



Joint Market Monitoring Initiative (JMMI) – March 2024

April 2024

REACH

Informing
more effective
humanitarian action



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A light gray world map is centered in the background. Overlaid on the map is a complex, low-poly geometric pattern of thin gray lines that form a network of triangles across the entire page. The map shows the outlines of continents and countries in a slightly darker shade of gray.

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 KIs interviews

Per assessed hromada:

- 3 prices per item
- 5 customer KI interviews



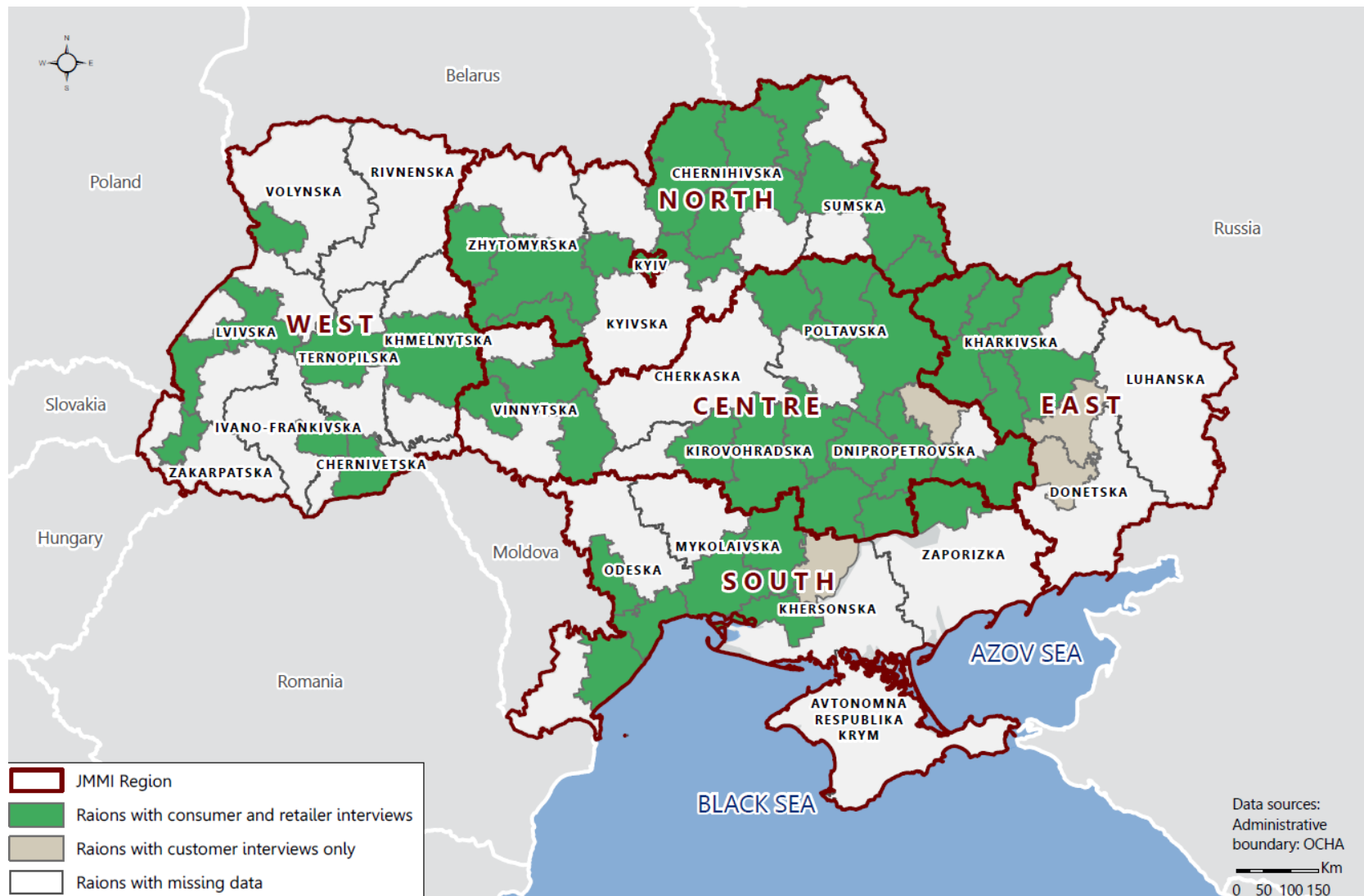
Limitations:

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 March 2024



- 12 Participating partners
- 22 Assessed *oblasts*
- 99 Assessed *hromadas*
- 940 Key informant interviews (KIIs)
- 528 customers surveyed
- 412 retailers surveyed
- 20 Commodities assessed

A light gray world map is centered in the background. Overlaid on the map is a complex, light gray geometric pattern of interconnected lines forming various sized triangles and polygons. The map shows the outlines of continents and countries.

