

Ukraine | Joint Market Monitoring Initiative (JMMI) Nonsolid Heating 2023

MARKET OVERVIEW

Key Messages

- Kharkivska and Khersonska are identified as the two oblasts most vulnerable to winter-related risks in terms of costs and availability associated with nonsolid energy sources, as well as the availability of warm clothes. Donetska is also expected to be vulnerable to winter-related costs and availability, largely due to the reported reliance on and low availability of gas.
- Oblasts in the East have the highest overall percentage of petrol usage on average (47%). Donetska and Kharkivska oblasts are also expected to experience some of the highest petrol prices during the winter 2023 season (59 UAH), further raising the percentage of income needed to spend on petrol.
- Electricity costs have increased by an average of over 50% since December 2022, making it a more costly and less viable backup heating option for those who cannot access or afford gas or firewood.
- Dnipropetrovska, Kharkivska, Chernihivska, and Khersonska were the only four oblasts reporting less than 75% full availability of warm clothes, with Chernihivska and Khersonska specifically each reporting only 36% availability across the oblast.

Location	% reporting using petrol Aug 2023	Petrol price (UAH) Aug 2023	Winter 2023 Petrol price (UAH) Projection	% reporting using gas for heating Aug 2023	Gas for Heating Price (UAH) Aug 2023	Electricity for Heating Price (UAH) Aug 2023	% reporting fuel for heating being fully Available Aug 2023	% reporting warm clothes being fully Available Aug 2023
Center								
Cherkaska	20%	45	50	44%	8	2.6	100%	100%
Dnipropetrovska	24%	51.99	57	37%	8	2.64	68%	73%
Kirovohradska	23%	53	58	37%	7.95	2.64	90%	100%
Poltavska	35%	50	55	81%	7.98	2.64	88%	100%
Vinnyska	38%	48	53	98%	7.9	2.75	100%	88%
East								
Donetska	50%	53.99	59	40%	7.96	2.6	80%	100%
Kharkivska	44%	54	59	35%	7.99	2.64	60%	63%
North								
Chernihivska	24%	53	58	n/a	n/a	n/a	n/a	36%
Kyivska	30%	50	55	55%	8	n/a	70%	100%
Kyiv City	20%	55	60	n/a	n/a	n/a	66%	100%
Sumska	40%	52	57	80%	7.96	n/a	100%	100%
Zhytomyrska	50%	52.99	58	60%	8	2.64	97%	100%
South								
Khersonska	20%	53	58	18%	7.96	2.64	61%	36%
Mykolaivska	28%	52	57	31%	8	2.64	100%	100%
Odeska	50%	50	55	50%	7.95	2.45	92%	96%
Zaporizka	33%	49	54	27%	8	n/a	100%	93%
West								
Chernivetska	64%	54	59	80%	8	2.64	100%	100%
Ivano-Frankivska	17%	52	57	88%	7.9	2.5	93%	76%
Khmelnyska	25%	52	57	75%	8	2.64	90%	100%
Lvivska	32%	51	56	80%	8	2.6	100%	96%
Rivnenska	28%	55	60	11%	8	2.65	100%	78%
Ternopilska	45%	56	61	95%	8	2.64	100%	95%
Volynska	20%	52	57	40%	8	n/a	100%	100%
Zakarpatska	45%	52	57	75%	7.99	2.64	95%	75%

