



Joint Market Monitoring Initiative (JMMI) October 2025

REACH Ukraine

REACH Informing
more effective
humanitarian action

IMPACT Shaping practices
Influencing policies
Impacting lives
REACH PANDA AGORA



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01

Methodology

Methodology

Providing data on price trends and market functionality indicators

Data collection is a joint, partner-led exercise

Monthly basis

Quantitative, structured interviews: retailer and customer key informant (KI) interviews

Per assessed hromada:

- 3 prices per item
- 5 customer KI interviews



Limitations:

The results should be considered as indicative.

Only the price of the least expensive commonly purchased brand or variety is recorded for each JMMI item.

Some changes in the overall median prices may be driven by shifts in coverage rather than by true price.

JMMI in October 2025



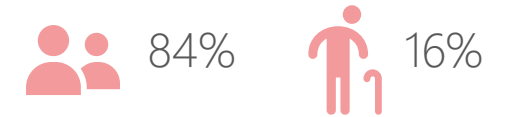
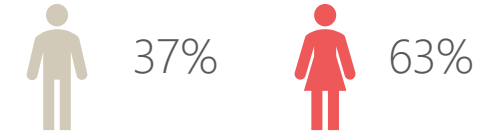
9 Participating partners

15 Assessed oblasts

44 Assessed hromadas

375 Key informant interviews (KIIs)

218 customers surveyed



157 retailers surveyed

20 Commodities assessed

Partners



acted



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02

Key findings

Key findings



After a prolonged period of noticeable fluctuations in the first half of 2025, **the value of the basket stabilized during July–October, largely due to the stabilization of vegetable prices.** In October, the value of the JMMI basket amounted to 1,186 UAH, which is 3% lower than in September and almost the same as the level recorded in August.



In October, annual consumer inflation showed a noticeable decline amounting to 10.9%, which is the lowest figure recorded in 2025. At the same time, the annual inflation rate for the food and non-alcoholic beverages group decreased to 15.6%, which is 1.8% lower than in September.



Local markets continue to operate efficiently, fully meeting the needs of the population in assessed areas. However, **the impact of power outages has increased noticeably,** with 13% of Retailer KIs reporting that the lack of electricity affects access to shops. This was most frequently reported in the North (44%) and in the Kyiv city (23%)



Most often among the areas surveyed, Customer KIs reported issues with the availability of essential items in the Zaporizka, and Chernihivska Oblasts. **The Stepnenska hromada in Zaporizka Oblast appears to be the most vulnerable, with limited availability of medications, warm clothes and vehicle fuel.**

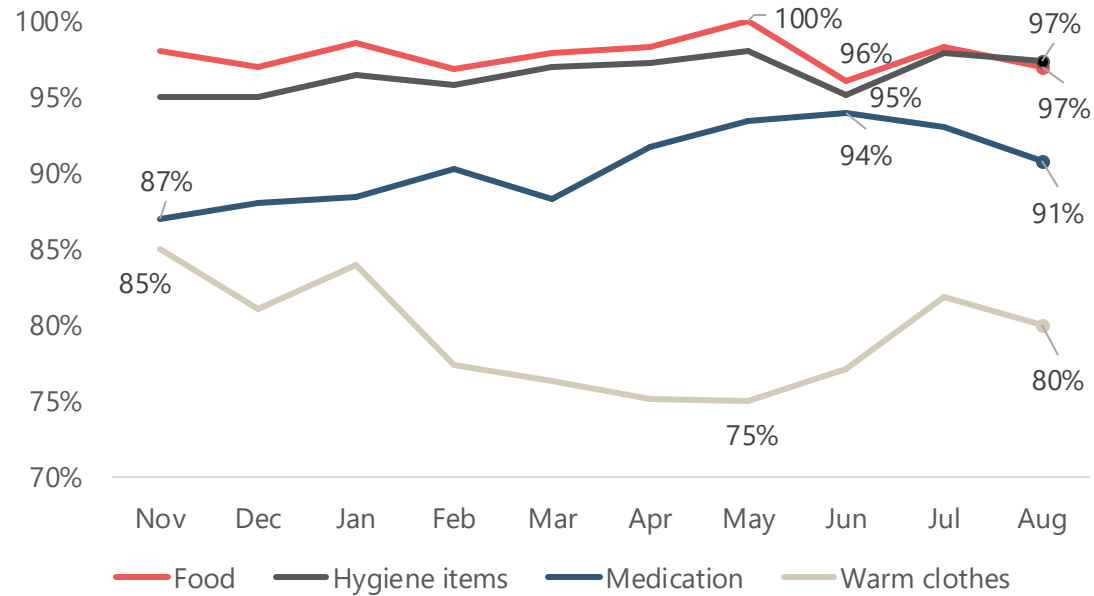
A world map is shown in a light gray, semi-transparent style, overlaid on a background of a light gray geometric pattern of interconnected lines forming various polygons. The map is centered on the Atlantic Ocean. In the center of the map, the number '03' is displayed in a bold, red, sans-serif font.

