

Introduction (About the JMMI)

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.

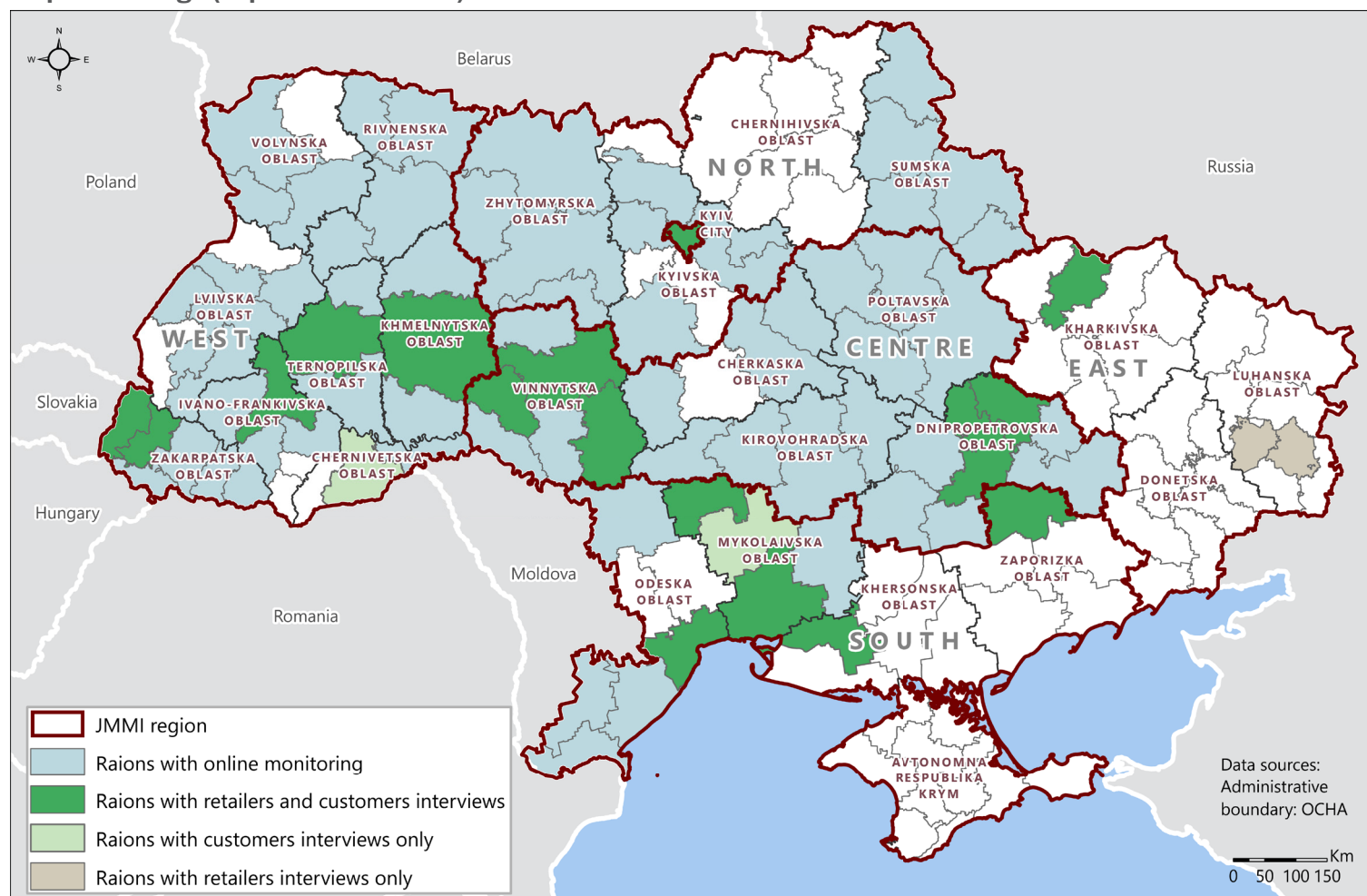
Marketplaces across Ukraine are assessed on a monthly basis. In each location, field teams record prices and other market indicators through retailer and customer interviews. In addition to the interviews, REACH conducts online price monitoring across the country. This factsheet presents an overview 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 figures

Total interviews conducted	429	Oblasts monitored	22	Cost of full JMMI basket, May 2022	730 UAH
Retailers	182			% change since previous round	▼ -9.1%
Customers	247	Hromadas monitored	213		
Participating partners	12	Face to face/phone	53	UAH/USD*	UAH/EUR*
		Online	160	34.60	36.20
				▲ +0.5%**	▲ +6.0%**

Areas covered

Map 1: Coverage (in-person and online)

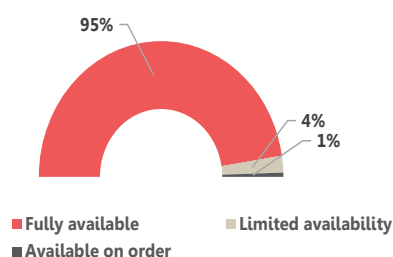


*Median exchange rate, purchase price, UAH per USD and UAH per EUR, 15 May 2022, "black" market. Data available at <http://minfin.com.ua>

