



Joint Market Monitoring Initiative (JMMI) August 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 August 2025



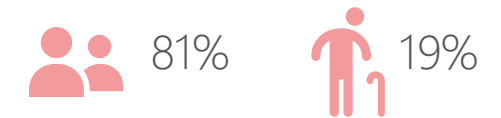
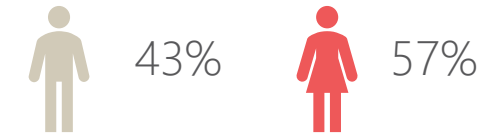
9 Participating partners

15 Assessed oblasts

46 Assessed hromadas

401 Key informant interviews (KIIs)

229 customers surveyed



172 retailers surveyed

20 Commodities assessed

Partners



acted



КАПІТАС
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02

Key findings

Key findings



The value of the JMMI basket has been decreasing for the third consecutive month, reaching 1,183 UAH in August, which is 12% lower than this year's peak recorded in May.



The decrease in the value of the JMMI basket was driven by the NFI component. The value of the food component of the JMMI basket in August remained almost unchanged compared to July, while the NFI component decreased by 6%.



The availability of banks, ATMs, and Ukrposhta in the assessed hromadas improved by 4% in August compared to July, with 50%, 67%, and 89% of customer KIs, respectively, reporting full availability.



In August, local markets continued to function reliably, effectively meeting the basic needs of the population throughout the country. The share of retailer KIs reporting difficulties in keeping their store operational continued to decline, reaching the lowest level of the year (52%). The share of retailer KIs anticipating new challenges due to the war stood at 40%, which is also very close to the minimum levels recorded this year.



The annual inflation rate has also been stabilizing for the third consecutive month. In August, the annual consumer inflation reached 13.2%, which is 0.9% lower than the result recorded in July. The annual price increase for the food and non-alcoholic beverages group was 20.5%, which is 2.1% lower than in July. **The expansion of the supply of new harvest agricultural products likely had a significant impact on inflation.**

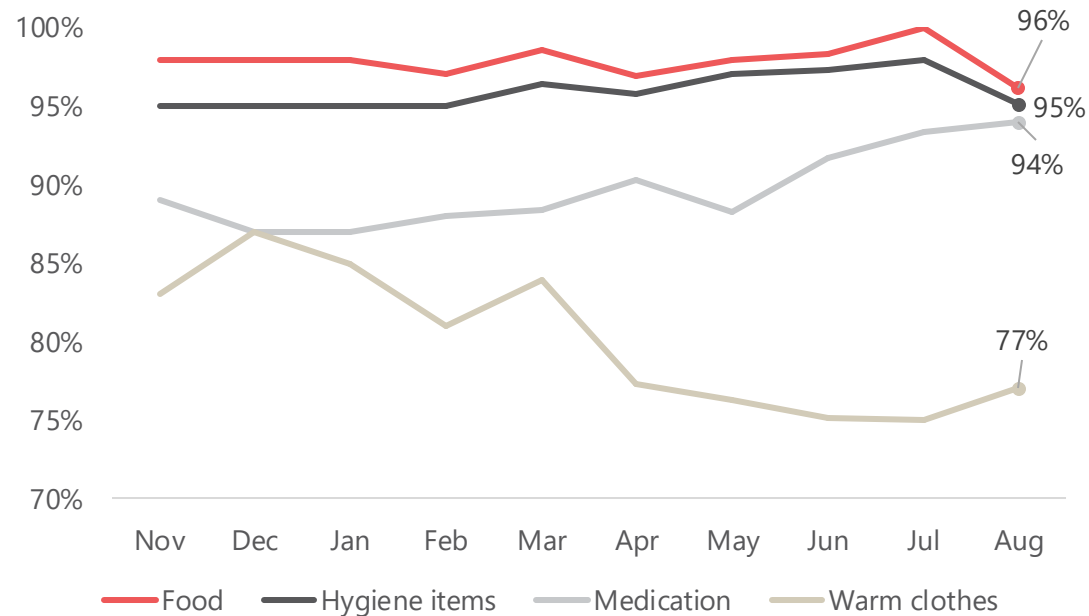
A world map is shown in a light gray, semi-transparent style, overlaid on a background of a light gray geometric pattern of interconnected lines forming various polygons. The map is centered on the Atlantic Ocean. In the center of the map, the number '03' is displayed in a bold, red, sans-serif font.

