



# Joint Market Monitoring Initiative (JMMI)

## December 2024

REACH Ukraine

**REACH** Informing  
more effective  
humanitarian action

**IMPACT** Shaping practices  
Influencing policies  
Impacting lives  
**REACH | PANDA | AGORA**



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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 text '01' is positioned in the center of the map, slightly above the word 'Methodology'.

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 December 2024



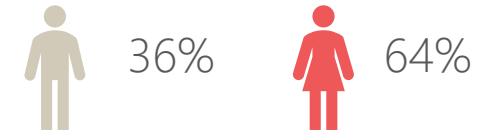
**13** Participating partners

**19** Assessed *oblasts*

**102** Assessed *hromadas*

**880** Key informant interviews (KIIs)

**537** customers surveyed



**343** retailers surveyed

**20** Commodities assessed

# Partners



# Donors



Foreign, Commonwealth  
& Development Office

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02

# Key findings



# Key findings

**In December, local markets continued to function reliably, effectively supplying basic needs nationwide despite increased challenges faced by retailers, including a worsening security situation, power cuts, rising business costs, and accelerating prices.** However, in the East and South, namely in Donetsk, Kharkivska, Khersonska, and Zaporizka oblasts, customer KIs were more likely to report restricted access to markets due to security concerns. In some frontline hromadas, customers also faced shortages of essential items and fuels, as well as limited access to cash due to the absence or insufficient functioning of bank branches and ATMs.

**Inflation for consumer goods and services accelerated annually, reaching 12% in December,** driven largely by continued increases in food prices.

The median cost of the full JMMI basket rose by 15% over the year, with the highest value in December recorded in the North, specifically in Chernihivska oblast. **The food component of the JMMI basket experienced the sharpest price increases, rising by 23%. Notably, the most significant annual surges in prices were observed for vegetables, including cabbage (+201%), carrots (+143%), and potatoes (+85%).**

**Nationwide, rising prices have severely impacted access to goods,** with 70% of customer KIs citing higher prices as their primary financial barrier. **The elderly population was particularly affected,** with 90% of customer KIs aged 60 and above reporting that they could not afford essential items available in stores. This issue was most prevalent in the North and East.



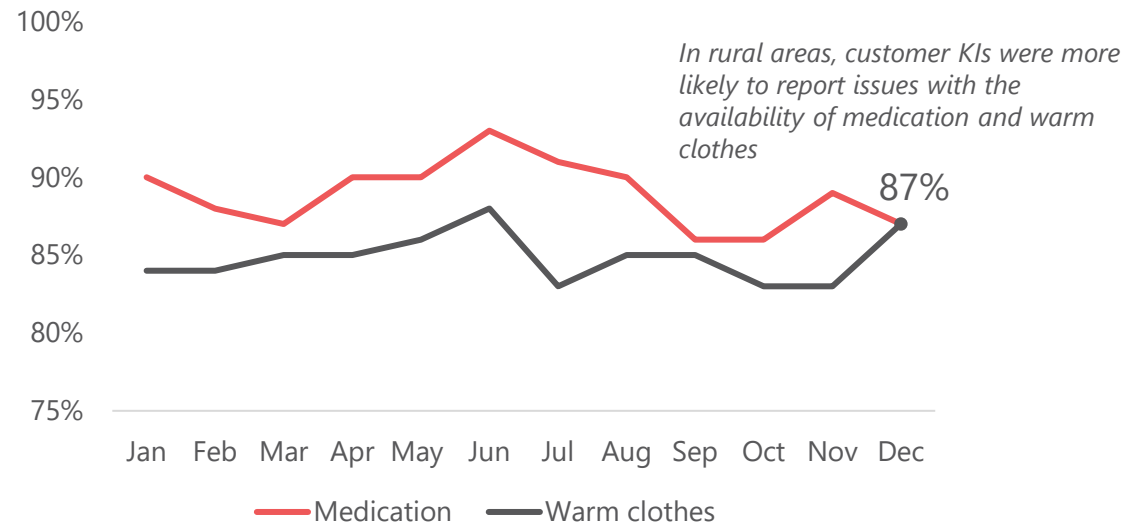
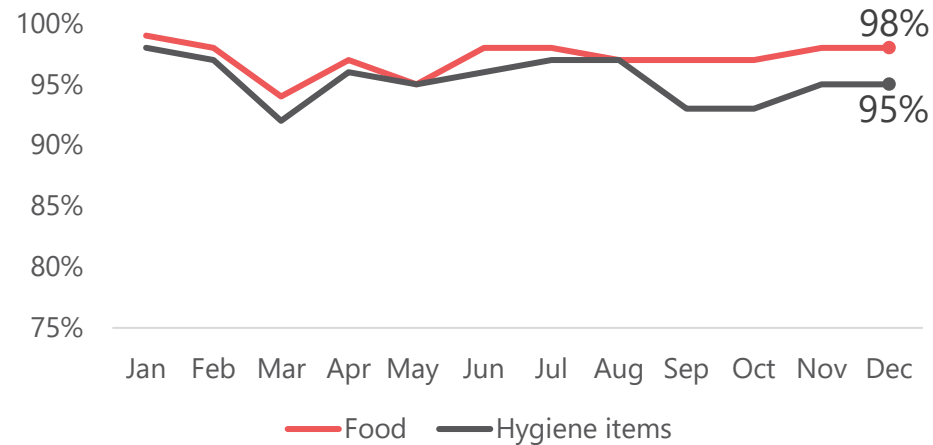
A light gray world map is centered in the background. Overlaid on the map is a complex, light gray geometric pattern of interconnected lines forming various sized triangles and polygons. The number '03' is printed in a bold, red, sans-serif font, positioned centrally over the map's landmasses.

03

# Market overview

# Availability of goods

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



% of customer KIs reporting availability issues\* with essential items in the East and South in December

	Food items	Hygiene items	Warm clothes	Medication
East	5%	6%	17%	10%
South	5%	6%	17%	15%
National	2%	5%	9%	6%

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

Hromadas in which customer KIs in December reported the unavailability of:

Food items
Pokrovska ( <b>Donetska</b> ) Berezhnevatska ( <b>Mykolaivska</b> ) Beryslavska ( <b>Khersonska</b> )