03

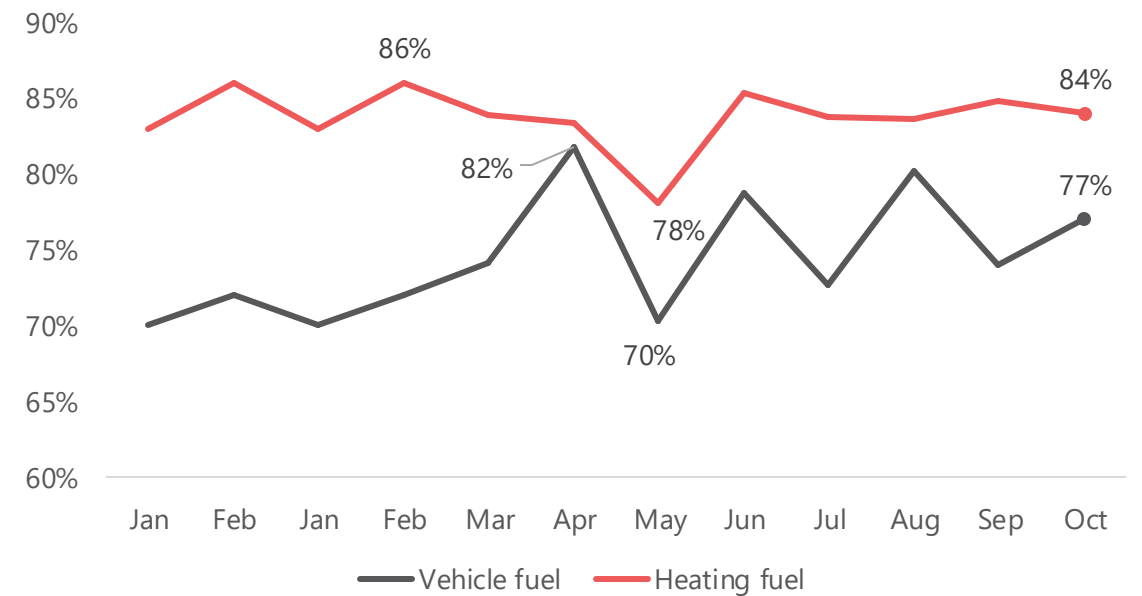
Market and inflation overview

Availability of goods and fuel

% of customer KIs reporting full availability of essential items, overall



% of customer KIs reporting full availability of fuels, overall



Hromadas in which customer KIs in October reported the greatest level of availability issues:

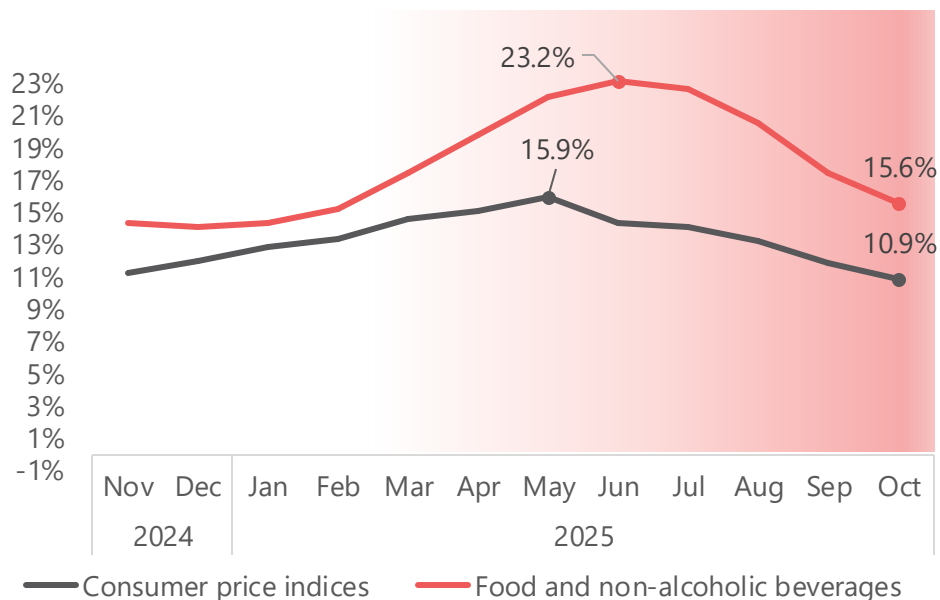
Medication
Stepnenska (Zaporizka)

Warm clothes
Stepnenska (Zaporizka)
Shyrovivska (Zaporizka)
Semenivska (Chernihivska)

Vehicle fuel
Stepnenska (Zaporizka)
Shyrovivska (Zaporizka)

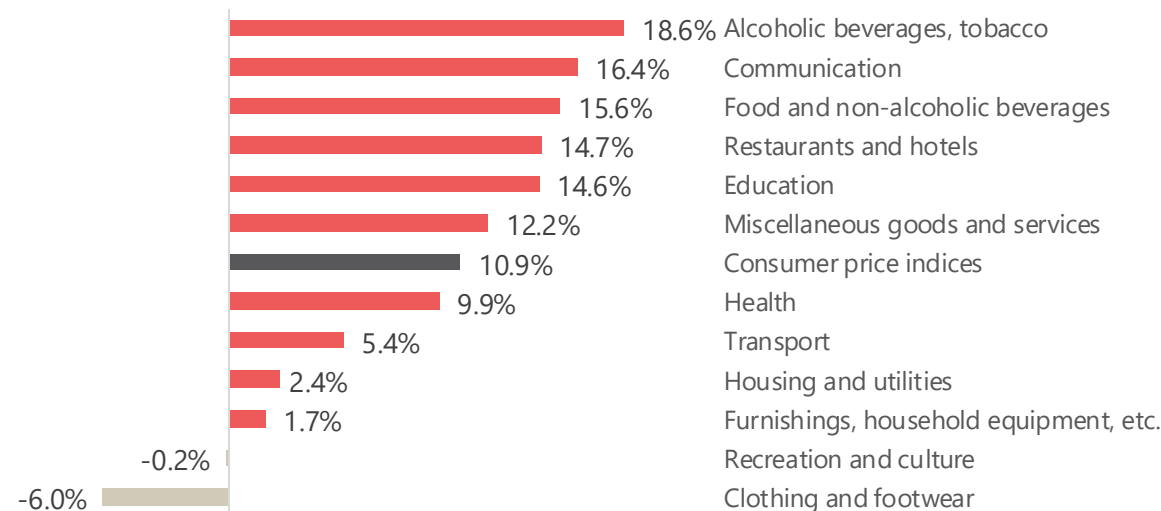
Prices to change

Annual inflation rate*, %



Source: SSSU

Consumer price changes (%) for groups of goods and services, from October 2024 to October 2025



Source: SSSU

Eggs, edible oil and meat increased the most annually (by 41.9%, 26% and 25.2% respectively).