**% change from previous round

Availability of items

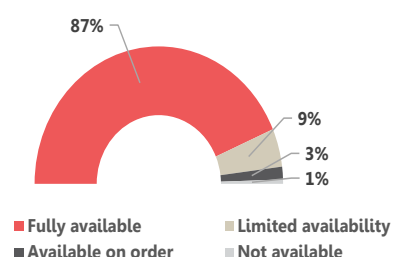
Graph 1: % of customers reporting availability, at the time of data collection, of food items, country-wide



In comparison to April, the reported availability of food items improved country-wide in May, with 7% more respondents reporting full availability. Limited availability and availability on order was reported less frequently, dropping from 12% in April to 5% in May round (graph 1).

Respondents in regions with occupied territories and ongoing ground hostilities more often reported limited availability and availability on order - 19% in the East and 7% in the South. Recently deoccupied regions in the North showed an increase in the availability of core food items (graph 19). Occupied oblasts in the South were reportedly starting to receive food items delivered from Crimea.

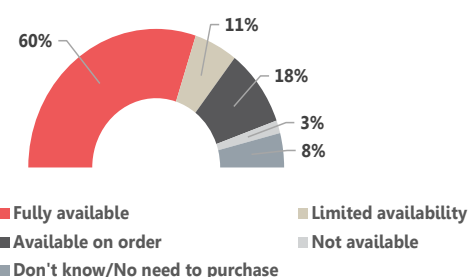
Graph 2: % of customers reporting availability, at the time of data collection, of hygiene items, country-wide



An 8% increase in the proportion of respondents reporting full availability of hygiene items was observed overall across the country compared to April. However, additional attention and more in-depth research may be required in the East and South regions, part of which are currently occupied and are increasingly cut-off from supply chains used before.

Twenty-five percent of respondents in the East and 13% in the South reported limited availability of hygiene items, with 2% of respondents in the South reporting that this group of items is unavailable in local shops and markets. Such reported limited availability correlates with higher monitored prices on basic hygiene items in the South and East regions compared to other locations in the country (map 2).

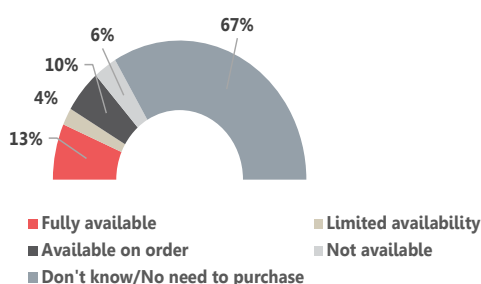
Graph 3: % of customers reporting availability, at the time of data collection, of medication, country-wide



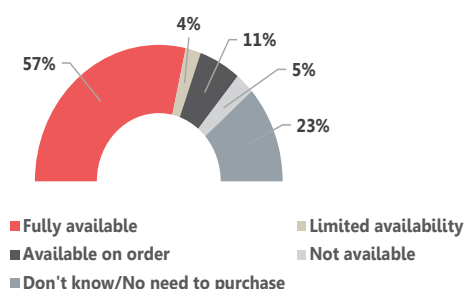
Country-wide, unavailability of medication is still an issue with only 60% reporting full availability. However, while 14% of respondents in April reported that medicine was not available and 4% available on order, in May these proportions have switched (graph 3).

In the South region, Khersonska oblast in particular is reportedly suffering from disruptions of supply of medication, with many pharmacies reportedly being closed down and cases of medication reportedly being sold openly on streets without required storing conditions and for prices up to 5 times higher than before the escalation in February.

Graph 4: % of customers reporting availability, at the time of data collection, of fuel (coal, firewood, other), country-wide



Graph 5: % of customers reporting availability, at the time of data collection, of warm clothes, country-wide



The JMMI Basket is a subset of the 296-item Minimum Expenditure Basket (MEB) maintained by the State Statistics Service of Ukraine, focusing only on core food and hygiene items that an average household must purchase on a regular basis. The JMMI Basket's contents were defined in consultation with the Ukraine Cash Working Group. Trends in this basket's cost over time are partly indicative of changes in the monthly financial burdens facing households in different areas.