02

Key findings

Key findings



The availability of essential items slightly worsened nationwide, with notable issues in the southern and eastern areas near frontline.



Customers in the areas near frontline faced the unavailability of financial services.



The issue of affordability remained core nationwide, increasing slightly in March.

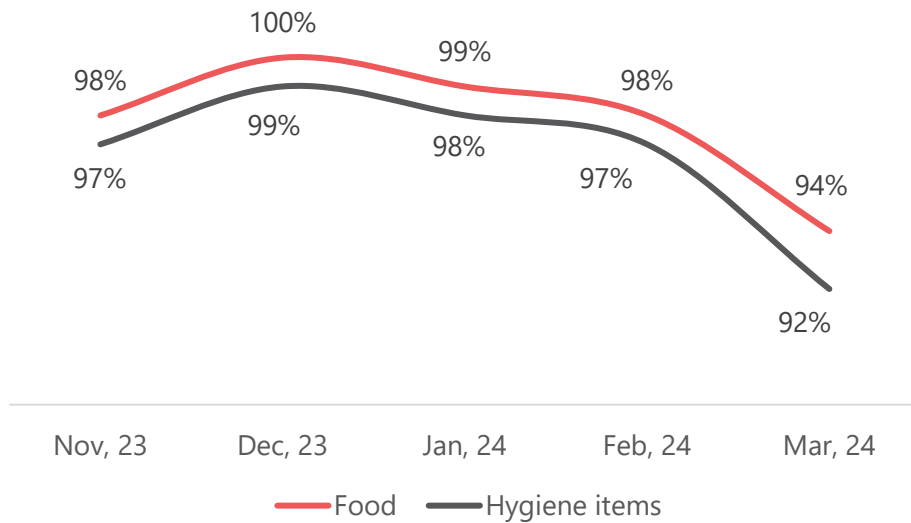
A light gray world map is centered in the background, overlaid with a faint, light gray geometric pattern of interconnected triangles. The map shows the continents of North America, South America, Europe, Africa, Asia, and Australia. The text '03' is positioned above the main title, centered horizontally.

03

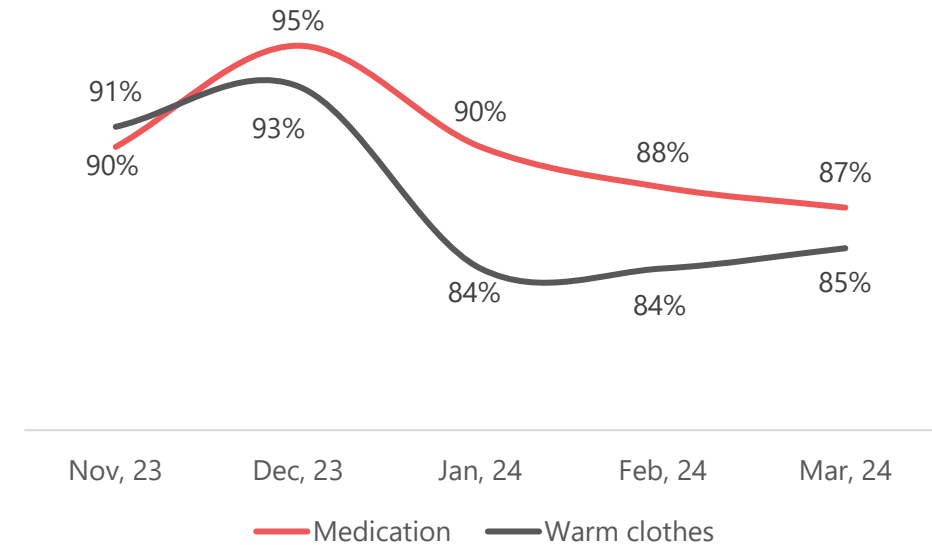
Availability of goods and financial services

Availability of goods

% of customer KIs reported full availability of food and hygiene items, nationally