03

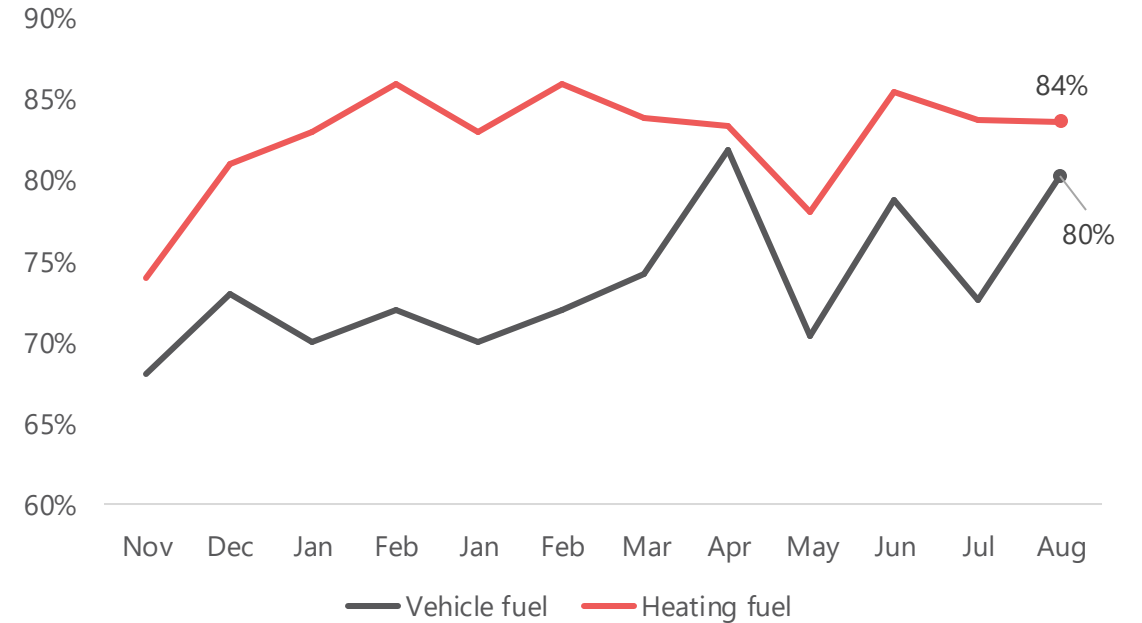
Market and inflation overview

Availability of goods and fuel

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



% of customer KIs reporting full availability of fuels, overall



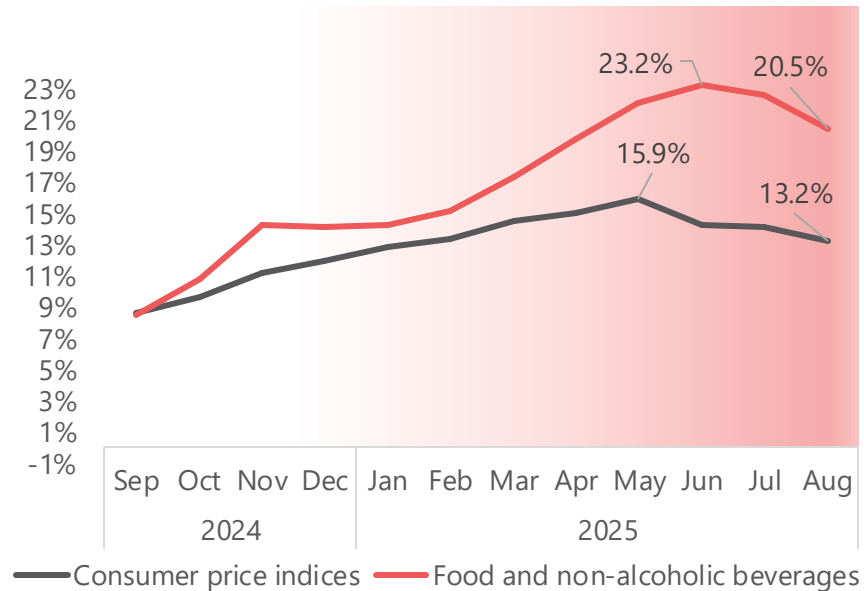
Hromadas in which customer KIs in August reported the greatest level of availability issues of:

Food
Vysokopilska (Khersonska)
Heating fuel
Kramatorska (Donetska)

Warm clothes
Vysokopilska (Khersonska)
Semenivska (Chernihivska)
Sakhnovshchynska (Kharkivska)
Pervomaiska (Kharkivska)
Lozivska (Kharkivska)

Prices to change

Annual inflation rate*, %



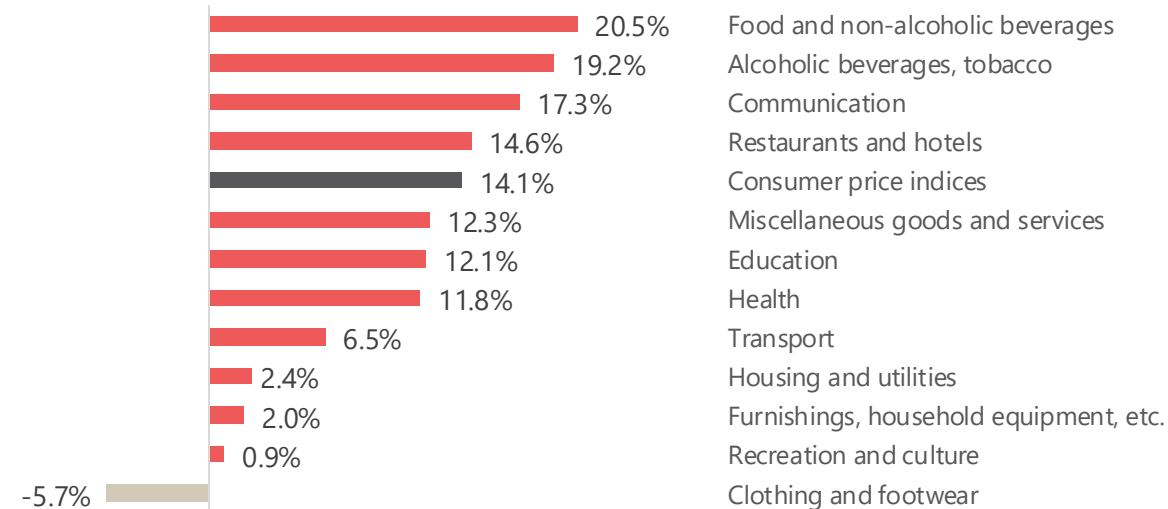
Source: SSSU

Eggs, fruit and edible oil increased the most annually (by 74.3%, 47.5% and 28.7% respectively).

*In July, both headline and core inflation continued to slow (to 14.1% yoy and 11.7% yoy). According to NBU preliminary estimates, these trends continued in August. ***

The expansion of the supply of new harvest agricultural products had a significant impact on inflation. As a result, inflation for both raw and processed food products declined. The dynamics of other components of core inflation (services and non-food goods) also declined, but the impact of fundamental factors remains fairly persistent. **