Food items		Non-food items	
Bread	500 g	Diapers (infant, size 3, 4-9 kg)	1 small pack (40-60 pcs)
Eggs (chicken)	10 pcs	Body soap	1 bar (75 g)
Milk (2.5%, fresh)	0.9 L	Laundry soap	1 bar (200 g)
Potatoes	1 kg	Washing powder (automatic)	1 box (400 g)
Carrots	1 kg	Toothpaste	1 tube (75 mL)
Onions	1 kg	Hygiene/sanitary pads	1 pack (10 pcs)
Cabbage	1 kg		
Chicken (legs, fresh)	1 kg		
Oil (sunflower, refined)	0.9 L		
Wheat flour (white)	1 kg		
Rice (round)	1 kg		
Buckwheat	1 kg		
Complementary cereal for babies	200 g		
Drinking water	1 bottle (1.5 L)		

Region	Average number of days per year with fog
Kyiv	998.38
East	924.48
South	852.95
Centre	743.50
West	701.10
North	699.98
Overall	729.56

Map of Ukraine showing JMMI regions and baskets. The map is color-coded by JMMI region and includes a legend for JMMI NFI Basket, JMMI Food Basket, and Full JMMI Basket. The legend shows six categories for the Full JMMI Basket: 2689 - 2700 (lightest), 2701 - 2800, 2801 - 2900, 2901 - 21000, and > 21001 (darkest). The map also shows neighboring countries: Belarus, Poland, Russia, Slovakia, Hungary, Romania, and Moldova.

Item prices

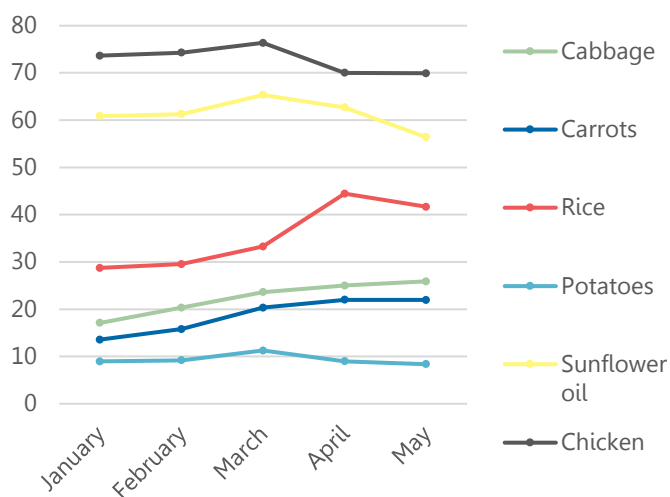
Table 1: Median prices of food items by region, UAH

Item	Unit	West		Centre		South		North		Kyiv		East		Overall	
		Median price	Change since April 2022	Median price	Change since April 2022	Median price	Change since April 2022	Median price	Change since April 2022*	Median price	Change since April 2022	Median price	Change since April 2022*	Median price	Change since April 2022
Bread	500 g	14.29	-13%	13.90	-21%	15.00	-12%	14.50	N/A	20.70	+8%	13.30	N/A	14.83	-13%
Eggs (chicken)	10 pcs	14.90	-28%	14.90	-35%	15.00	-39%	14.90	N/A	16.00	-39%	18.59	N/A	14.90	-35%
Milk (2.5%, fresh)	0.9 L	24.20	-14%	23.90	-18%	27.50	-17%	22.60	N/A	28.60	-8%	25.00	N/A	24.20	-19%
Potatoes	1 kg	8.39	+5%	4.95	-48%	9.90	-34%	5.95	N/A	8.89	-5%	15.00	N/A	8.39	-7%
Carrots	1 kg	21.95	+10%	21.95	-9%	24.95	+25%	21.95	N/A	22.85	+4%	30.00	N/A	21.95	0%
Onions	1 kg	17.95	-6%	17.95	-15%	18.73	-6%	17.95	N/A	16.90	-4%	20.00	N/A	17.95	-10%
Cabbage	1 kg	25.89	+6%	25.89	-8%	30.00	+20%	25.89	N/A	25.00	+9%	36.15	N/A	25.89	+4%
Chicken (legs, fresh)	1 kg	74.99	+7%	70.55	-16%	67.90	-2%	56.69	N/A	67.90	-17%	65.00	N/A	69.90	0%
Oil (sunflower, refined)	0.9 L	51.90	-9%	59.40	-9%	60.03	-12%	51.90	N/A	57.90	-1%	65.90	N/A	57.00	-9%
Wheat flour (white)	1 kg	17.60	-12%	16.90	-11%	20.50	-9%	17.60	N/A	19.44	+10%	19.09	N/A	17.60	-12%
Rice (round)	1 kg	41.65	-10%	44.44	+5%	45.90	+3%	41.65	N/A	47.67	-18%	52.60	N/A	41.65	-6%
Buckwheat	1 kg	66.90	0%	66.93	0%	80.80	+1%	65.30	N/A	72.43	+42%	72.89	N/A	70.90	+1%
Complementary cereal	200 g	73.50	N/A	112.94	N/A	95.00	N/A	N/A	N/A	104.00	N/A	61.08	N/A	93.00	N/A
Water	1 bottle (1.5 L)	11.90	+15%	10.20	+28%	11.10	-21%	10.20	N/A	11.90	-12%	12.33	N/A	11.60	+6%

