



# Joint Market Monitoring Initiative (JMMI) February 2025

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 on the page, overlaid with a low-poly geometric pattern of thin gray lines. The map shows the continents of North America, South America, Europe, Africa, Asia, and Australia. The text '01' is positioned above the word 'Methodology' in the center of the map.

**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 February 2025



10 Participating partners

19 Assessed *oblasts*

73 Assessed *hromadas*

654 Key informant interviews (KIIs)

398 customers surveyed



256 retailers surveyed

20 Commodities assessed

# Donors

**HAVEN**

Humanitarian Action  
through Volunteers,  
Enablers & Networks

Nonviolent **Peaceforce**

**acted**

Geneva Call  
Appel de Genève

Supported by:

**UKaid**  
from the British people

**Relief  
Coordination  
Centre**  
• EVERYONE MATTERS •

**IMPACT** Shaping practices  
influencing policies  
impacting lives  
**REACH PANDA AGORA**

**CENTER FOR  
CIVILIANS IN CONFLICT**  
RECOGNIZE. PREVENT. PROTECT. AMEND.

# Partners

**MERCY  
CORPS**

**INTERNATIONAL  
RESCUE  
COMMITTEE**

**KAPITAC  
УКРАЇНИ**  
**CARITAS  
UKRAINE**

**ADRA**

**acted**

**ACTION  
AGAINST  
HUNGER**

**CORE**  
Community Organized Relief Effort

**REACH** Informing  
more effective  
humanitarian action

**AQILITY**

**People  
in Need**

**Save the  
Children**

A light gray world map is centered on the page, 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 '02' is positioned above the title 'Key findings' in the center of the map.

02

# Key findings

# Key findings

**In February, 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.** 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 13% in February,** driven largely by continued increases in food prices and production costs including labor costs.

The median cost of the full JMMI basket rose by 23% over the year. **The food component of the JMMI basket experienced the sharpest price increases, rising by 25%.**

**Nationwide, rising prices have severely impacted access to goods,** with 66% of customer KIs citing higher prices as their primary financial barrier. **The elderly population was particularly affected,** with 85% of customer KIs aged 60 and above reporting that they could not afford essential items available in stores.

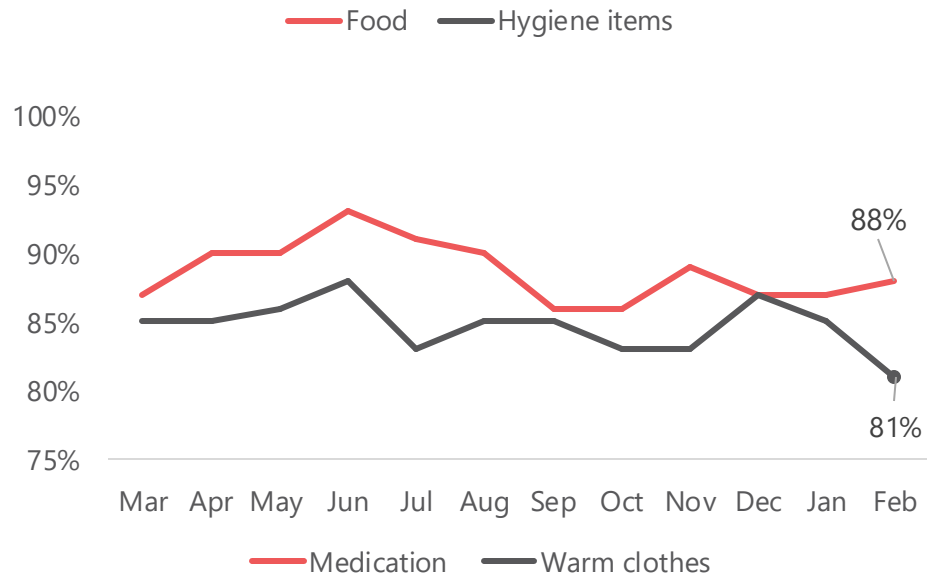
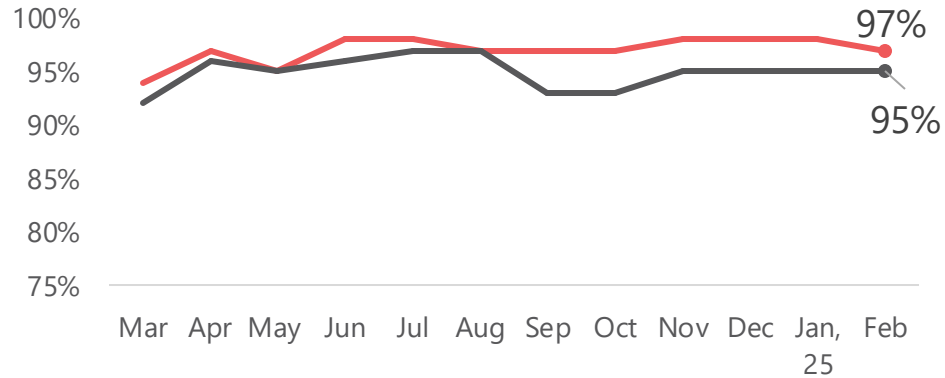
A light gray world map is centered on the slide, overlaid with a faint, light gray geometric pattern of interconnected triangles. The map shows the continents of North America, South America, Europe, Africa, Asia, and Australia. The number '03' is positioned above the main title.