In October 2025, inflation continued to slow to 10.9% yoy. Due to a more moderate slowdown in raw food price increases, **the actual inflation trajectory was running slightly above the NBU's forecast trajectory.****

Going into the end of the year, inflation is expected to slow further due to sufficient food supply and the NBU's monetary policy measures to maintain interest in hryvnia assets and the sustainability of the foreign-exchange market.**

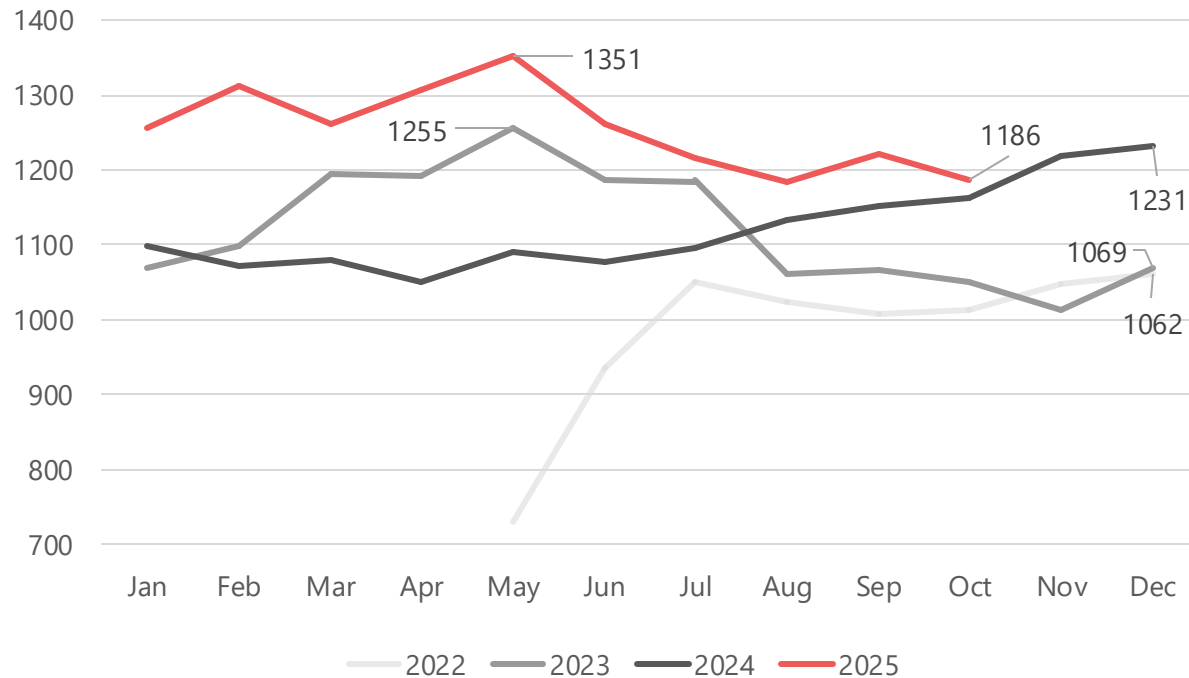
Monthly inflation* showed a moderate increase. Accordingly, in October 2025, the consumer price index rose by 0.9% compared to the previous month, while prices in the food and non-alcoholic beverages group increased more noticeably, rising by 1.6% in October.

* Annual inflation is the change of the price level between the current month and the same month of the previous year, monthly inflation is the change of the price level between the current month and the previous month.