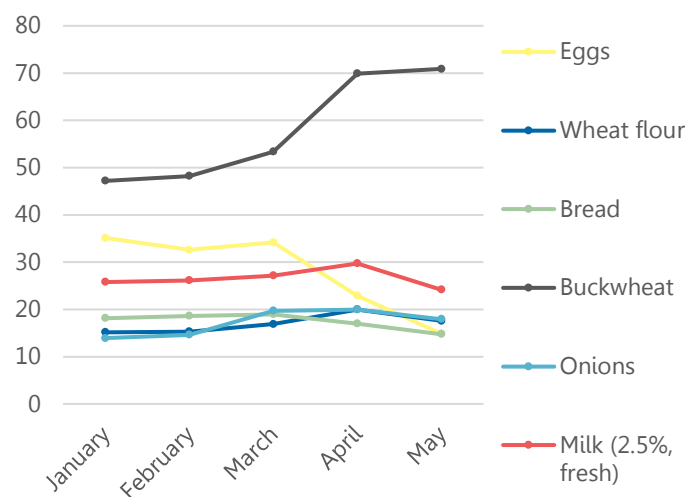
Table 2: Prices of non-food (hygiene) items by region, UAH

Item	Unit	West		Centre		South		North		Kyiv		East		Overall	
		Median price	Change since April 2022	Median price	Change since April 2022	Median price	Change since April 2022	Median price	Change since April 2022*	Median price	Change since April 2022	Median price	Change since April 2022*	Median price	Change since April 2022
Diapers (infant, 5-9 kg)	1 pack (40-60 pcs)	140.80	-42%	140.80	-46%	228.50	-18%	140.80	N/A	341.75	-19%	292.00	N/A	140.80	-46%
Body soap	1 bar (75 g)	6.00	-56%	6.40	-33%	8.45	-30%	6.10	N/A	15.92	-14%	10.38	N/A	6.70	-39%
Laundry soap	1 bar (200 g)	12.70	-2%	13.40	-20%	14.45	-10%	13.70	N/A	14.90	-29%	16.00	N/A	13.70	-9%
Washing powder	1 box (400 g)	29.40	+18%	29.70	+35%	29.00	-12%	30.00	N/A	30.75	-14%	32.06	N/A	29.90	8%
Toothpaste	1 tube (75 ml)	24.90	-34%	25.80	-1%	25.10	-9%	25.80	N/A	48.00	-29%	35.00	N/A	25.20	-21%
Hygiene/sanitary pads	1 pack (10 pcs)	21.30	-29%	22.60	-18%	25.15	-28%	23.50	N/A	26.90	-6%	32.12	N/A	23.50	-25%

Graph 7: Changes in price of key food items, UAH**



Graph 8: Changes in price of key food items, UAH

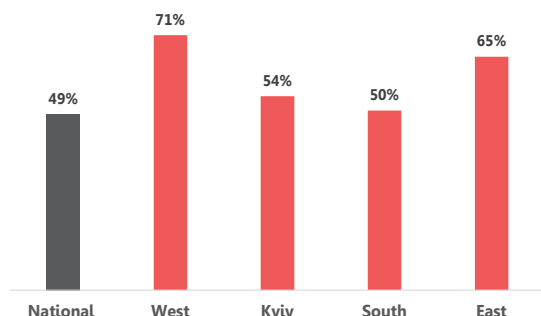


*N/A in Tables 1 and 2 stands for cases when price change since April 2022 JMMI Round is undefinable due to lack of this data in April 2022.

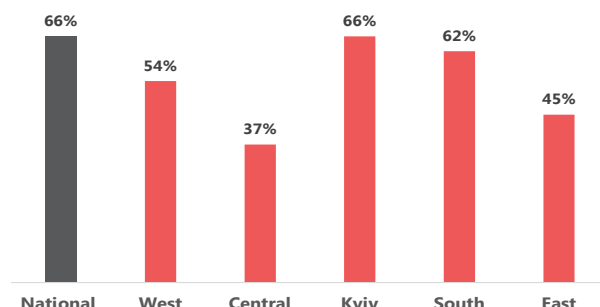
**The data include monthly average prices from the State Statistics Service of Ukraine and JMMI median prices as of May 2022.

Market functionality

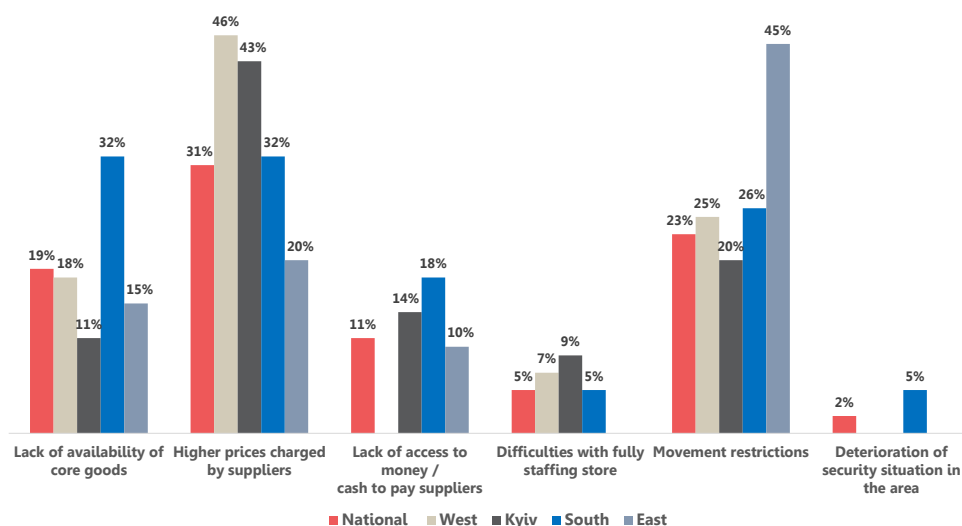
Graph 9: % of retailers reporting difficulties keeping store operational and well-stocked, by region