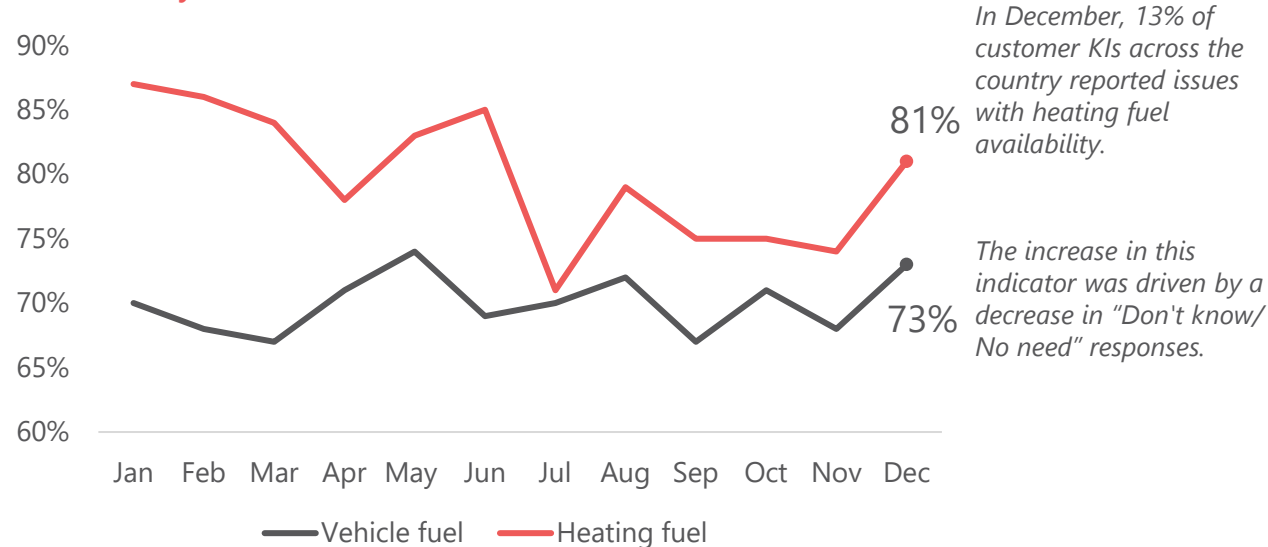
Hygiene items
Pokrovska ( <b>Donetska</b> ) Berezhnevatska ( <b>Mykolaivska</b> ) Beryslavska ( <b>Khersonska</b> )

Warm clothes
Slovianska ( <b>Dnipropetrovska</b> ) Pokrovska ( <b>Donetska</b> ) Stepnenska ( <b>Zaporizka</b> ) Berezhnevatska ( <b>Mykolaivska</b> ) Beryslavska, Borozenska, Novovorontsovska ( <b>Khersonska</b> )

Medication
Slovianska ( <b>Dnipropetrovska</b> ) Pokrovska ( <b>Donetska</b> ) Berezhnevatska ( <b>Mykolaivska</b> ) Beryslavska, Novovorontsovska ( <b>Khersonska</b> )

# Availability of fuels

## % of customer KIs reporting full availability of fuels, nationally



## Hromadas in which customer KIs in December reported the unavailability of:

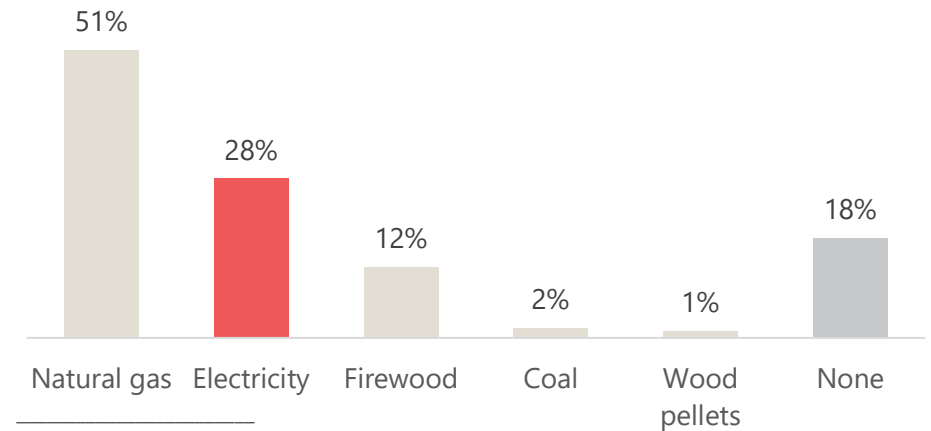
### Heating fuel

Pokrovska (**Donetska**)  
Berezhnevatska (**Mykolaivska**)  
Beryslavska (**Khersonska**)

### Vehicle fuel

Pokrovska (**Donetska**)  
Stepnenska, Shyrokivska (**Zaporizka**)  
Berezhnevatska (**Mykolaivska**)  
Beryslavska, Borozenska,  
Novovorontsovska (**Khersonska**)

## % of customer KIs reporting they regularly purchased electricity for heating purposes\* in December, nationally



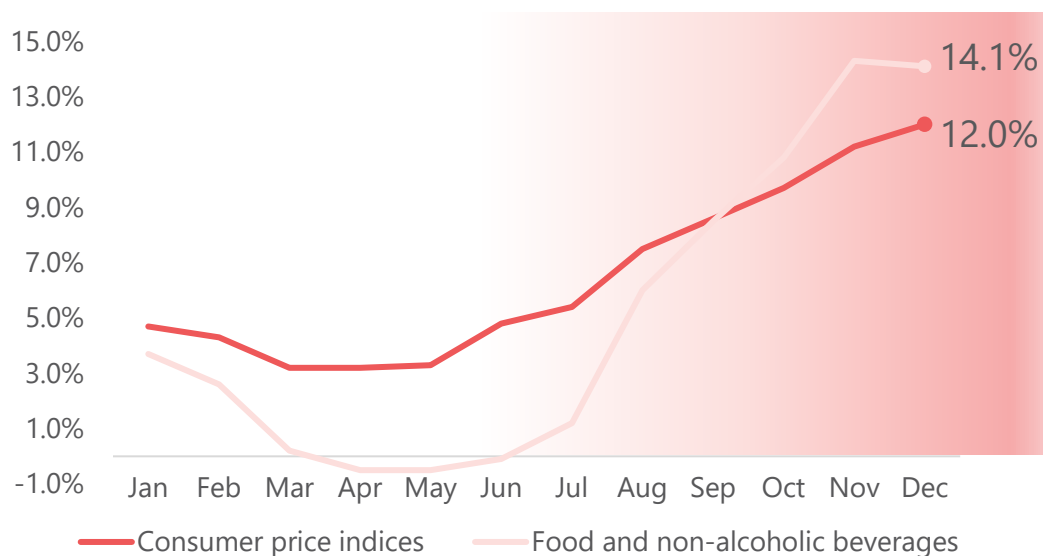
\* Respondents could select more than one option.

Ukraine's power system remaining operational despite continuing challenges and capacity losses due to ongoing shelling and emergency and stabilization blackouts.

The increasing energy deficit presents substantial risks during the heating season, particularly for households relying exclusively on electricity for heating and cooking.

# Prices

## Annual inflation rate\*, %



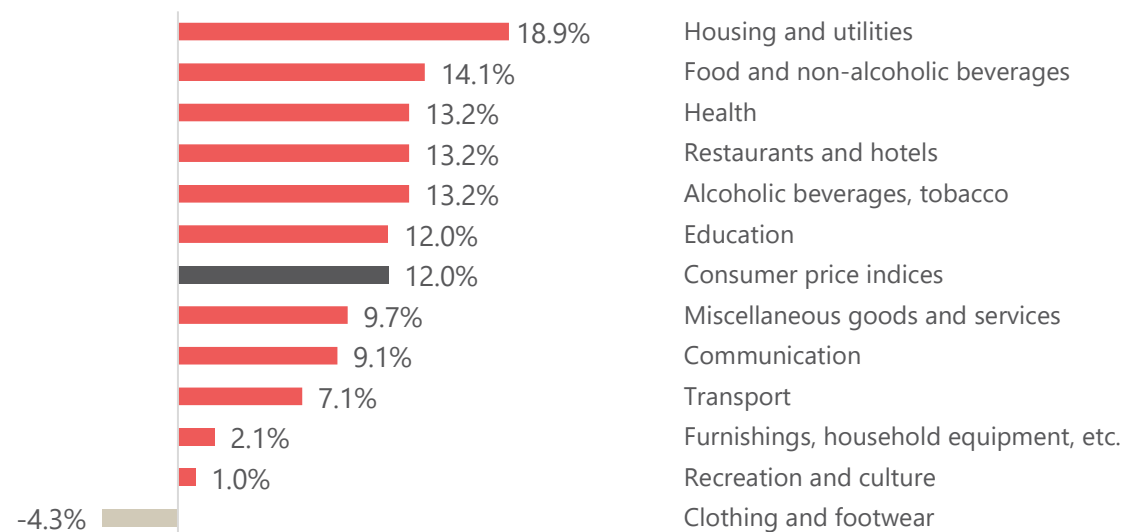
Source: SSSU



**Electricity, vegetable, and butter prices increased the most annually (by 63.6%, 48.3%, and 33.9% respectively).**

The increase in inflation was primarily driven by a reduction in the supply of certain food products, increased production costs, and the effects of the exchange rate depreciation\*\*.