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



Source: SSSU

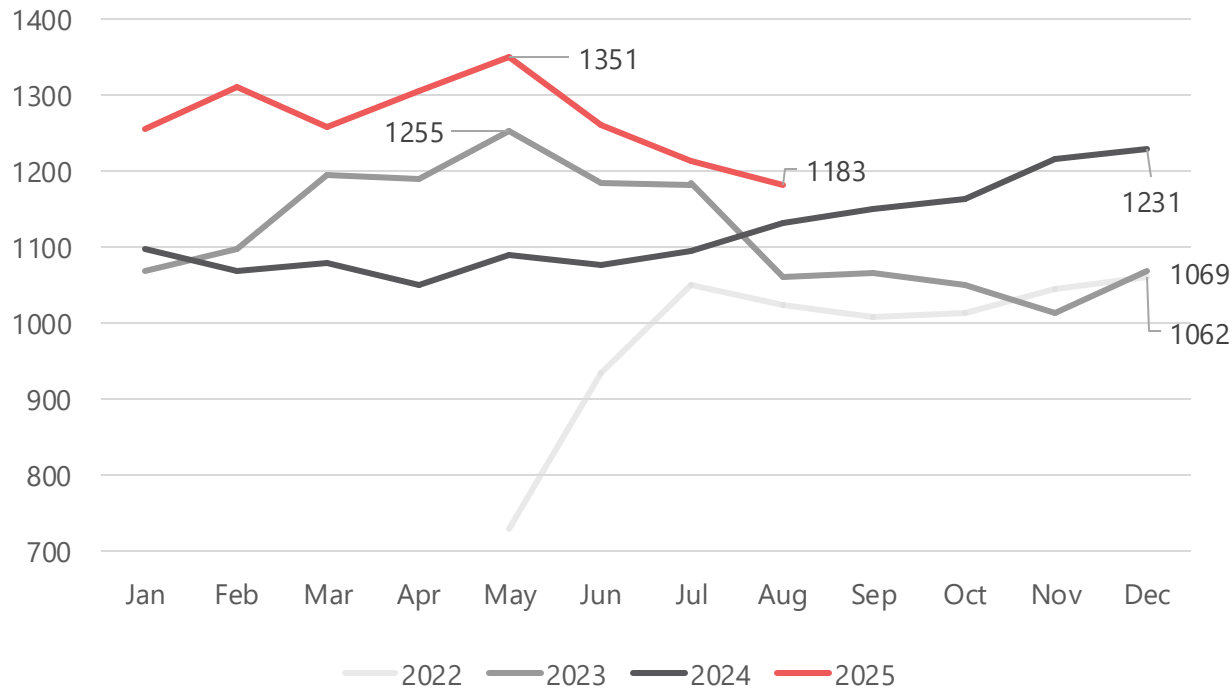
Monthly inflation* continued to show negative results. Accordingly, in August 2025, the consumer price index fell by 0.2% compared to the previous month, and prices in the food and non-alcoholic beverages group fell by 0.8% respectively.

* 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, [Macroeconomic and Monetary Review, September 2025](#).

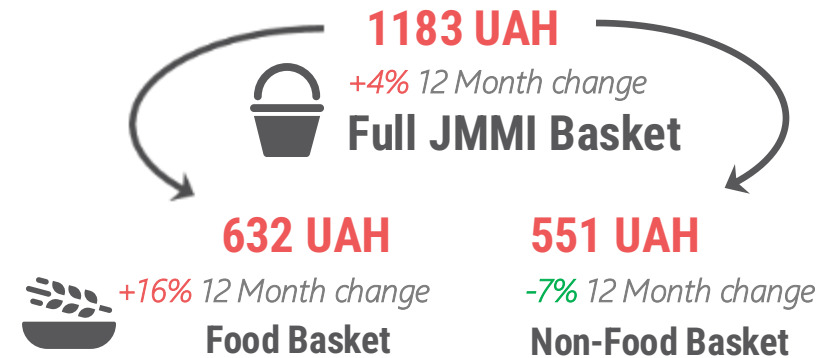
Prices for items in the JMMI basket

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



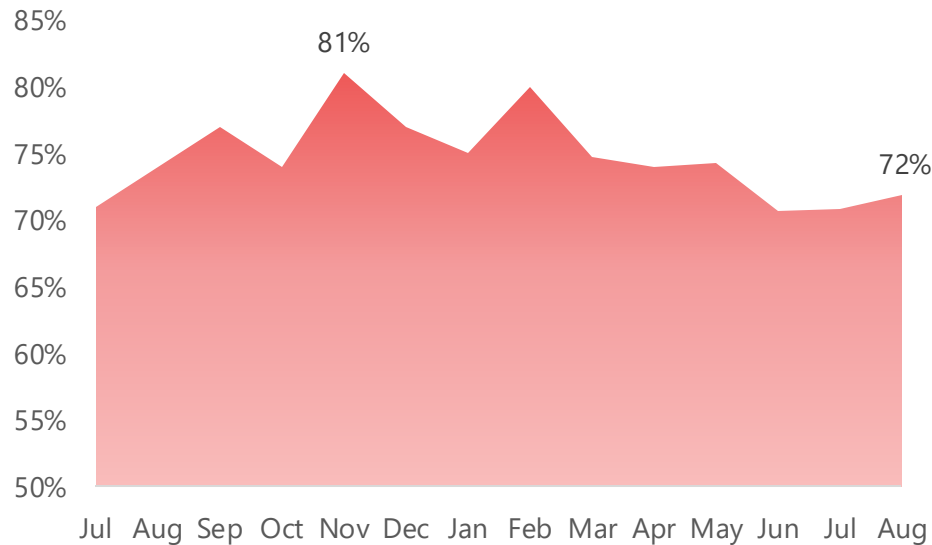
In August 2025, the highest cost of the full JMMI basket was observed in the West (1230)