** National Bank of Ukraine, [NBU October 2025 Inflation Update](#).

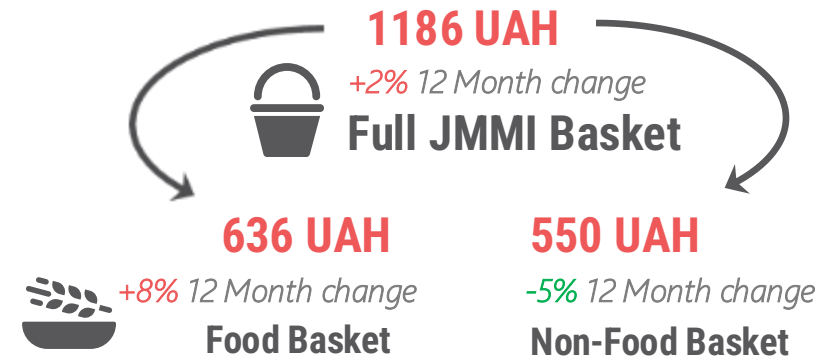
Prices for items in the JMMI basket

Monthly evolution of the JMMI basket price (in UAH), overall



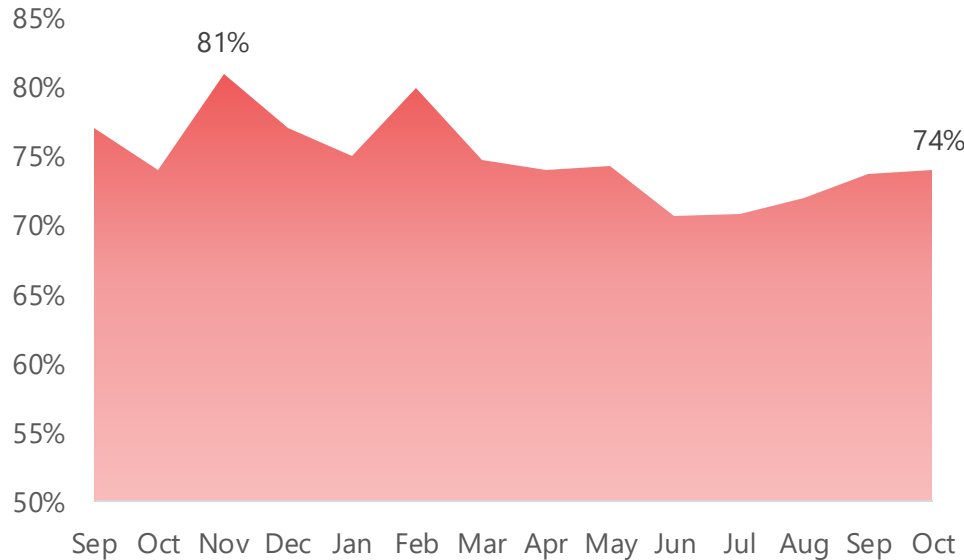
In October 2025, the highest cost of the full JMMI basket was observed in the South (1317)

JMMI basket in October



Affordability

% of customer KIs reporting that financial factors affected their access to goods in stores or marketplaces, overall



84% of customer KIs aged 60 and above reported that financial factors affected their access to goods in stores or marketplaces in October.

% of customer KIs reporting that financial factors* affected their access to goods in stores or marketplaces in October, by type of barrier, age group, gender, and type of area

Reported financial barrier	18-59 years old	60 years and above	Women	Men	Rural	Urban
Item price have increased	56%	84%	66%	57%	81%	57%
Fuel for vehicle is too expensive	24%	19%	18%	30%	26%	21%
Public transportation is too expensive	4%	3%	10%	5%	2%	5%
Cannot afford the items (despite prices have not risen)	13%	38%	19%	15%	19%	17%
Items are not available	1%	3%	2%	-	2%	1%
Do not have enough physical cash	1%	-	-	1%	2%	-