## Consumer price changes (%) for groups of goods and services, from December 2023 to December 2024



Source: SSSU

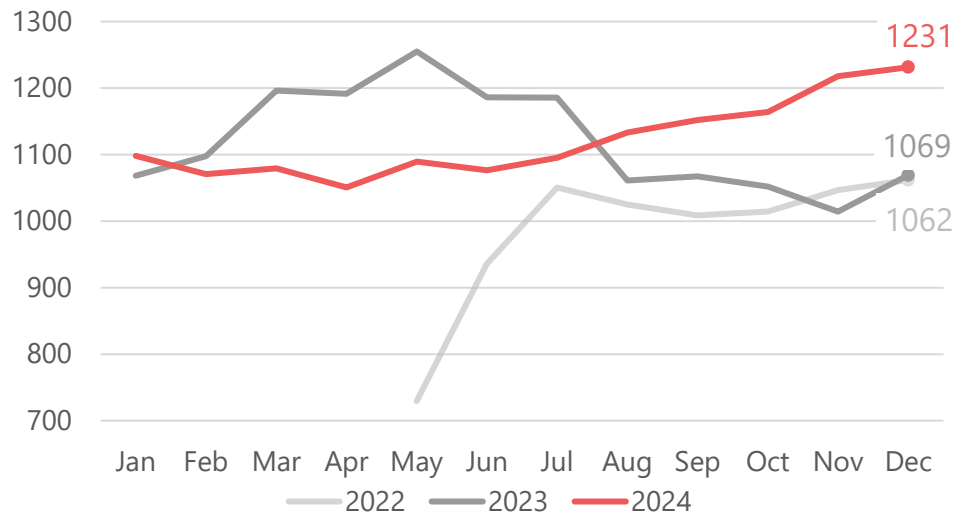
Monthly inflation\* eased to 1.4% in December compared to 1.9% in November. Prices for food and non-alcoholic beverages increased by 1.8% in December.

\* 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](#), 6 January 2025.

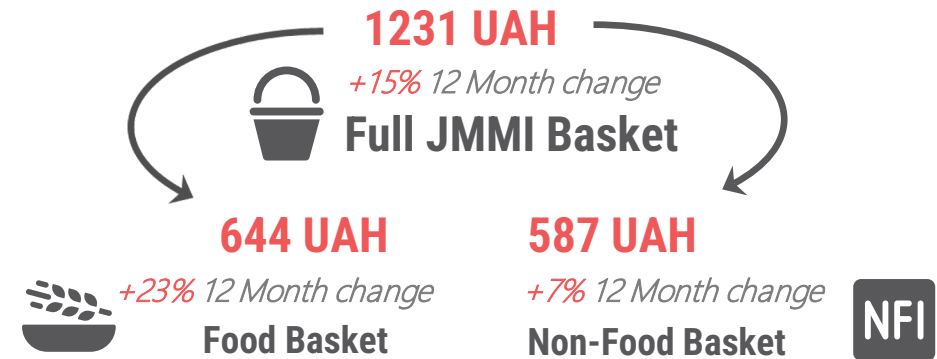
# Prices for items in the JMMI basket

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

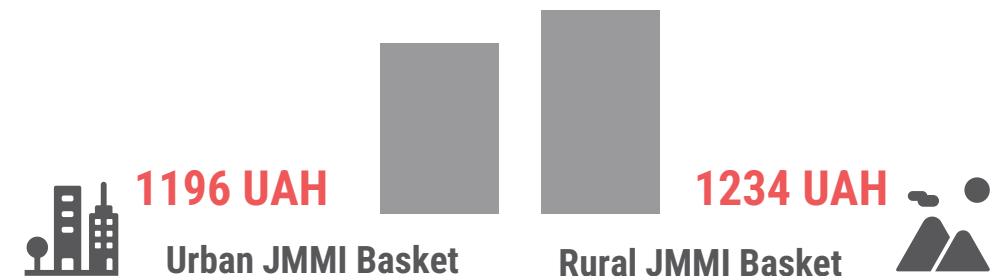


In December 2024, the highest cost of the full JMMI basket was observed in the North (1309 UAH), and specifically, in Chernihivska oblast (1356 UAH).

JMMI basket in December



JMMI basket in December, by type of area



# Prices for items in the JMMI basket

## Median food prices (in UAH) in the JMMI basket, nationally

	Unit	Dec, 23	Dec, 24	12 Month change*, %
Bread	500 g	20	22	+9%
Buckwheat	1 kg	29	34	+16%
Cabbage	1 kg	12	36	+201%
Carrots	1 kg	12	29	+143%
Chicken (legs, fresh)	1 kg	109	113	+4%
Complementary cereal	200 g	80	103	+29%
Eggs (chicken)	10 pcs	56	66	+17%
Milk (2.5%, fresh)	1 L	34	42	+24%
Oil (sunflower)	1 L	51	62	+22%
Onions	1 kg	16	18	+11%
Potatoes	1 kg	16	29	+85%
Rice (round)	1 kg	52	53	+1%
Water	1.5 L	16	15	-4%
Wheat flour (white)	1 kg	19	22	+19%

 December 2023  December 2024

## Median non-food prices (in UAH) in the JMMI basket, nationally

	Unit	Dec, 23	Dec, 24	12 Month change*, %
Body soap	75 g	12	14	+14%
Diapers (infant)	40-60 pcs	389	416	+7%
Hygiene/sanitary pads	10 pcs	41	45	+12%
Laundry soap	200 g	20	20	-3%
Toothpaste	75 ml	37	42	+12%
Washing powder	500 g	48	51	+6%

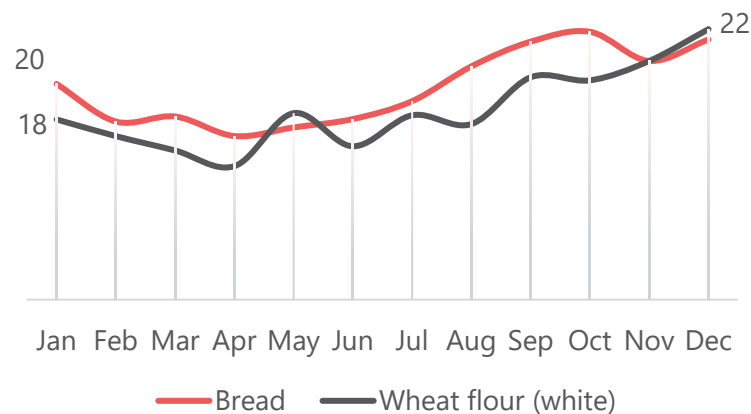
Within the full JMMI basket, the highest annual price increases were observed for cabbage (+201%), carrots (+143%), and potatoes (+85%).