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 February

	Food items	Hygiene items	Warm clothes	Medication
East	0%	3%	15%	10%
South	12%	19%	41%	19%
National	3%	5%	16%	5%

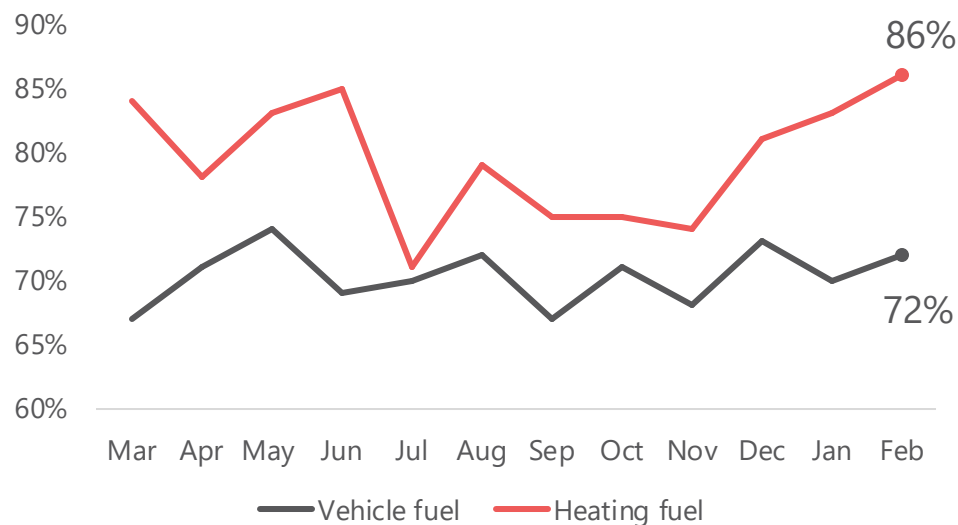
\* This option includes the responses "not available", "limited availability", and "available on order".

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

<b>Food items</b> Orikhivska ( <b>Zaporizka</b> ) Berezhnevatska ( <b>Mykolaivska</b> ) Vysokopilska ( <b>Khersonska</b> )	<b>Hygiene items</b> Orikhivska ( <b>Zaporizka</b> ) Berezhnevatska ( <b>Mykolaivska</b> ) Snihurivska ( <b>Mykolaivska</b> ) Vysokopilska ( <b>Khersonska</b> )
<b>Warm clothes</b> Orikhivska ( <b>Zaporizka</b> ) Stepnenska ( <b>Zaporizka</b> ) Pishchanska ( <b>Dnipropetrovaska</b> ) Mykolaivska ( <b>Mykolaivska</b> ) Snihurivska ( <b>Mykolaivska</b> ) Vysokopilska ( <b>Khersonska</b> )	<b>Medication</b> Orikhivska ( <b>Zaporizka</b> ) Novovorontsovka ( <b>Khersonska</b> )