Graph 11: % of retailers reporting that they expect new challenges due to the crisis, by region



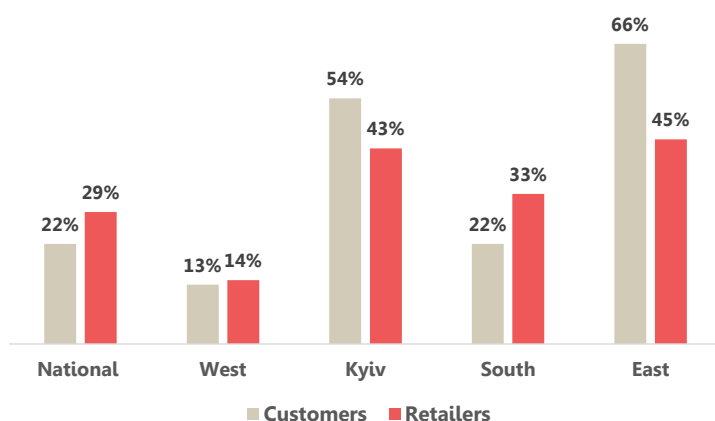
Graph 10: % of retailers reporting new challenges faced since the start of the crisis, by type of challenge and region



Compared to April, the proportion of retailers reporting having difficulties keeping their stores operational had almost doubled (graph 9) in the West. Higher prices charged by suppliers was the most often reported type of difficulty in almost every region (graph 10).

Market access

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



Both customers and retailers were asked about challenges customers face while accessing shops. Nationally, the proportion of retailers that reported their customers were facing challenges accessing shops was higher (29%) than that reported by customers (22%). In Kyiv and in the East customers reported having difficulties more often (graph 12).

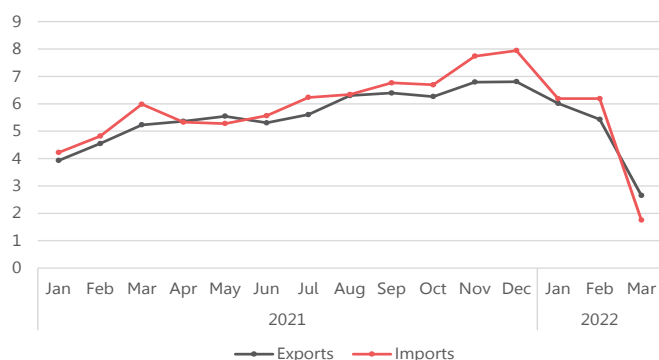
Most frequently reported access challenge for customers, among both retailers and customers were martial law / movement restrictions (reported by 20% of retailer and 15% of customer respondents) and transport limitations. A feeling of insecurity was reported less often than in April by both customers and retailers.

Macroeconomic trends

The escalation of the conflict in Ukraine has caused severe consequences for the Ukrainian economy. In April 2022, the World Bank forecast that the conflict would shrink Ukraine's economy by 45% and that losses may increase as the conflict progresses. By the middle of May the Ukrainian government had to lift certain emergency stabilisation measures in the market and finance system that had been taken in the wake of the escalation. Pegs on foreign exchange rates and the prices of fuel (petrol, diesel) were removed, allowing the prices of these items to float freely after continuous fuel shortages caused emergence of "non-official" fuel markets and Hryvnia continued devaliating at "black" markets.

Dynamics of international trade

Graph 13. Changes in gross value of exports and imports of Ukraine, bn USD*, January 2021 - March 2022

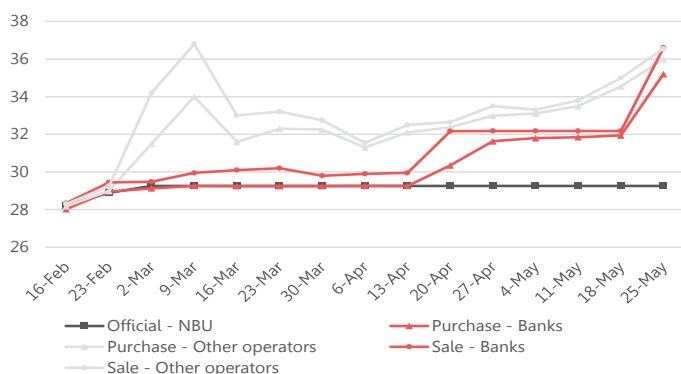


Active on-land military activities affected 10 out of 24 regions of Ukraine, including major urban and industrial centers like Kyiv, Kharkiv, and Mariupol, while regular air strikes targeted critical infrastructure across all of Ukraine, which along with the blockade of all Ukrainian seaports led to a steep decline in both imports and exports.