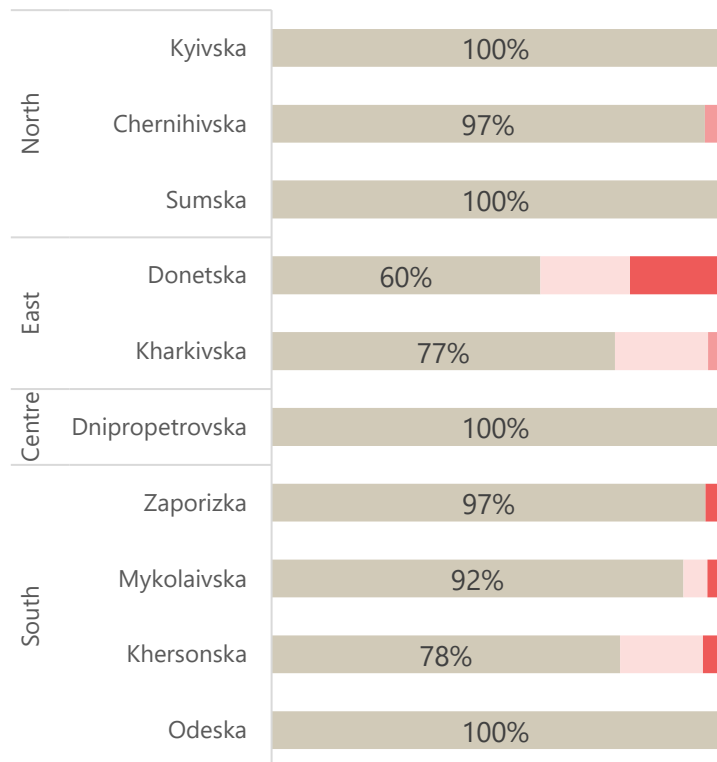
% of customer KIs reported full availability of medication and warm clothes, nationally



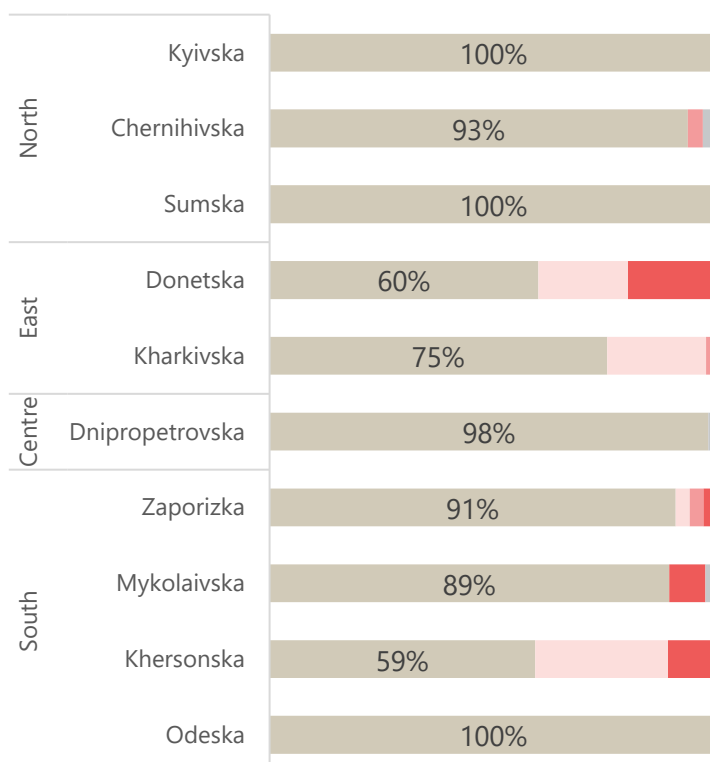
Availability of goods

In March 2024, by oblast*, % of customer KIs who reported the availability of:

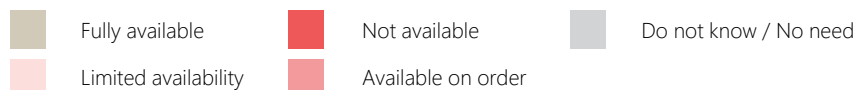
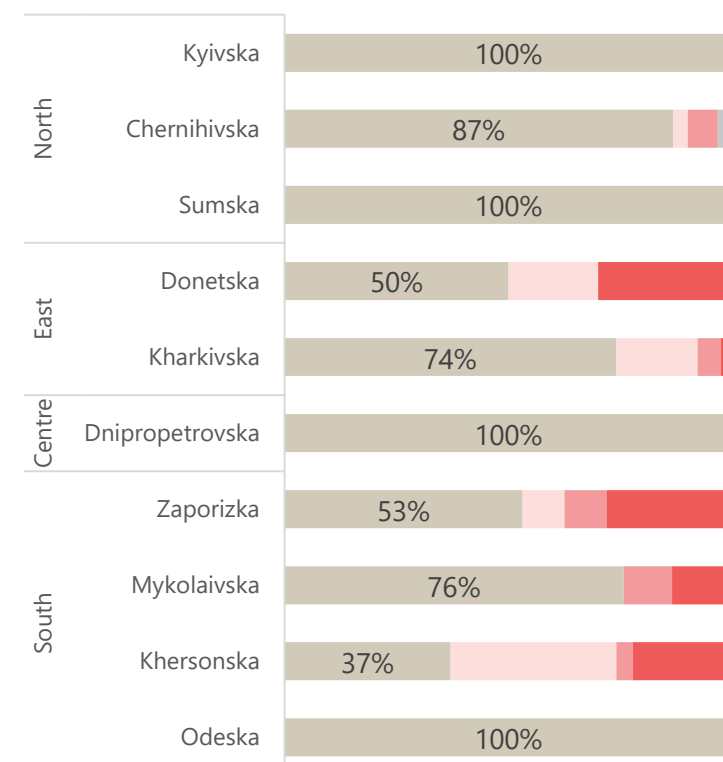
Food items