\* Prices were calculated with kopecks.

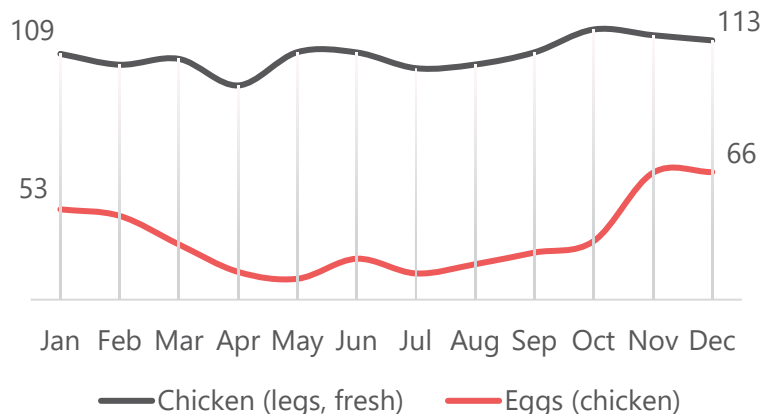
# Prices for items in the JMMI basket

Trends in median food prices (in UAH) in the JMMI basket, nationally

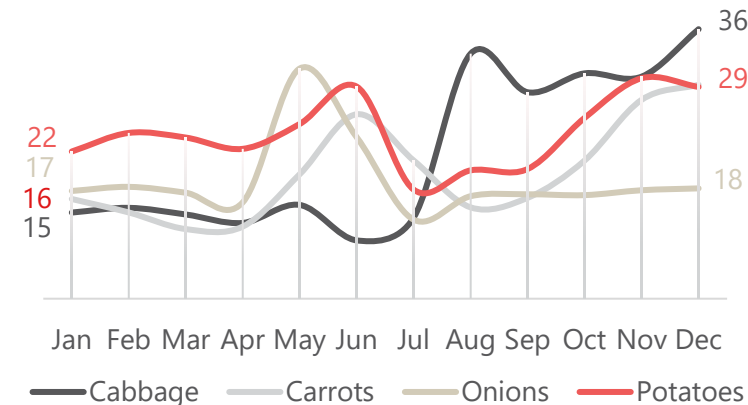
## Bread and wheat flour



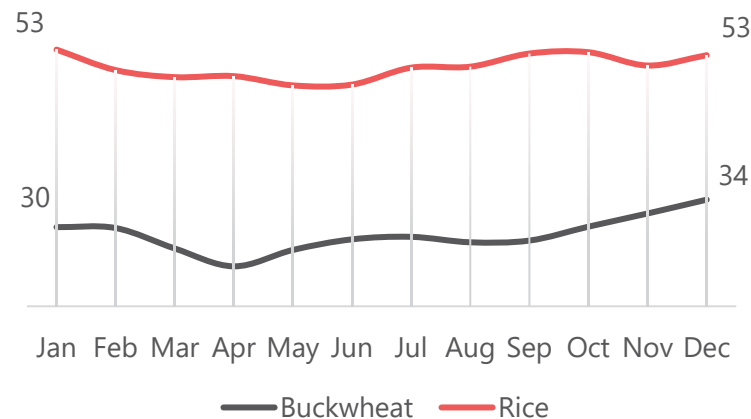
## Chicken (legs) and eggs (chicken)