Kyiv city, Donetsk, and Mykolaivska oblasts, which handled 43% of Ukraine's exports and 49% of its imports as of January 2022, showed the highest rate of reduction in both their exports and imports for the 1st quarter of 2022.

Currency

Graph 14. Changes in USD exchange rates, January - May 2022**

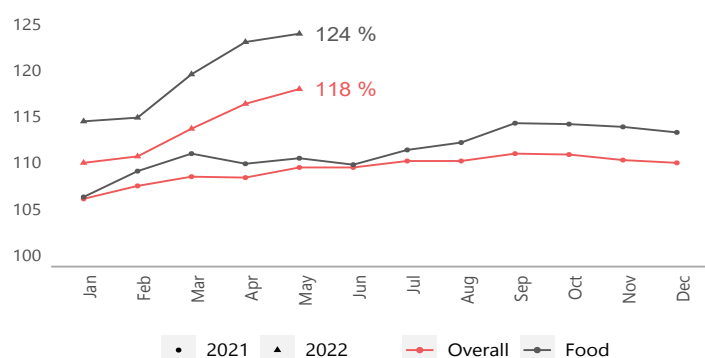


On February 24, 2022 the National Bank of Ukraine (NBU) fixed the official exchange rate and restricted the limits for other exchange market operators.

In April and May the NBU revised the limitations and on May 18, 2022 some limitations for currency exchange operations were lifted. In particular, while exchange rate for non-cash operations remained fixed, NBU has released* exchange rate for banks operations with cash operations. This made exchange rates for cash at banks and other operators better aligned (graph 14).

Inflation

Graph 15. Inflation rates,* year-on-year comparison, January 2021 - May 2022



Following a gradual rise throughout 2021, Ukraine's year-on-year inflation rate increased sharply starting in March and overall reached 118%.

Prices of food items, meanwhile, peaked in May 2022 at 124% of May 2021 prices. Vegetable prices showed the highest growth rate of 177%.

On average Ukrainian households spent 42.2% of their yearly monetary expenditures on food.

*For more details on the lift of limitations see NBU official release available via the [link](#).

**Based on data from the State Statistics Service of Ukraine

**The data include monthly average exchange rates from <http://www.minfin.com.ua>.

Trends of prices for selected (non-JMMI) items or services

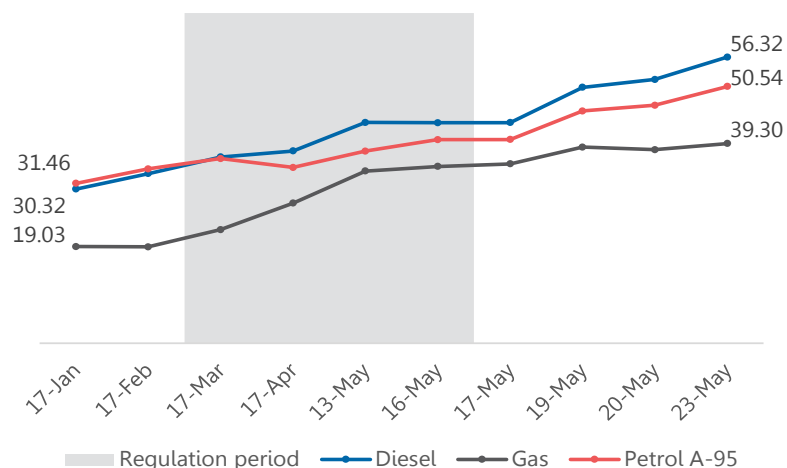
To step beyond some objective limitations of the JMMI methodology, it is important to consider price dynamics of other sectors of the market which directly or indirectly affect the households' consumption costs. On average, costs for transportation, medicine, and rent sum up to 10% of overall monetary expenditures of households in Ukraine.* In addition, prices and availability of medicine, fuel and housing are critical in the current situation of massive displacement.

Fuel

As of January 2022, 74% of the oil imported to Ukraine came from Russia (45%) and Belarus (30%). In addition, multiple oil depots across Ukraine and the largest Ukrainian oil refinery plant in Kremenchuk (Poltavska oblast) were damaged.

The Government of Ukraine (GoU) took measures to overcome the challenges of fuel supply to consumers. On March 17, 2022 the excise tax on fuel (petrol, diesel, compressed natural gas) was abolished and the VAT on imported petrol and diesel was decreased from 20% to 7%. At the same time, the GoU has imposed price restrictions on fuel, allowing market operators a limited margin**. However, by the middle of May Ukraine faced with an acute deficit of fuel. After the regulation was lifted on May 17 the prices for all types of fuel started increasing.