Hygiene items



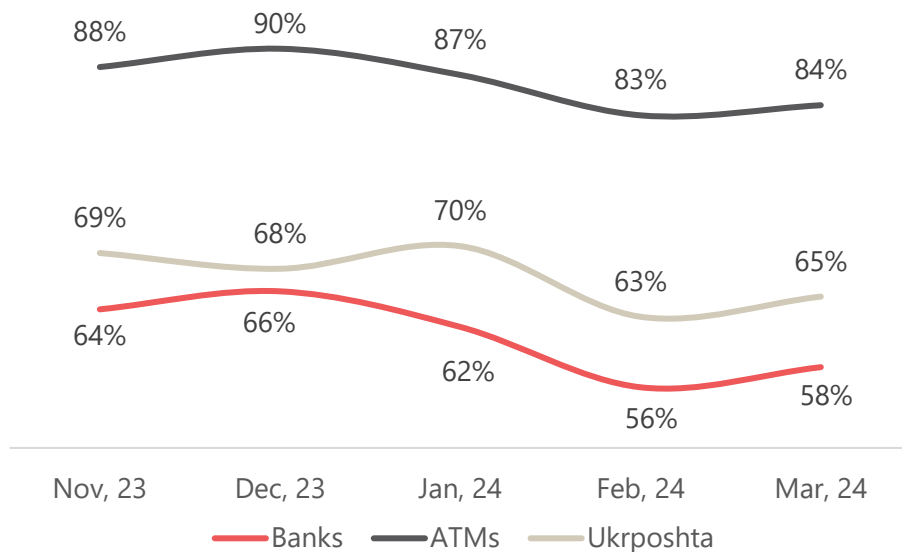
Medication



* In the southern, eastern oblasts, as well as in selected northern and central oblasts.

Availability of financial services

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



In March 2024, % of customer KIs reported:

Temporary interruption in the operation of banks due to air alerts
29% nationally

The unavailability of bank branches in their communities
69% Zaporizka 50% Donetska 48% Khersonska

The absence of ATMs in their communities
63% Zaporizka 50% Donetska 44% Khersonska

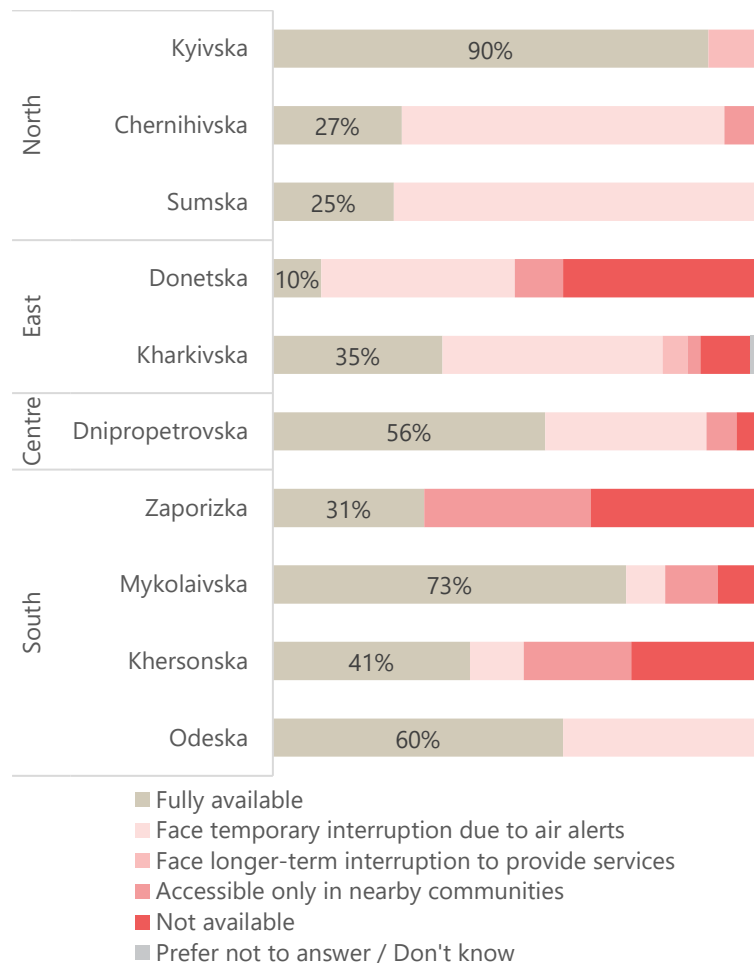
The unavailability of functioning Ukrposhta offices
13% Kharkivska 10% Donetska 7% Khersonska