# Availability of fuels

% of customer KIs reporting full availability of fuels, national level



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

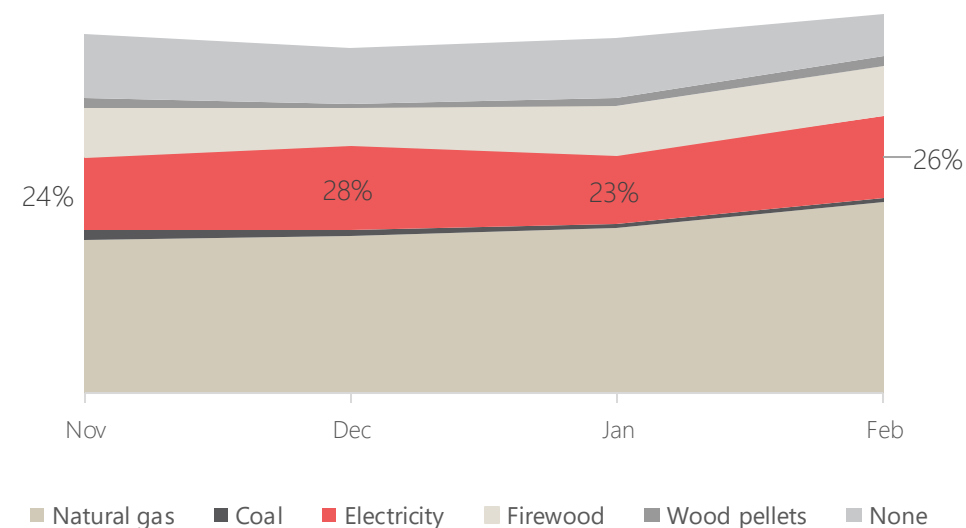
## Heating fuel

Orikhivska (**Zaporizka**)  
Berezhnevatska (**Mykolaivska**)  
Vysokopil'ska (**Khersonska**)

## Vehicle fuel

Pishchanska (**Dnipropetrovska**)  
Borozenska (**Khersonska**)  
Novovorontsov'ska (**Khersonska**)  
Vysokopil'ska (**Khersonska**)

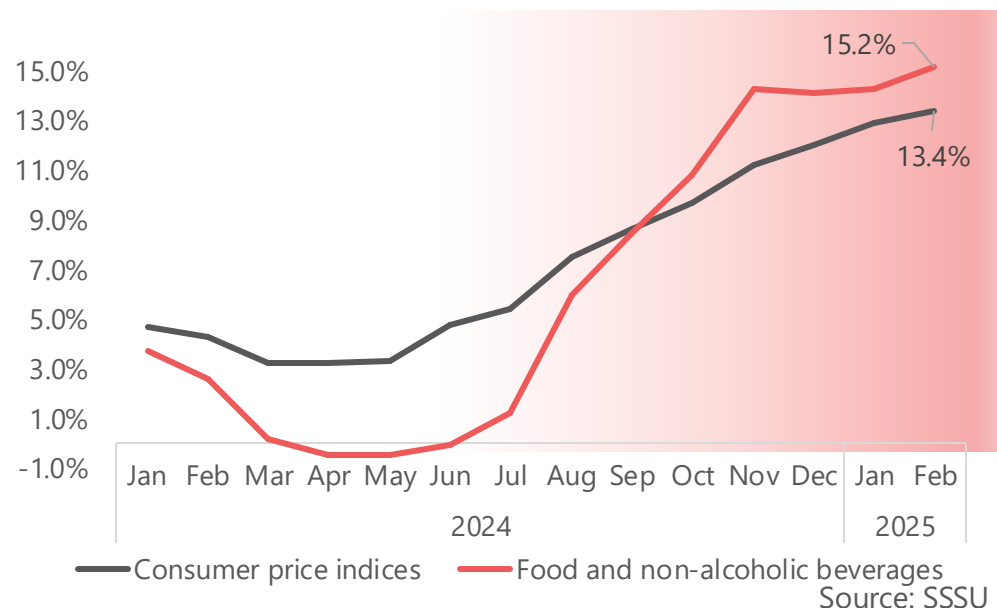
% of customer KIs reporting they regularly purchased electricity for heating purposes\* in February, nationally