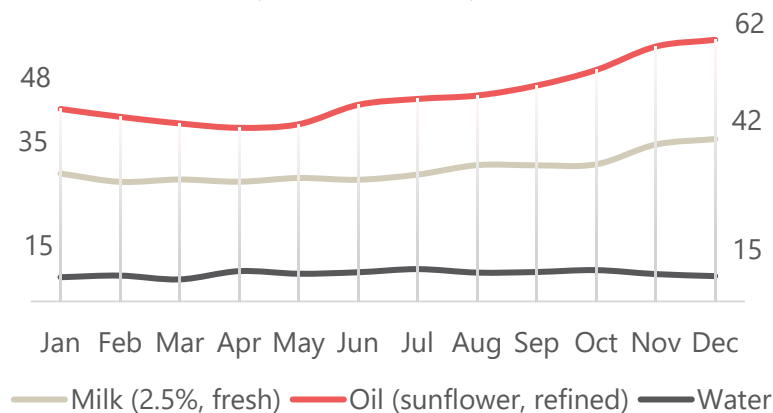
## Vegetables



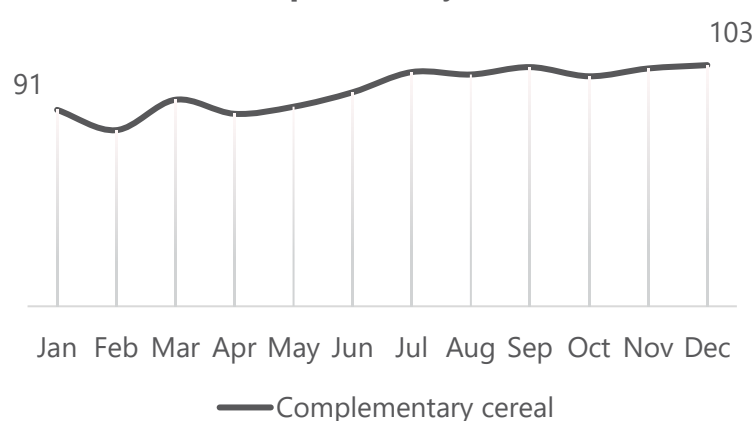
## Buckwheat and rice



## Milk, sunflower oil, and water



## Complementary cereal

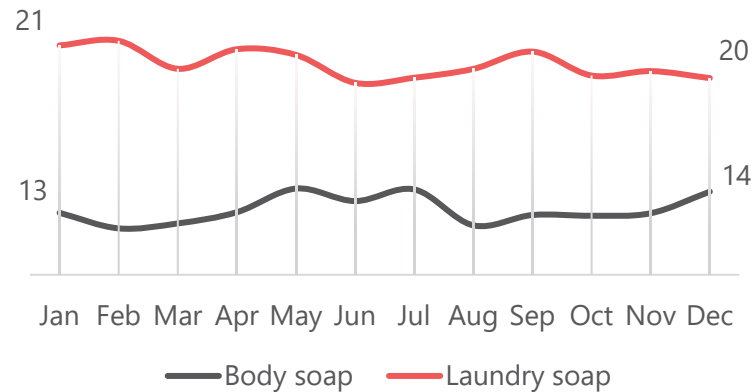




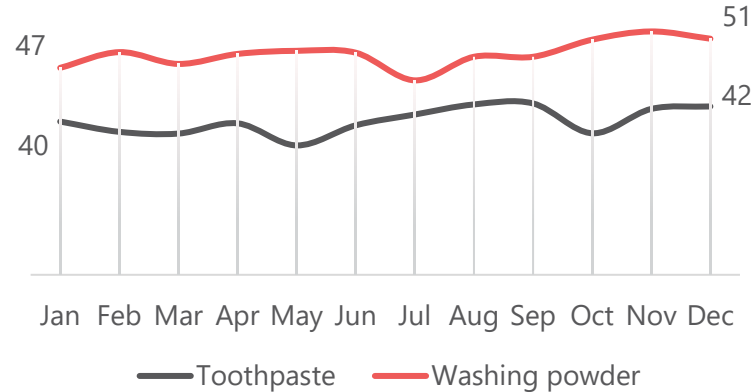
# Prices for items in the JMMI basket

Trends in median non-food prices (in UAH) in the JMMI basket, nationally

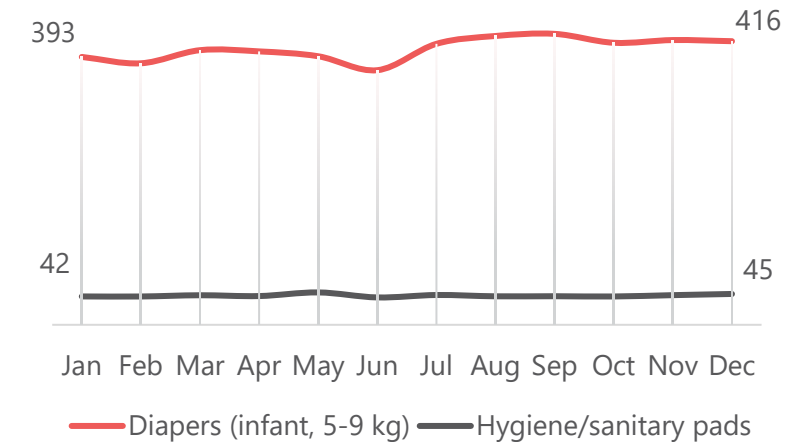
## Body soap and laundry soap



## Toothpaste and washing powder

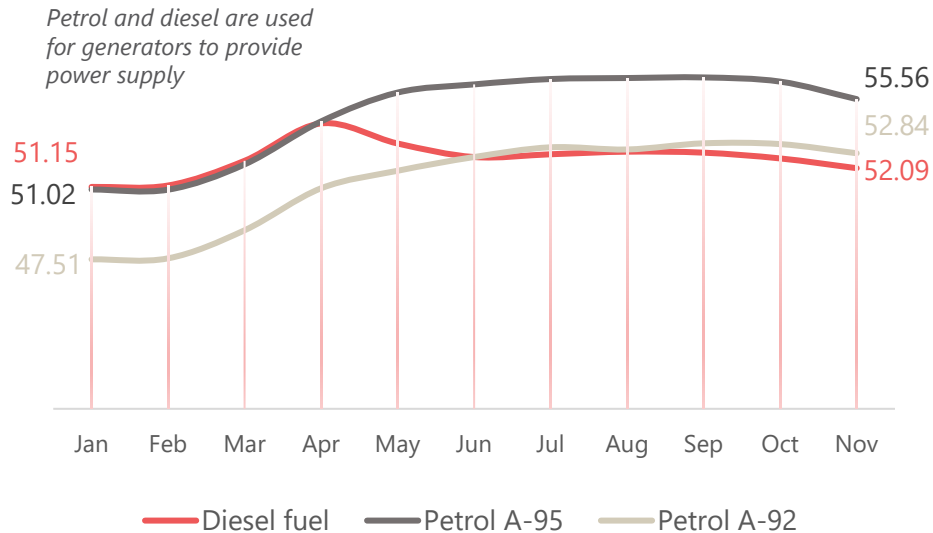


## Diapers for infants and sanitary pads



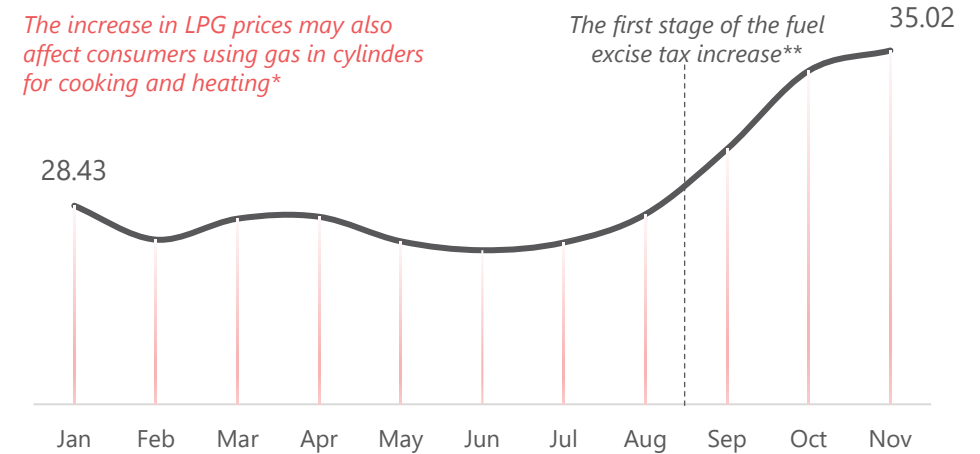
# Prices for fuels

## Average vehicle fuel prices (UAH per litre)



Source: SSSU

## Average liquefied petroleum gas (LPG) prices (UAH per litre)



Source: SSSU

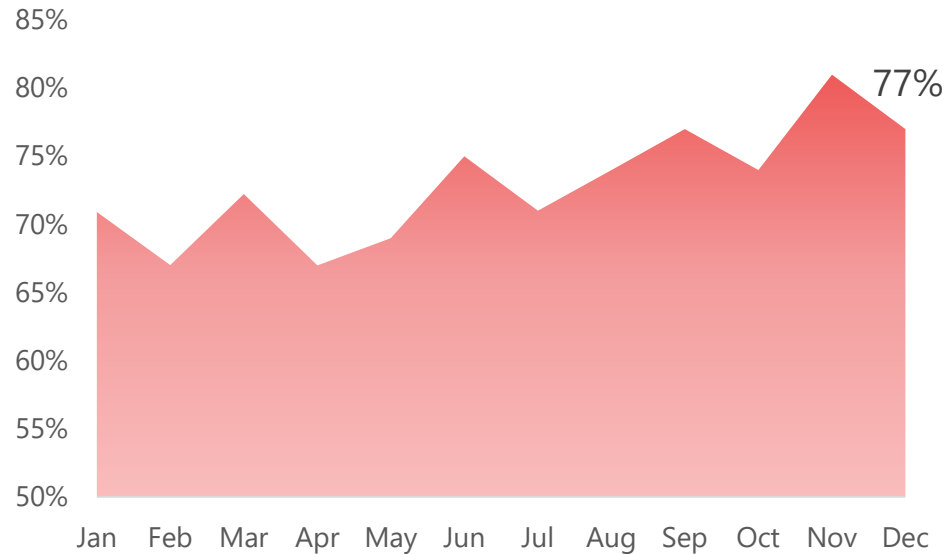
Fuel price increases for **petrol and diesel** were restrained by subdued demand amid ample supply and a predominantly downward trend in global crude oil prices. **LPG** prices rose mainly due to higher excise taxes, a seasonal surge in demand in European countries, and the anticipation of the European Union's suspension of gas purchases from Russia.