JMMI basket in August



Financial factors

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



85% of customer KIs aged 60 and above reported that **financial factors affected** their **access to goods** in stores or marketplaces in August.

% of customer KIs reporting that financial factors* affected their access to goods in stores or marketplaces in August, 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	52%	65%	56%	55%	77%	50%
Fuel for vehicle is too expensive	24%	10%	18%	29%	32%	20%
Public transportation is too expensive	5%	15%	8%	5%	6%	11%
Cannot afford the items (despite prices have not risen)	14%	35%	22%	13%	23%	17%
Items are not available	3%	2%	3%	3%	11%	1%
Do not have enough physical cash	1%	3%	2%	-%	4%	1%

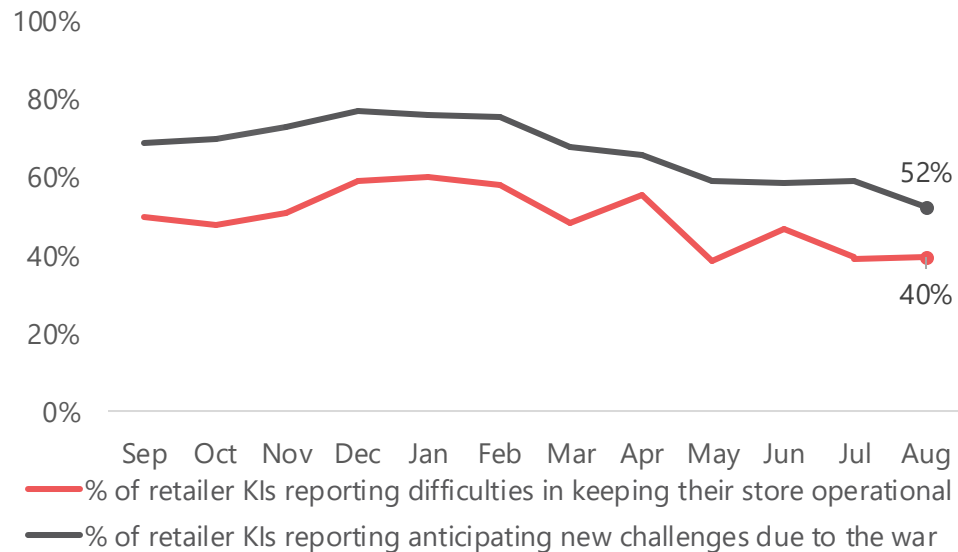


Price increase was reported as the **main financial barrier** to accessing goods by 78% of customer KIs in the Center and 74% in the South. In the East, it was 37%.

* 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 2 difficulties* faced by retailer KIs in keeping their store operational and well-stocked due to the war in August

- 1 **27%** Movement restrictions *The highest value of the indicator was in the North (57%)*
- 2 **15%** Prices charged by suppliers