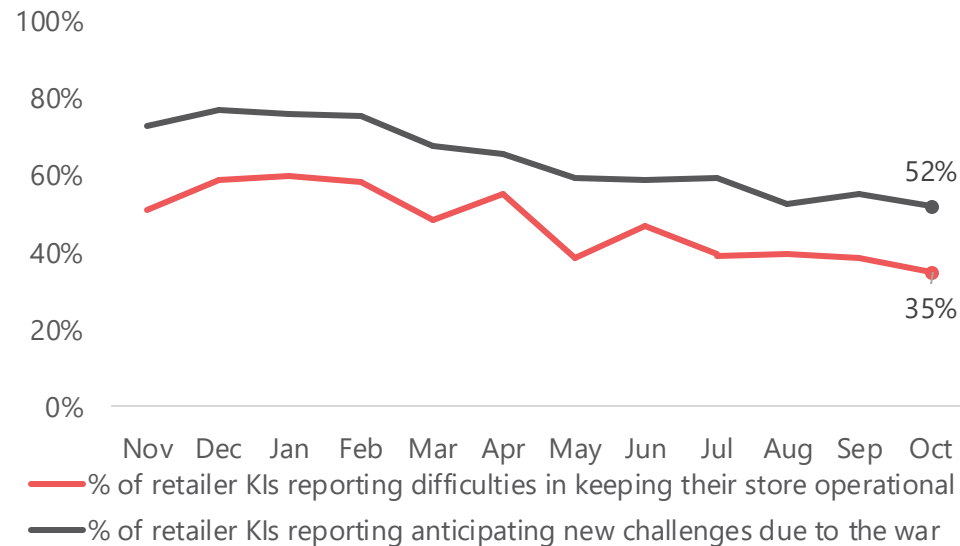


Price increase was reported as the main financial barrier to accessing goods by 96% of customer KIs in the South and 89% in the Center.

* Respondents could select more than one option.

Market functionality

% of retailer KIs reporting difficulties in keeping their stores operational and anticipating new challenges in the coming months due to the war



Top 4 difficulties* faced by retailer KIs in keeping their store operational and well-stocked due to the war in September

- 1 **15%** Fully staffing the store
- 2 **11%** Prices charged by suppliers
- 3 **11%** Absence of electricity
- 4 **11%** Movement restrictions

The highest value of the indicator was in the North (28%) and Kyiv city (23%)

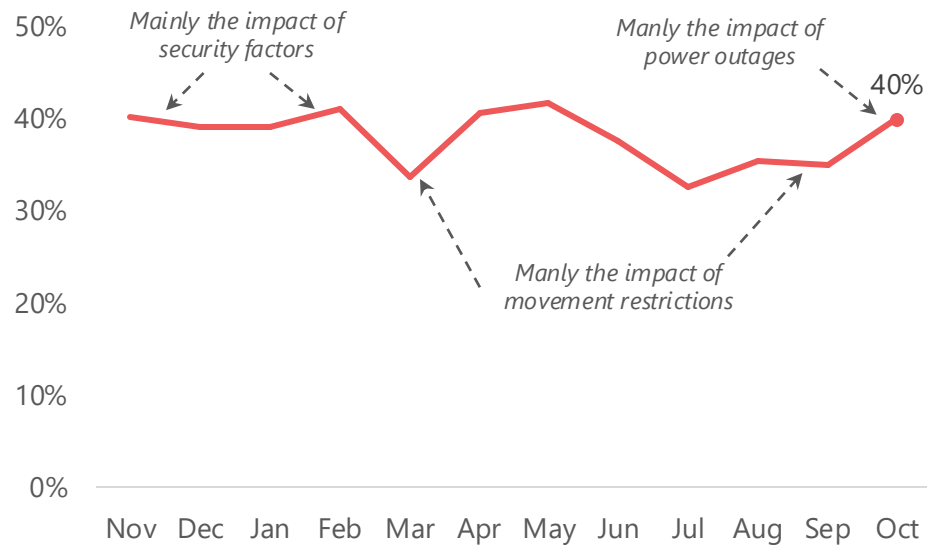
Top 2 challenges* retailer KIs expected to face in the coming months due to the war in September

- 1 **45%** Rising prices
- 2 **14%** Reduced purchasing power of customers

* Respondents could select more than one option.