\* According to secondary sources, LPG are used by households for cooking and heating. Before the war started, the largest user oblasts were Vinnytska, Kirovohradska, Odeska, and Kharkivska (and other settlements that have not been gasified). Since the beginning of the war, the number of users of cylinder gas has increased sharply in the frontline areas, de-occupied areas due to damage to the natural gas supply infrastructure and the lack of electricity, as well as in other areas during blackouts. Due to the war, more than half of the cylinders are filled at petrol stations.

\*\* On 1 September 2024, the excise taxes on petrol increased from EUR 213.5 to EUR 242.6. Diesel rates increased from 139.5 EUR to 177.6 EUR. Autogas rates increased from EUR 52 to EUR 148. This is the first stage of the government's planned increase in excise tax rates on fuel to the minimum level set by the European Union.

# Affordability

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



**90%** of customer KIs aged 60 and above reported that financial factors affected their access to goods in stores or marketplaces in December.  
This indicator was the highest in the North and East (100%).

% of customers KIs reporting that financial factors\* affected their access to goods in stores or marketplaces in December, 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	67%	84%	72%	69%	70%	71%
Fuel for vehicle is too expensive	21%	10%	11%	33%	18%	19%
Public transportation is too expensive	9%	16%	14%	5%	11%	11%
Cannot afford the items (despite prices have not risen)	7%	7%	10%	4%	15%	4%
Items are not available	3%	1%	3%	1%	3%	2%
Do not have enough physical cash	2%	2%	3%	1%	2%	2%

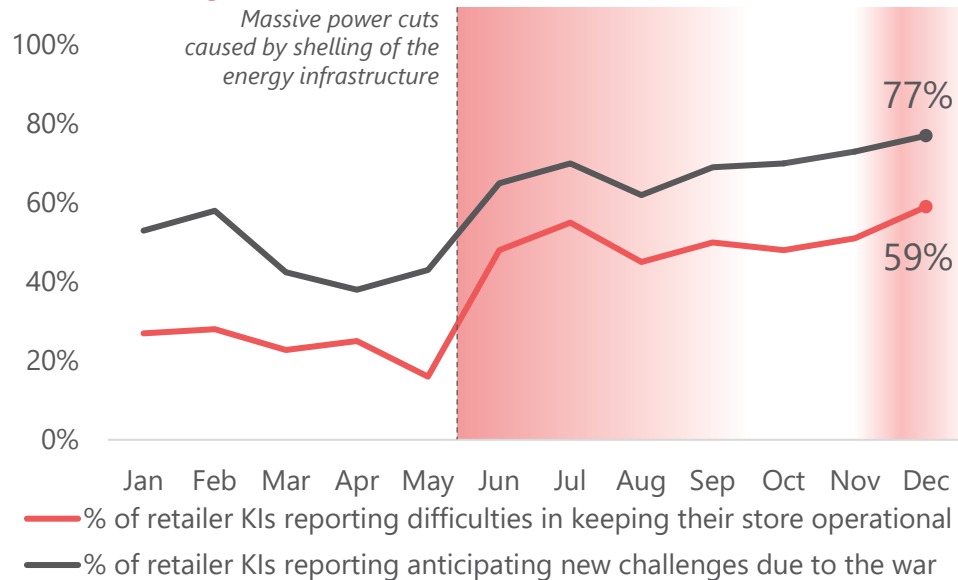


The East saw the largest increase in the proportion of customer KIs reporting price increases as the main financial barrier to accessing goods (up from 58% in January to 82% in December).

\* 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



Retailer KIs in Blyzniukivska and Slobozhanska hromadas of **Kharkivska Oblast** faced some restocking issues, reportedly requiring two weeks to resupply wheat flour, rice, buckwheat, complementary cereal for babies, as well as diapers for infants, body soap, laundry soap, powder, toothpaste, and pads.

Top 3 difficulties\* faced by retailer KIs in keeping their store operational and well-stocked due to the war in December

- 1 **28%** Price increase charged by suppliers *The highest value of the indicator was in the East (56%)*
- 2 **24%** Movement restrictions  
Storage of goods during the absence of electricity
- 3 **18%** Fully staffing the store

The factors leading to difficulties keeping stores operational and well-stocked included the worsening security situation, more intense missile and drone attacks on energy facilities and the long time required to repair these facilities, further growth in energy, labor and logistics costs for businesses, accelerating inflation, declining investment demand, a shortage of skilled workers, and seasonal factors\*\*.

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

- 1 **70%** Rising prices
- 2 **50%** Reduced purchasing power of customers

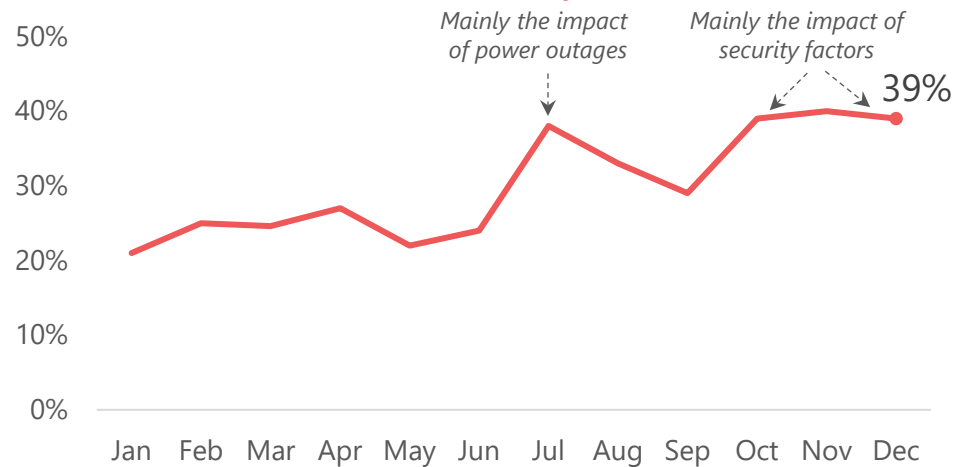
\* Respondents could select more than one option.

\*\* National Bank of Ukraine, [Monthly Business Outlook Survey](#), December 2024, 2 January 2025.