\* Respondents could select more than one option.

# Prices

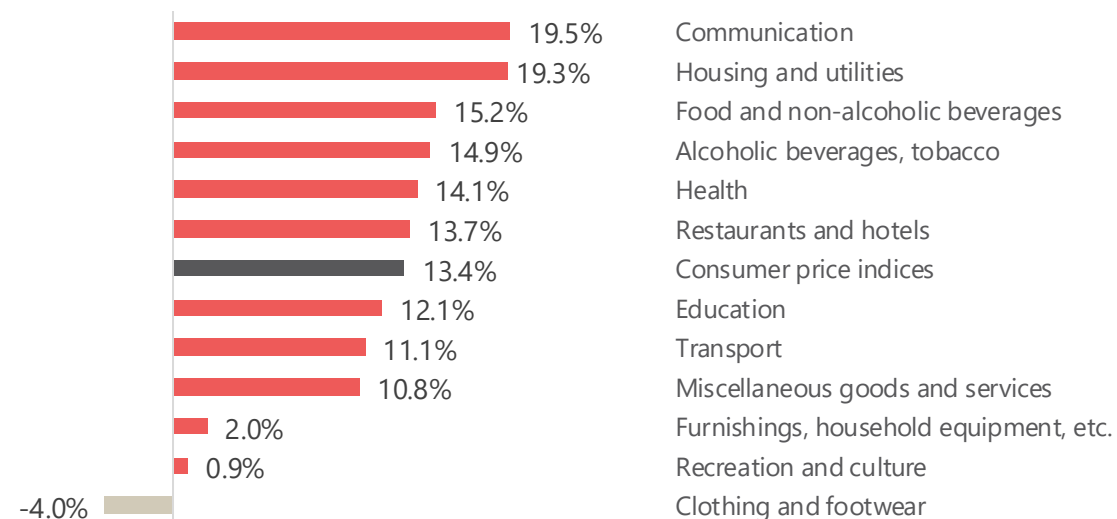
## Annual inflation rate\*, %



**Electricity, butter, edible oil and vegetable prices increased the most annually (by 63.6%, 32.2%, 31.1% and 29.4% respectively).**

*In January 2025, both headline inflation and core inflation accelerated (to 12.9% yoy and 11.7% yoy, respectively, from 12.0% yoy and 11.3% yoy in December). These trends reflected the impact of both temporary factors, such as a limited supply of food products due to last year's lower harvest, and fundamental factors, such as further increases in production costs, including for labor. According to the NBU's estimates, inflation continued to increase in February\*\**

