada, interviewing retailers until this threshold is met, and must also submit a minimum of 5 customer interviews per assessed hromada. In line with the purpose of the Minimum Expenditure Basket, 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 in the common JMMI methodology and tools; it is then submitted to a common CWG KoBo server and is cleaned and analysed by REACH on behalf of the CWG.

The JMMI also integrates secondary data via a remote price monitoring component. REACH collects data on the prices and availability of all JMMI items from ATB, one of Ukraine's largest supermarket chains. The accuracy of this remote monitoring methodology is verified via in-person spot checks of monitored ATB stores. Secondary data from other sources, particularly the State Statistics Service of Ukraine, is also integrated into the JMMI and used for triangulation where possible.

The prices reported in this factsheet are 'location medians', designed to minimise 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).

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 or customer 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.

Due to the remote monitoring methodology's reliance on ATB's online services, remote data is available only from areas where ATB continues to offer these services. These areas generally do not include non-government-controlled areas (NGCAs) or areas that remain heavily affected by the conflict.

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 changes.

CONCEPTS

Futures are a type of financial product where you commit to buy a commodity for a fixed price on a fixed date in the future. If wheat futures are falling, it suggests that traders are becoming less confident that the price of wheat will continue to rise in the near future. In that case, the market has relatively high confidence that prices will decrease in the near future.

PARTNERS

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 Programme (UNITAR-UNOSAT). For more information about REACH, please visit **http://reach-initiative.org.**