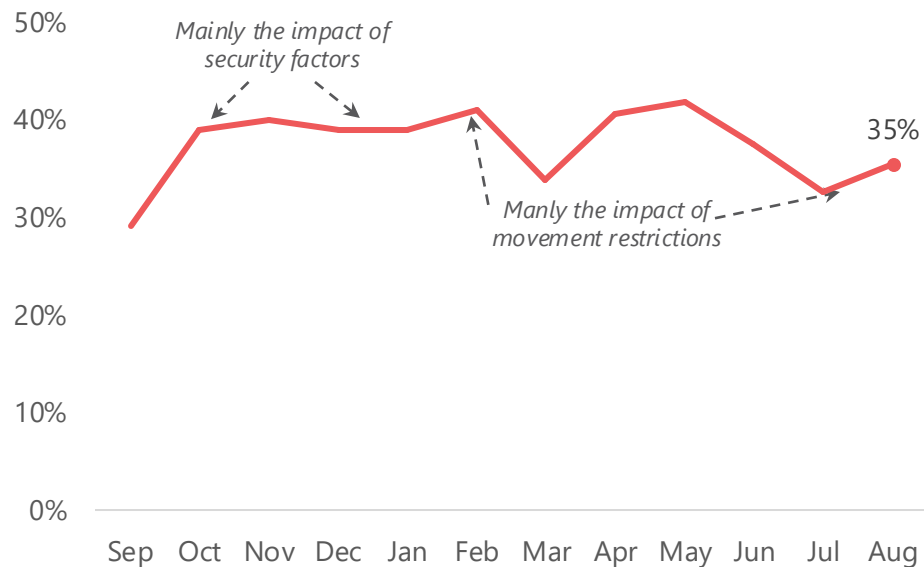
Top 2 challenges* retailer KIs expected to face in the coming months due to the war in August

- 1 **45%** Rising prices
- 2 **22%** 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 August



Active shelling or fighting
100% Donetsk
60% Khersonska
20% Zaporizka



Feeling unsafe due to fear of being targeted
100% Donetsk
60% Khersonska



Movement restrictions
43% Mykolaivska
40% Zaporizka
33% Chernihivska



Buildings or infrastructure have been damaged
40% Donetsk
27% Khersonska



Damage or blockages on roads
40% Donetsk



Lack of transportation
47% Khersonska
40% Donetsk



Power outages
47% Khersonska
20% Donetsk

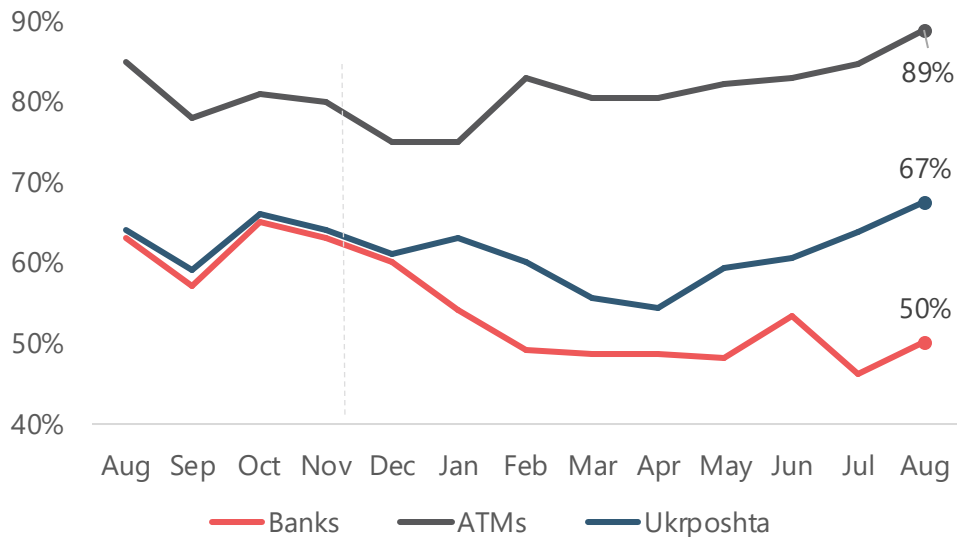


Air alerts
40% Donetsk
21% Kyiv city
20% Khersonska
20% Chernihivska

* 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 36% of customer KIs) and Ukrposhta offices (25%) across the country.

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

Bank branches

Unavailable
33% Khersonska

Air alerts
100% Donetsk
100% Vinnytska
80% Kharkivska
73% Sumska

Accessible only nearby
86% Mykolaivska
50% Kyivska
40% Lvivska

ATMs

No ATM
40% Lvivska
33% Khersonska
14% Mykolaivska

Power outages
60% Donetsk

Limited number of ATMs
40% Donetsk
13% Chernihivska

Ukrposhta offices

Only mobile post offices
29% Mykolaivska
20% Lvivska

Air alerts
100% Vinnytska
100% Kyivska
40% Sumska

Irregular operation: several days a week
67% Zaporizka
40% Donetsk
40% Lvivska

* Respondents could select more than one option.

Thank you for your attention



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