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



Source: SSSU

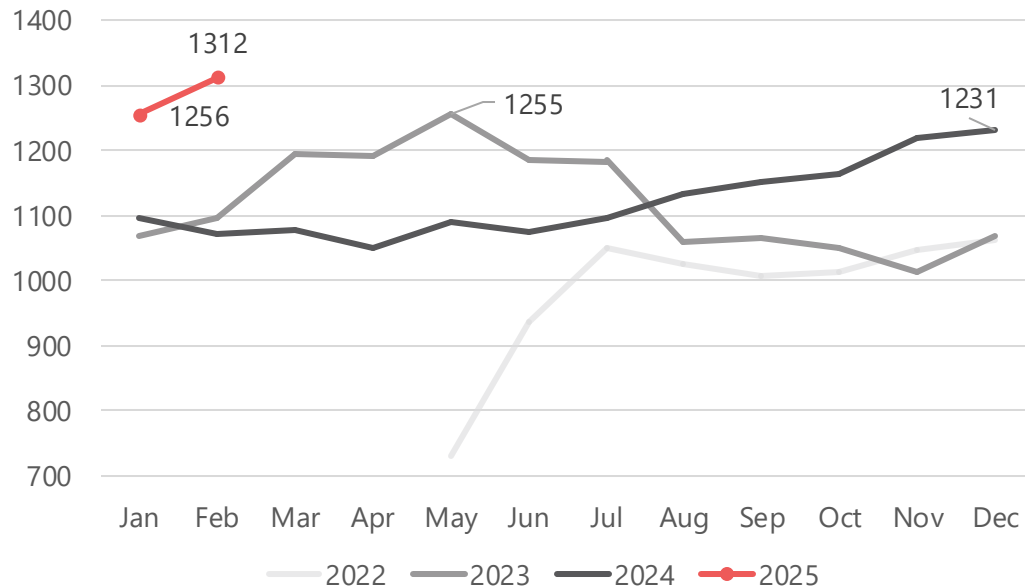
Monthly inflation\* eased to 0.7% in February compared to 1.2% in January. Prices for food and non-alcoholic beverages increased by 1.2% in February.

\* 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 Marh 2025.

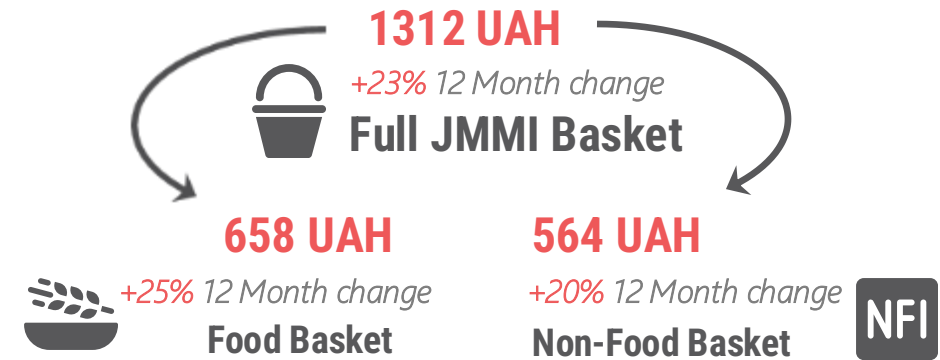
# Prices for items in the JMMI basket

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

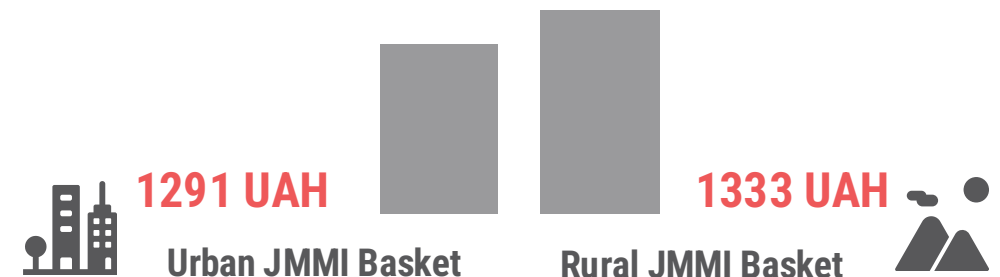


In February 2025, the highest cost of the full JMMI basket was observed in Kyiv (1450 UAH) and in the South (1410)