Temporary interruption in the operation of Ukrposhta offices due to air alerts
25% nationally

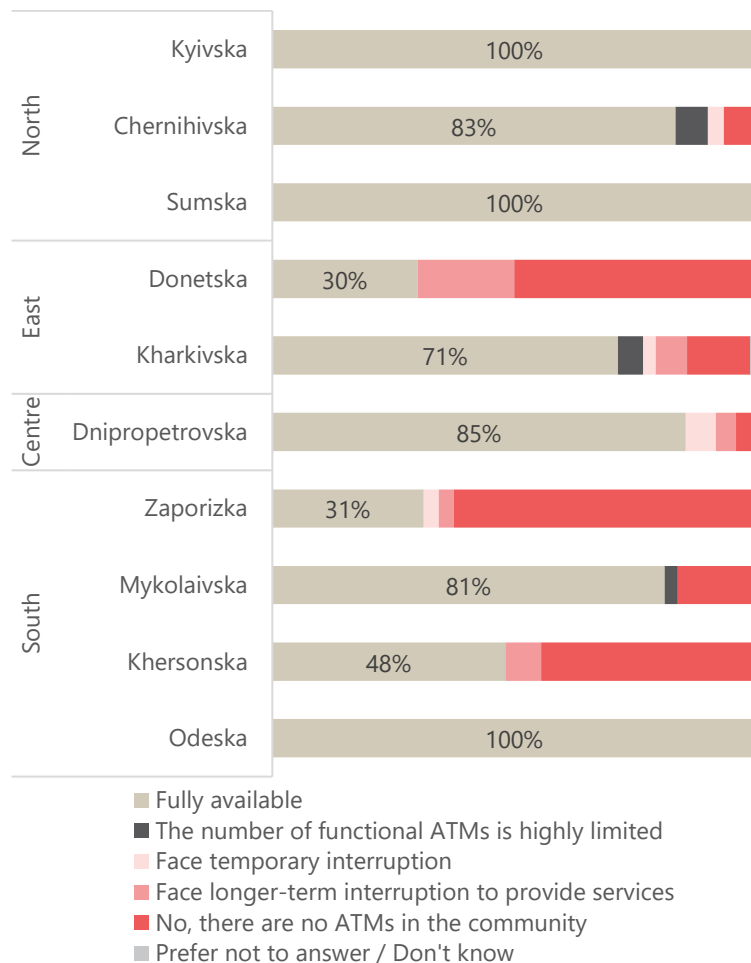
Availability of financial services

In March 2024, by oblast*, % of customer KIs who reported the availability of:

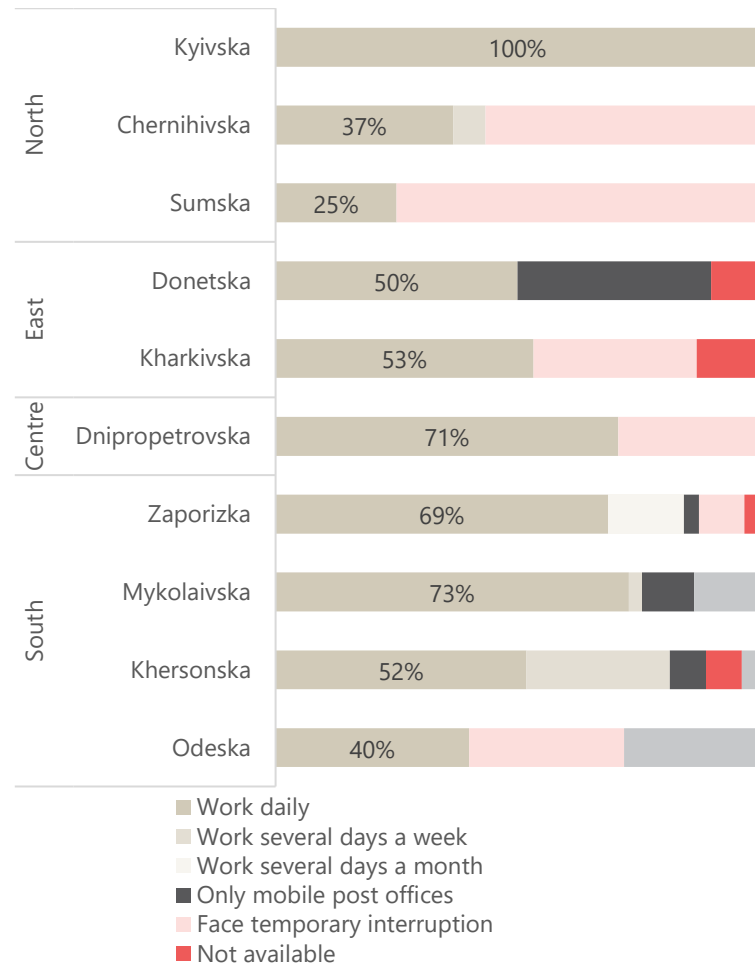
Functioning banks



Functioning ATMs



Functioning Ukrposhta offices



* In the southern, eastern oblasts, as well as in selected northern and central oblasts.

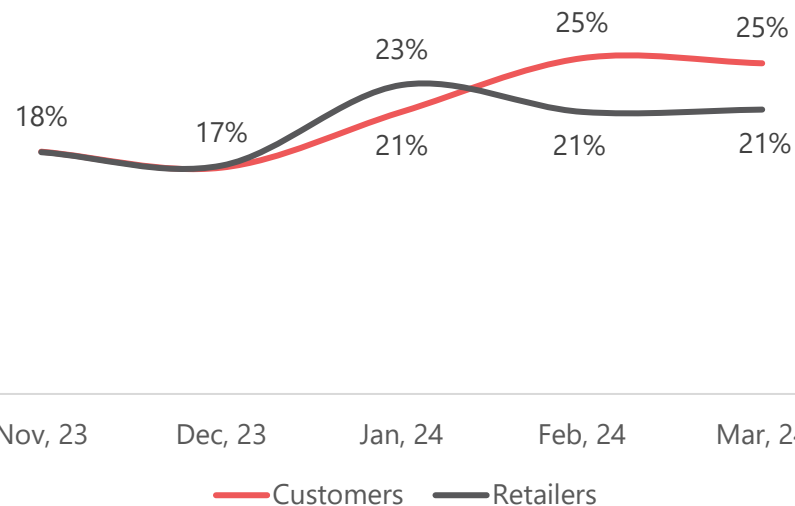
A light gray world map is centered in the background. Overlaid on the map is a complex, light gray geometric pattern of interconnected lines forming various sized triangles and polygons. The number '04' is positioned in the center of the map, over the European continent.

04

Accessibility of stores and markets

Accessibility

% of respondents reporting that full-scale war has affected the ability to access stores, nationally



Main physical barriers to accessing stores or marketplaces reported by customer KIs in March 2024