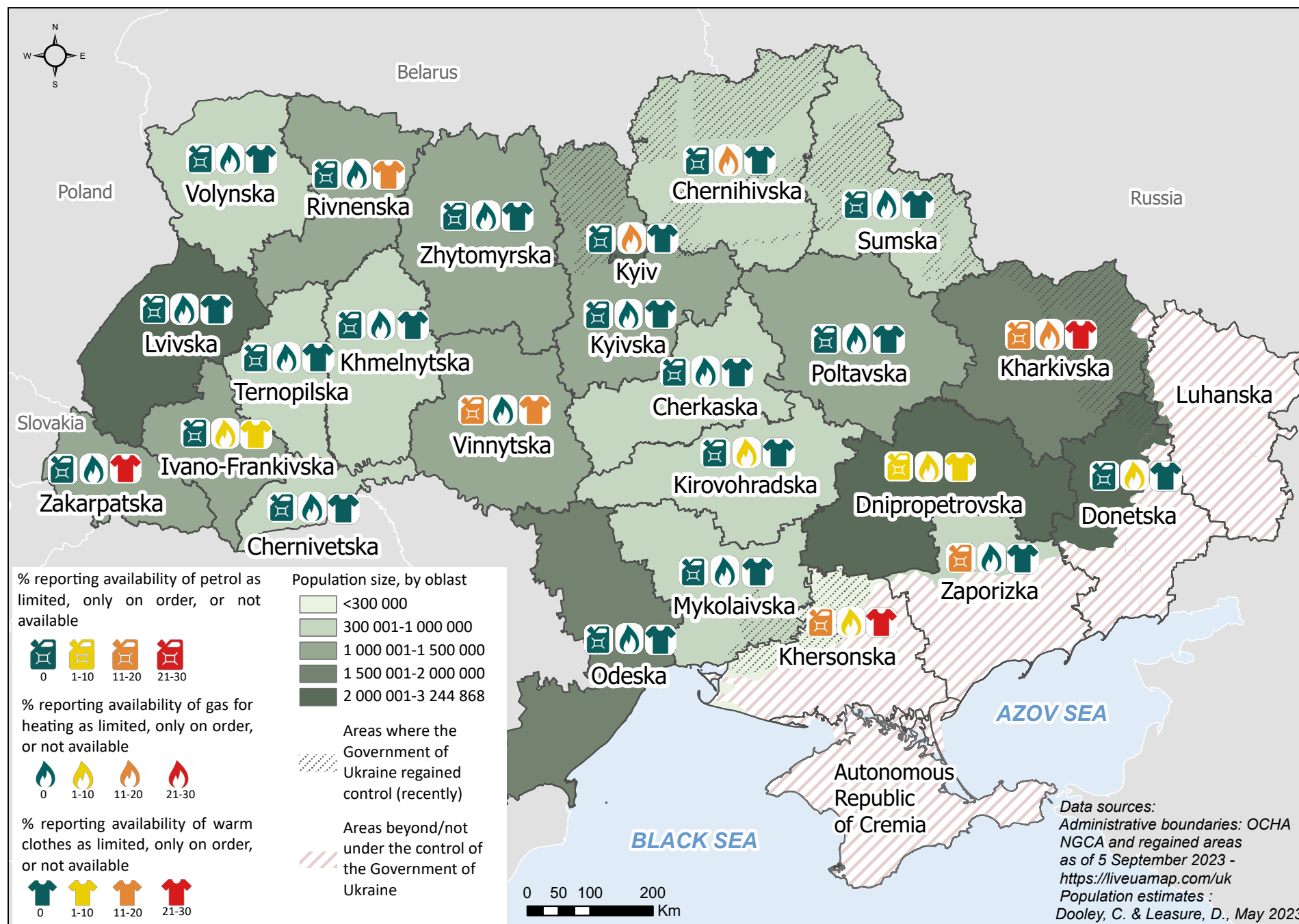
- Considering the findings of the **REACH Cold Spot Risk Assessment Winterization 2023/24 study**, available [here](#), the rayons identified as the most vulnerable, exhibiting both a high Cold Spot Index and increased susceptibility to winter-related non-solid heating costs and unavailability, include Kharkivskiy and Chuhuivskiy rayons in Kharkivska oblast, as well as Kramatorskiy, Bakhmutskiy, and Pokrovskiy rayons in Donetska oblast.

Market overview is based on 562 customer key informant interviews collected by the Joint Market Monitoring Initiative (JMMI) in August 2023. (the data is available [here](#)).

The table shows the percentage of customers reporting full availability of each type of good.

Projections on the price of petrol for heating are based on forecasts from Ukrainian fuel market experts (the source is available [here](#)). Electricity and gas for heating are expected to remain consistent due to government price regulation.

Map 1: Availability of nonsolid heating sources and warm clothes (%) in August 2023, by oblast



The map shows the percentage reporting the availability of petrol for heating, gas for heating, and warm clothes as limited, only being available on order, or not being available.