Accessibility of stores and markets

% of customer KIs reporting that full-scale war has affected their ability to access stores



Main physical barriers* to accessing stores or marketplaces reported by customer KIs in September



Fighting or active shelling
100% Donetsk
90% Khersonska
20% Dnipropetrovska



Feeling unsafe due to fear of being targeted
100% Donetsk
80% Khersonska
40% Kyivska
25% Chernihivska



Movement restrictions
80% Khersonska
45% Kharkivska
40% Dnipropetrovska
40% Donetsk



Buildings or infrastructure have been damaged
40% Donetsk
20% Dnipropetrovska



Damage or blockages on roads
40% Donetsk



Lack of transportation
40% Donetsk



Power outages
80% Donetsk
20% Zaporizka

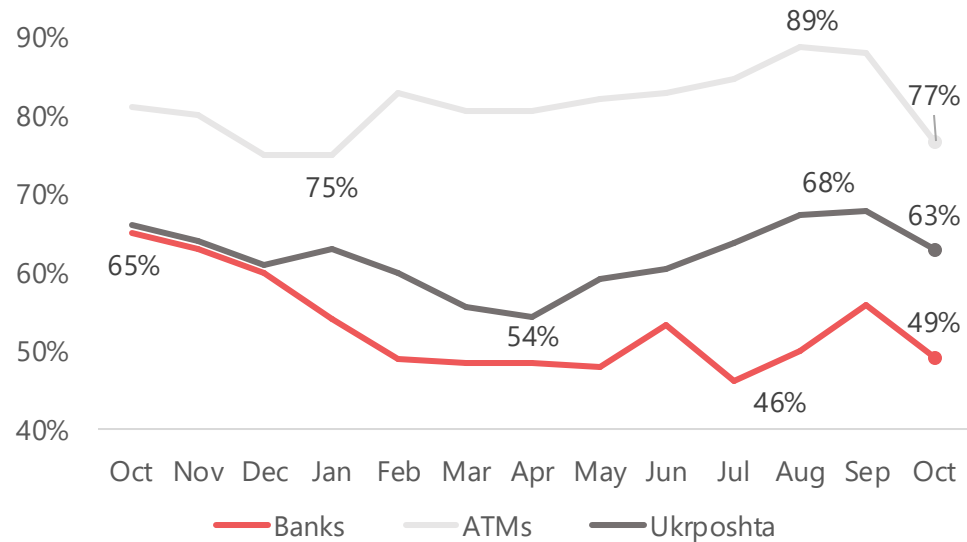


Air alerts
80% Donetsk
40% Khersonska
35% Kyiv city

* Respondents could select more than one option.

Accessibility of financial services

% of customer KIs reported full availability of financial services, overall



Air alerts restricted the opening hours of bank branches (reported by 35% of customer KIs) and Ukrposhta offices (21%) across the country.

Main barriers* to accessing financial services, reported by customer KIs in October:

Bank branches

Power outages
60% Donetska

Air alerts
100% Donetska
100% Vinnytska
75% Kharkivska
57% Chernihivska

Accessible only nearby
100% Mykolaivska
90% Khersonska
20% Lvivska
20% Kyivska

ATMs

No ATM
90% Khersonska
67% Zaporizka
50% Mykolaivska

Power outages
80% Donetska
14% Chernihivska

Lack of cash in ATMs
11% Chernihivska

Ukrposhta offices

Only mobile post offices
100% Mykolaivska
20% Lvivska

Air alerts
100% Vinnytska
60% Kyivska
31% Kyiv city
27% Chernihivska

Power outages
8% Kyiv city

* Respondents could select more than one option.

Thank you for your attention



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