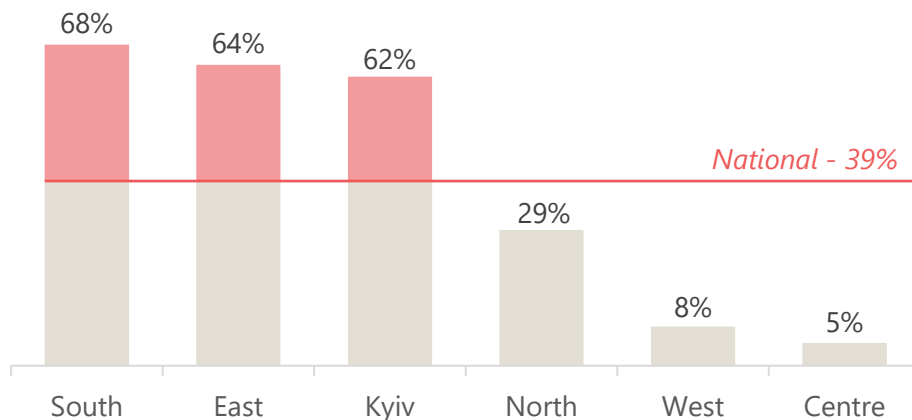
# Accessibility of stores and markets

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

## Nationally



## In December, by region



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



Active fighting or shelling

100% Donetska  
62% Khersonska  
24% Zaporizka



Feeling unsafe due to fear of being targeted

90% Donetska  
41% Kharkivska  
33% Khersonska



Movement restrictions

90% Donetska  
47% Odeska  
43% Khersonska  
40% Kharkivska



Buildings or infrastructure have been damaged

60% Donetska  
21% Khersonska



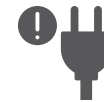
Damage or blockages on roads

20% Donetska



Lack of transportation

50% Donetska  
12% Kharkivska



Power outages

50% Donetska  
17% Mykolaivska



Air alerts

60% Chernihivska  
50% Donetska

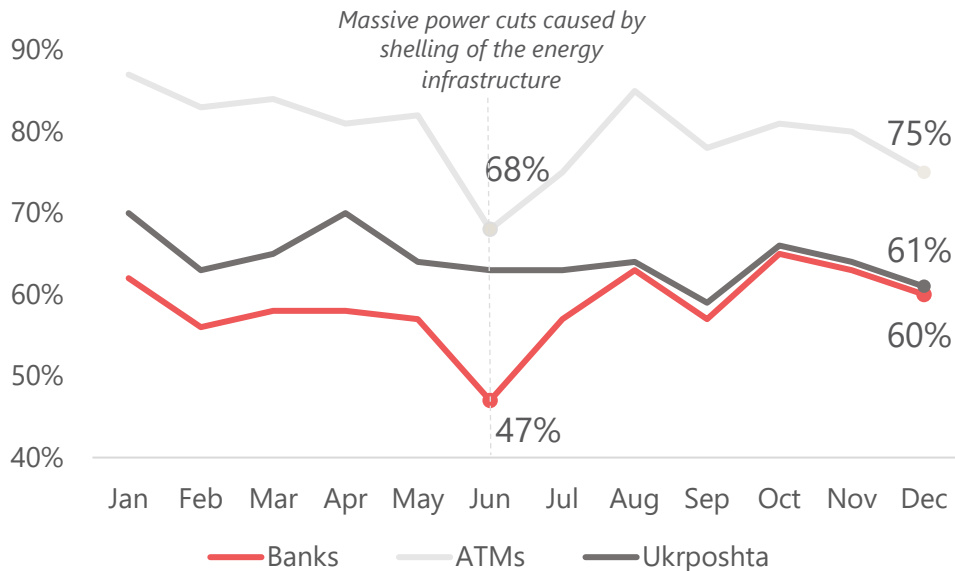


The annual upward trend was driven by a two- to threefold increase in the percentage of customer KIs in the East and South reporting active fighting or shelling, movement restrictions, and feelings of insecurity.

\* Respondents could select more than one option.

# Accessibility of financial services

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



Air alerts restricted the opening hours of bank branches (reported by 29% of customer KIs) and Ukrposhta offices (33%) across the country.

## Main barriers\* to accessing financial services, reported by customer KIs in December:

### Bank branches

#### Unavailable

50% Donetska  
17% Khersonska  
11% Mykolaivska

#### Accessible only nearby

36% Zaporizka  
33% Khersonska  
33% Kyivska

#### Power outages

10% Khersonska

### ATMs

#### No ATM

50% Donetska  
40% Zaporizka  
28% Mykolaivska

#### Limited number

33% Kyivska  
20% Kharkivska  
17% Mykolaivska

#### Power outages

56% Chernihivska  
35% Kyiv City  
30% Donetska

### Ukrposhta offices

#### Unavailable

20% Donetska

#### Irregular operation:

several days a week  
44% Zaporizka  
several days a month  
22% Mykolaivska

#### Power outages

27% Dnipropetrovka

\* Respondents could select more than one option.

A light gray world map is centered on the background. The map shows the outlines of continents and countries. Overlaid on the map is a red number '04'.

04

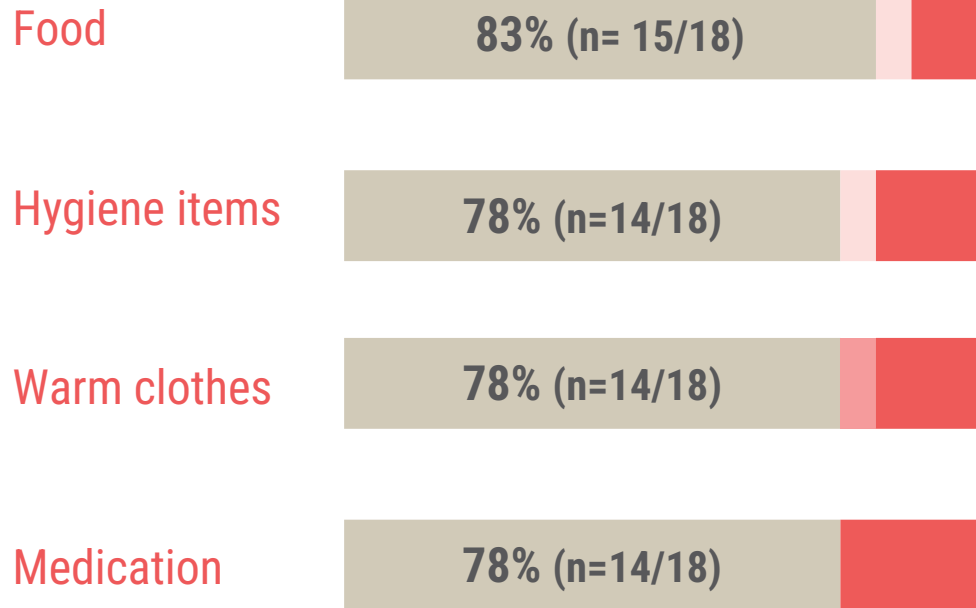
Focus on Mykolaivska Oblast



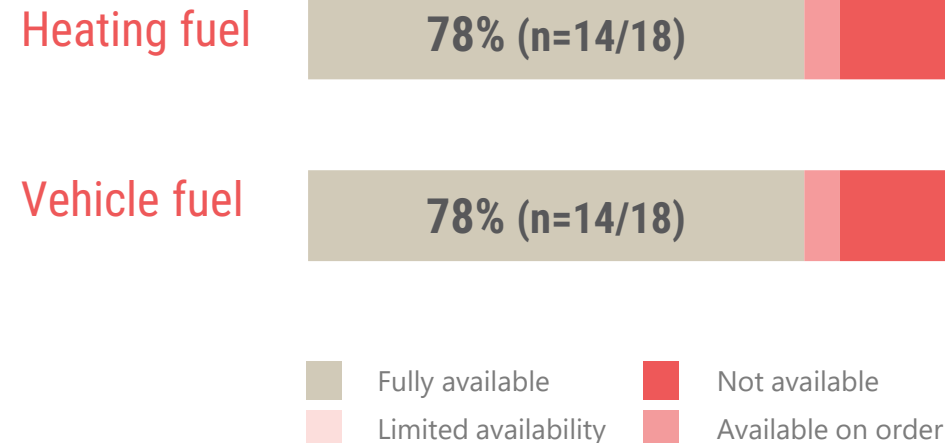
# Mykolaivska Oblast

## Availability of essential items and fuels

% of customer KIs reporting availability of essential items:



% of customer KIs reporting availability of fuels:



**Note.** On this slide, as well as on the following three, data is provided on Bereznehuvatska, Snihurivska, Mykolaivska, and Mishkovo-Pohorilivska hromadas in Mykolaivska oblast (N=18 for customers and N=8 for retailers).