Graph 16. Changes in price of fuel***, January - May 2022, UAH



Rent

Massive waves of displacement caused fluctuations in rental prices in the key hosting regions of Ukraine, especially in the West of the country.

5 oblasts with highest rent for a 1-room apartment in April 2022, UAH per month

Kyiv	8,513
Chernihivska	6,889
Lvivska	6,720
Khmelnitska	5,410
Odeska	5,261

Medicine

5 oblasts with highest aggregated price of selected medicines**** in April 2022, UAH

Kyiv	1,403
Dnipropetrovska	1,267
Zaporizka	1,136
Cherkaska	1,081
Zakarpatska	1,062

5 oblasts with highest increases in medicine prices, December 2021-April 2022

Kyiv city	+16.2%
Kirovohradska	+14.5%
Sumska	+13.3%
Dnipropetrovska	+12.6%
Zaporizka	+11.8%

*Based on data from the State Statistics Service of Ukraine.

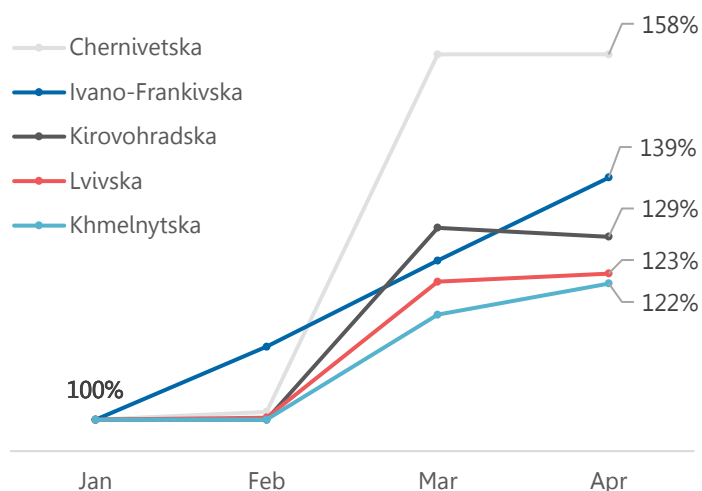
**In early May, the government raised the marginal levels of trade markup to the average retail price for diesel fuel sold at gas stations from UAH 5 to 7 per liter, gasoline from UAH 4.55 to UAH 6.5 per liter. More information available via the [link](#).

***The data include monthly average prices from the State Statistics Service of Ukraine and average national prices from www.minfin.com.ua.

****See the selected medicine and medical services in graph 18.

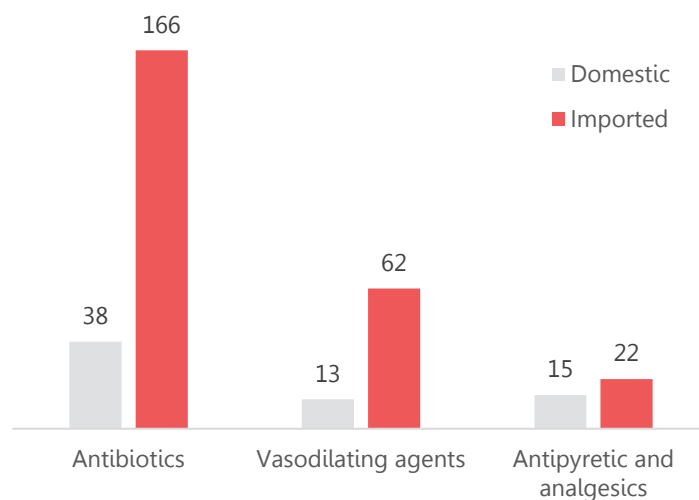
Rent

Graph 17. Top 5 oblasts by increase of rent for a 1-room apartment, % to January 2022, January - May 2022