Active fighting or shelling

80% Donetska
78% Khersonska
17% Kharkivska



Feeling unsafe due to fear of being targeted

50% Donetska
48% Khersonska
34% Zaporizka



Movement restrictions

70% Donetska
44% Khersonska
22% Zaporizka



Buildings or infrastructure have been damaged

59% Khersonska
40% Donetska
40% Kyivska



Damage or blockages on roads

41% Khersonska
13% Zaporizka
10% Kyivska, Donetska



Air alerts

50% Donetska
30% Khersonska
23% Chernihivska



Lack of transportation

50% Donetska
22% Khersonska
14% Mykolaivska



Power outages

40% Donetska
16% Zaporizka
11% Khersonska

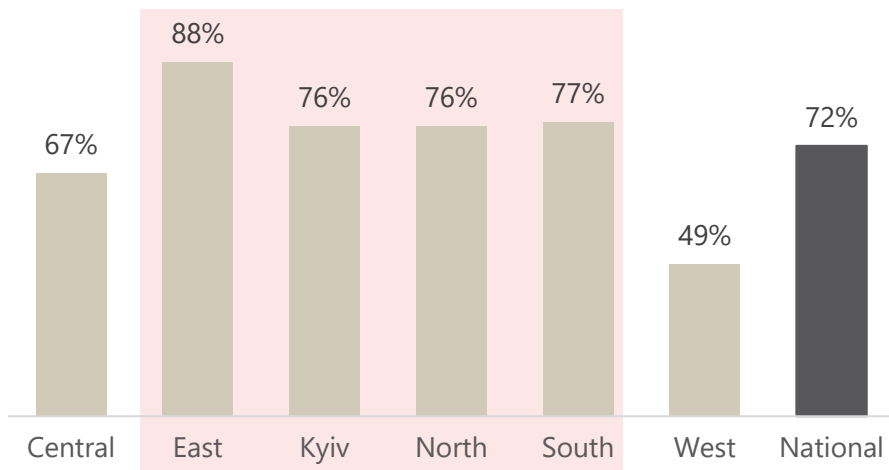


05

Affordability and prices

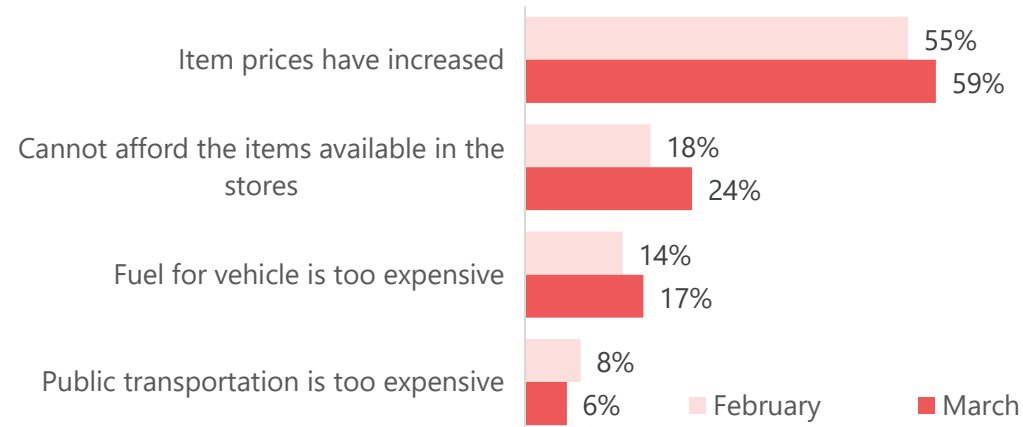
Affordability

% of customers KIs reported that financial factors affected their access to goods in stores or marketplaces in March 2024, by region



The proportion of customer KIs reporting that financial factors affected their access to goods in stores and markets **increased from 67% in February to 72% in March across the country. The main increase occurred in the East (from 64% to 88%) and North (from 66% to 76%).**

Main financial barriers to accessing goods in stores or marketplaces reported by customer KIs in March 2024, nationally



Top 7 oblasts with the highest percentage of customer KIs reporting that financial factors affected their access to goods in stores or marketplaces in March 2024

100% Sumska

90% Kyivska

100% Donetsk

87% Kharkivska

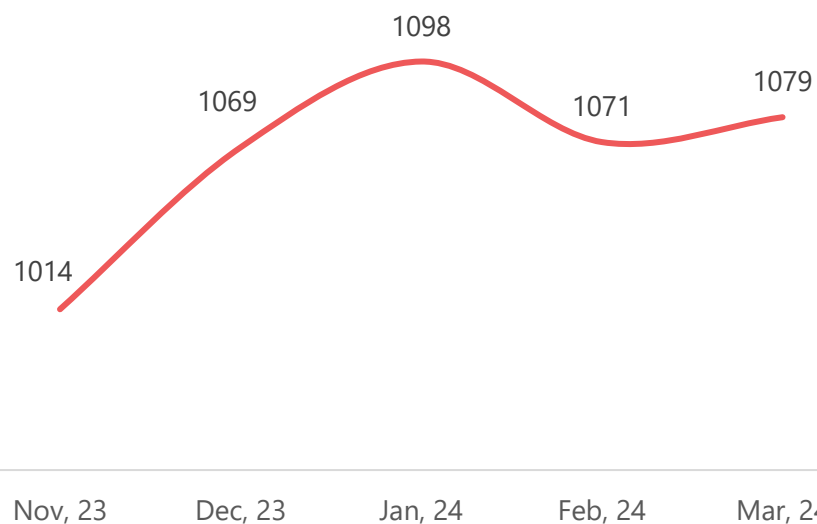
97% Zaporizka

87% Chernihivska

93% Khersonska

JMMI basket

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



JMMI basket in March 2024:

Full JMMI Basket **1079 UAH**



+1% to February 2024

-10% to March 2023

Food Basket **515 UAH**



-2% to February 2024

-19% to March 2023

Non-Food (Hygiene) Basket **564 UAH**



+3% to February 2024

0% to March 2023

Prices

Median prices (in UAH) of food items in March 2024, nationally

Item	Unit	Median prices (in UAH)	Change since February 2024	Change since March 2023
Bread	500 g	18	1%	0%
Buckwheat	1 kg	28	-9%	-56%
Cabbage	1 kg	15	-5%	-40%
Carrots	1 kg	13	-13%	-70%
Chicken (legs, fresh)	1 kg	107	2%	13%
Complementary cereal	200 g	94	9%	20%
Eggs (chicken)	10 pcs	40	-21%	-37%
Milk (2.5%, fresh)	900 mL	34	1%	5%
Oil (sunflower, refined)	900 mL	45	-3%	-26%
Onions	1 kg	17	-4%	-68%
Potatoes	1 kg	23	-2%	157%
Rice (round)	1 kg	50	-2%	-15%
Water	1.5 L	14	-5%	-3%
Wheat flour (white)	1 kg	17	-4%	-11%
Total		515	-2%	-19%

Prices

Median prices (in UAH) of non-food (hygiene) items in March 2024, nationally

Item	Unit	Median prices (in UAH)	Change since February 2024	Change since March 2023
Body soap	1 bar (75 g)	13	2%	-7%
Diapers (infant)	1 pack (40-60 pcs)	402	5%	0%
Hygiene pads	1 pack (10pcs)	43	4%	12%
Laundry soap	1 kg	20	-6%	-4%
Toothpaste	1 kg	38	-1%	6%
Washing powder	200 g	47	-3%	-2%
Total		564	3%	0%

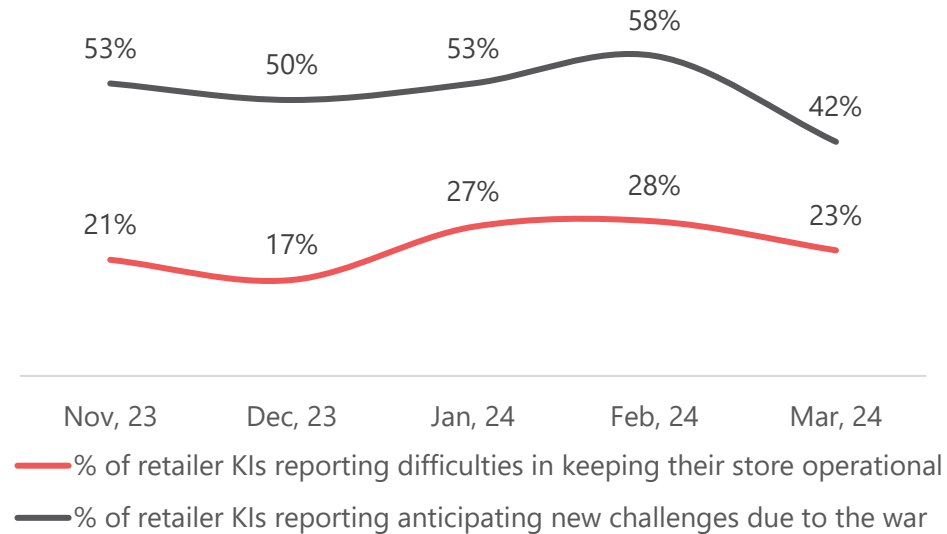
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06

Market functionality

Market functionality

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



32% of retailer KIs in the South, 15% in the East, and 12% in the North reported some structural or severe damage

Main difficulties in maintaining operational and well-stocked stores reported by retailer KIs in March 2024

- 1 16% nationally**
Price increase among suppliers
- 2 13% in the North, 10% in the West, 8% in the South**
Full staffing
- 19% in the South, 12% in the East**
Physical danger in the area

Top 2 challenges retailer KIs expect to face in the coming months due to the war, nationally

- 1 32%** Rising prices
- 2 29%** Reduced purchasing power of customers

A light gray world map is centered on the slide, showing the outlines of continents. Overlaid on the map is a faint, light gray geometric pattern of interconnected lines forming a network of triangles and polygons. The number '07' is displayed in a bold, red, sans-serif font, positioned centrally over the map.

07

Conclusion

Concluding remarks

Availability issues regarding essential items were most frequently reported in the South and East, namely in Donetsk, Kharkivska, Khersonska, Zaporizka, and Mykolaivska oblasts.

Customer KIs in the areas near the frontline faced **the unavailability of functioning banks, ATMs, and Ukrposhta offices**.

The issue of affordability remained crucial nationwide, increasing slightly in March, with 59% of customer KIs reporting increased prices as their primary barrier to accessing goods in markets, and 24% reported inability to afford goods available in stores.

Multi-purpose cash assistance could still be relevant for most of the country, in terms of humanitarian response. A differentiated approach to aid selection, whether cash or in-kind assistance, may be necessary in the areas near the frontline, namely in Donetsk, Kharkivska, Khersonska, Zaporizka, and Mykolaivska oblasts.

Thank you for your attention



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