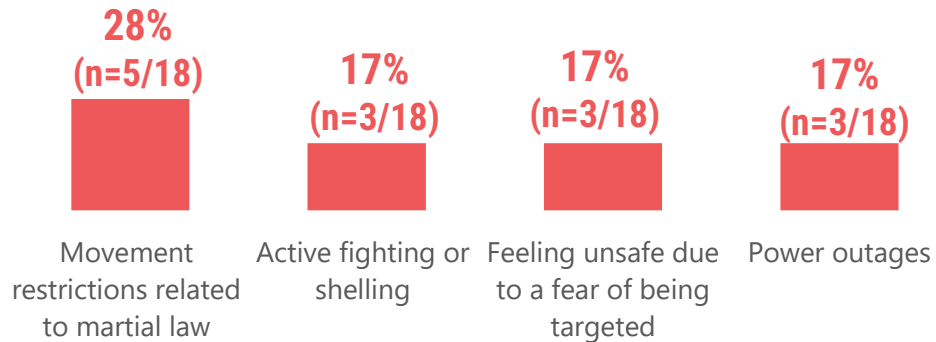
# Mykolaivska Oblast

## Accessibility of stores and affordability of goods in the stores

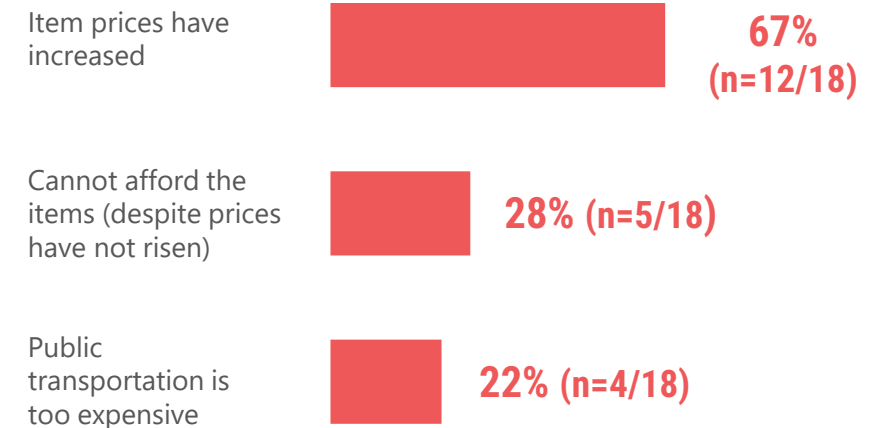
**50%**  
**(n=9/18)** of customer KIs reported that the full-scale war was affecting their ability to physically access stores or marketplaces

**78%**  
**(n=14/18)** of customer KIs reported financial-related challenges that impact their access to goods in the stores or markets

### Main physical barriers\* to accessing stores or marketplaces reported by customer KIs



### Main financial barriers\* to accessing goods in the stores reported by customer KIs

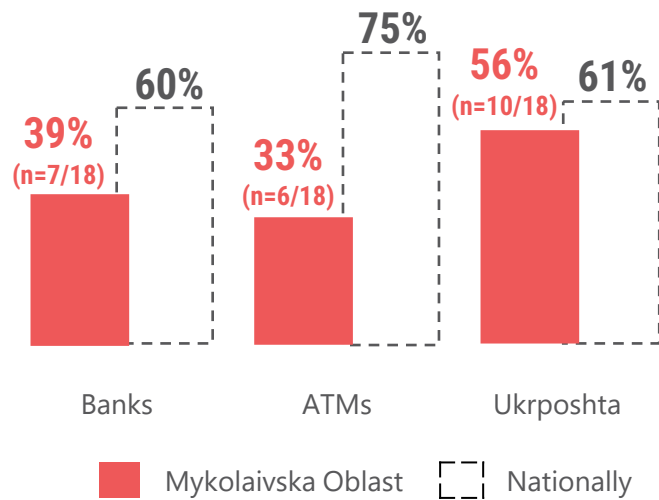


\* Respondents could select more than one option.

# Mykolaivska Oblast

## Accessibility of financial services

% of customer KIs reporting full availability of functioning financial services



Customer KIs in Mishkovo-Pohorilivska hromada (n=2/2) reported the unavailability of bank branches in their community, while customer KIs in Berezhnevatska hromada (n=5/6) reported the absence of ATMs.

Main barriers to accessing bank branches reported by customer KIs

- 1 Accessible only in nearby communities
- 2 Air alerts
- 3 Unavailable

Main barriers to accessing ATMs reported by customer KIs

- 1 No ATM in the community
- 2 Power outages
- 3 The number of functional ATMs is highly limited

# Mykolaivska Oblast

## Market functionality

**37%**  
**(n=3/8)** of retailer KIs reported difficulties in keeping their stores operational and well-stocked

### Main difficulties\* faced by retailer KIs in keeping their store operational and well-stocked

- 1 Storage of goods during the absence of electricity
- 2 Price increase charged by suppliers
- 3 Movement restrictions

**50%**  
**(n=4/8)** of retailer KIs anticipated new challenges in the coming months due to the war

### Main challenges\* retailer KIs expected to face in the coming months due to the war

- 1 Ricing prices
- 2 Reduced purchasing power of customers
- 3 Reduced mobility of customers

The estimated percentage of operating retailers compared to the pre-war level ranged between 50% and 75%.

Retailer KIs maintained a positive stock balance (the difference between median days of stock available and days required to restock). On average, they reportedly needed 1 to 2 days to resupply the items within the JMMI basket.

\* Respondents could select more than one option.

A light gray world map is centered in the background. Overlaid on the map is a complex, light gray geometric pattern consisting of numerous interconnected triangles of varying sizes, creating a mesh-like effect across the entire slide.

05

# Key takeaways for 2024

# Key takeaways for 2024

**Rising prices remained the main barrier to accessing goods available in stores for customers surveyed by JMMI, escalating from 59% at the start of the year to 70% by its end.** This issue also topped the list of challenges faced by retailer KIs.

**Annual inflation, after reaching its lowest levels in the spring, surged considerably toward the end of the year, reaching 12%. The most significant price increases were observed in electricity and basic food items,** including vegetables, butter, sunflower oil, milk, and bread.

**The escalation situation in the East, including the shift in the frontline, had a noticeable impact on the functioning of markets in this region:**

- the proportion of customer KIs reporting restricted access to markets rose sharply from 44% in January to 64% in December, driven by a 2–3 times increase in customers citing security-related factors such as active fighting and shelling, feeling unsafe, and restriction on movement;
- availability issues with essential items persisted throughout the year;
- affordability concerns intensified, with the proportion of customer KIs reporting financial barriers rising from 78% in January to 93% in December;
- retailers also faced heightened challenges, as the proportion reporting war-related difficulties increased from 38% to 65%.

**These findings highlight the heightened vulnerability of the population in the East, where meeting basic needs seems to have become increasingly challenging.**

# Thank you for your attention



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**IMPACT** Shaping practices  
Influencing policies  
Impacting lives  
REACH **PANDA** **AGORA**

**REACH** Informing  
more effective  
humanitarian action