Medicine

Graph 18. Average prices of the selected medicines in Ukraine, UAH

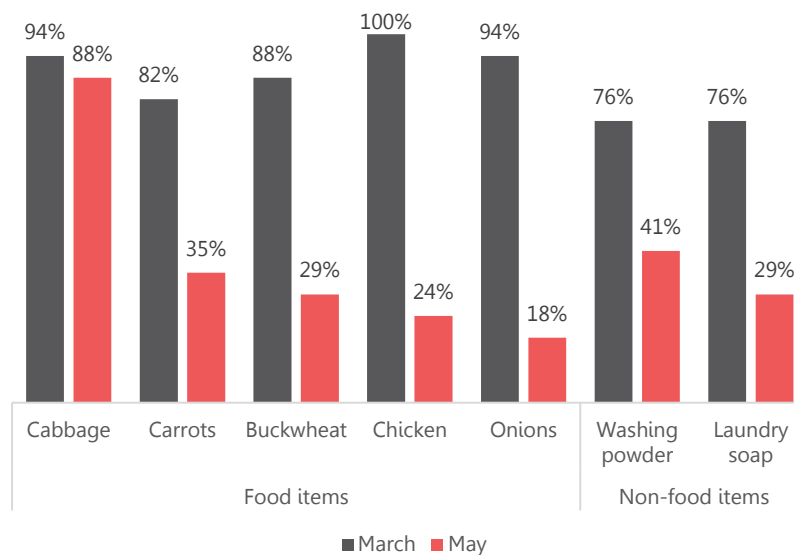


Sumska oblast

In March 2022, most JMMI items were reportedly widely unavailable in ATB supermarkets and the chain had to reduce its functionality in Sumska oblast by closing many stores in the area. After the Government of Ukraine restored control over Sumska oblast in early April, ATB gradually began to open its stores. By the end of May ATB relaunched its supermarkets in 12 major cities of Sumska oblast.

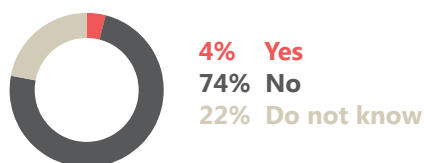
In May only 5 food items, namely cabbage, carrots, onions, buckwheat and chicken were found unavailable in some supermarkets across the Sumska oblast. Buckwheat, onions, and carrots were found available in Sumy, the oblast center, but unavailable in most of the other cities. Amongst non-food items, washing powder and laundry soap had scarce availability across Sumska oblast.

Graph 19. Proportion of shops with reported unavailability of items, % of the assessed shops, March and May 2022

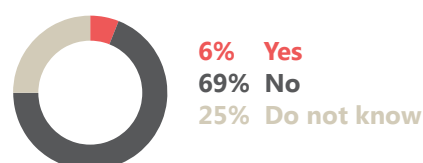


Suppliers

Graph 20: % of retailers reporting that they mostly rely on a single supplier for food items, country-wide

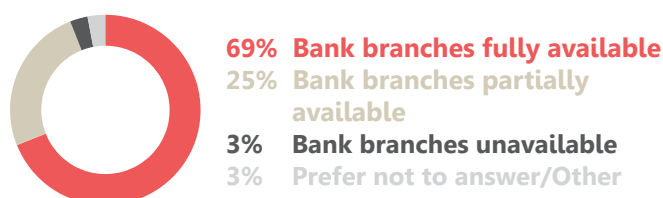


Graph 21: % of retailers reporting that they mostly rely on a single supplier for hygiene items, country-wide

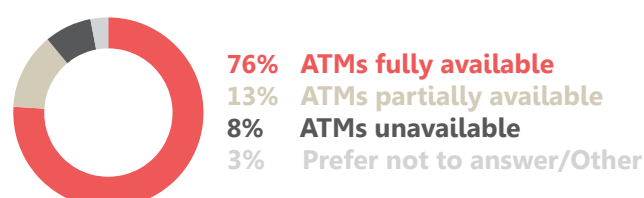


Financial services

Graph 22: % of retailers and customers reporting availability of bank services, country-wide



Graph 23: % of retailers and customers reporting functionality of ATMs in their area, country-wide



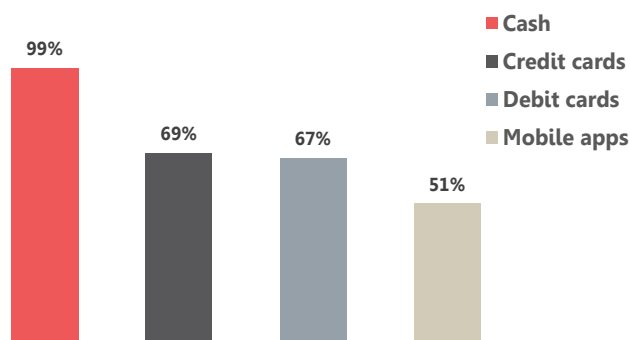
Graph 24: % of retailers and customers reporting on the functionality of Ukrposhta financial services in their area, country-wide



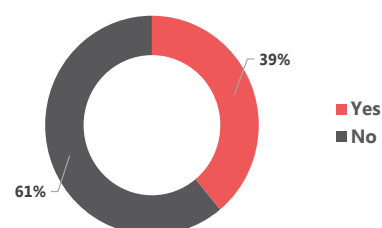
Nova Poshta, one of the largest private logistics operators in Ukraine with extensive coverage throughout the country in both urban and rural settlements, has introduced a service of cash withdrawal for people from debit or credit cards. Their network and cooperation with Western Union provides an additional way to deliver cash assistance to affected populations.

Payment modalities

Graph 25: % of retailers reporting that they accept different types of payment modalities, country-wide



Graph 26: % of retailers reporting that they allow cash withdrawal at in-store points of sale, country-wide



Methodology and context

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 highly 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, partnered 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 enumerators collect data on the

prices and availability of all JMMI items each month via the web portal of 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

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>.