JMMI basket in February

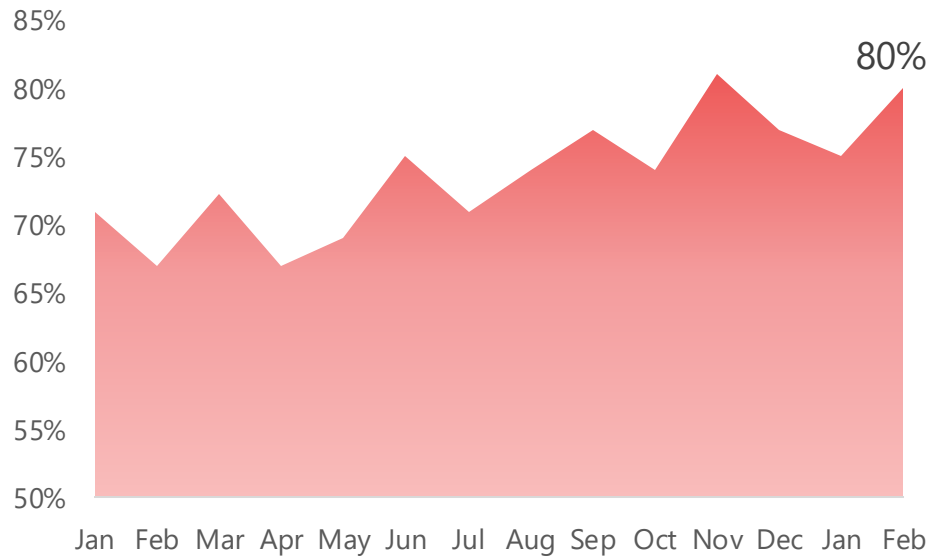


JMMI basket in February, by type of area



# Affordability

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



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

% of customers KIs reporting that financial factors\* affected their access to goods in stores or marketplaces in February, 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%	81%	74%	64%	89%	60%
Fuel for vehicle is too expensive	29%	16%	19%	34%	29%	23%
Public transportation is too expensive	13%	19%	15%	13%	11%	21%
Cannot afford the items (despite prices have not risen)	12%	8%	12%	12%	14%	9%
Items are not available	3%	4%	3%	1%	3%	2%
Do not have enough physical cash	2%	3%	4%	3%	5%	3%

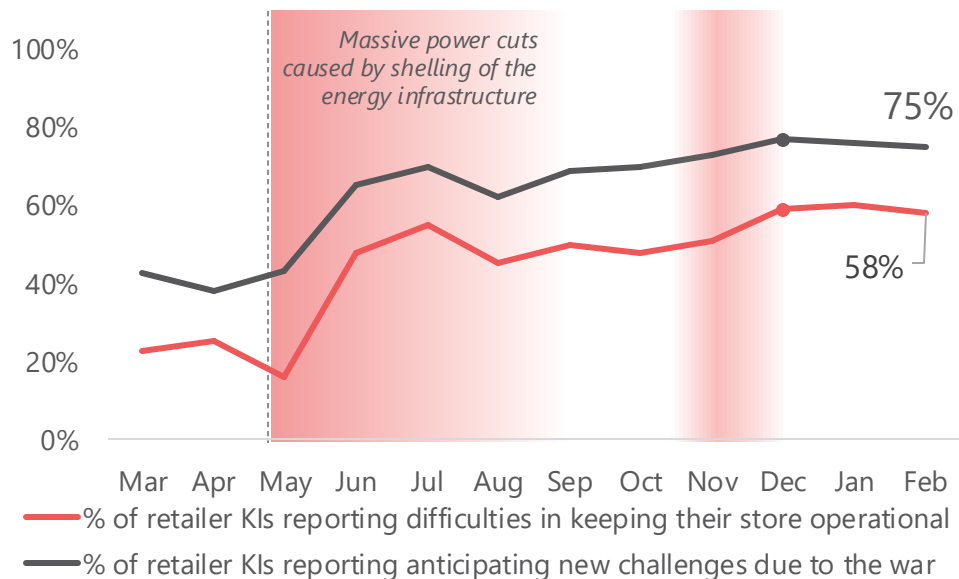


In the South 81% customer KIs reported that price increase as the main financial barrier to accessing goods

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

- 1 **27%** Fully staffing the store *The highest value of the indicator was in the West (43%)*
- 2 **27%** Movement restrictions
- 3 **25%** Price increase charged by suppliers

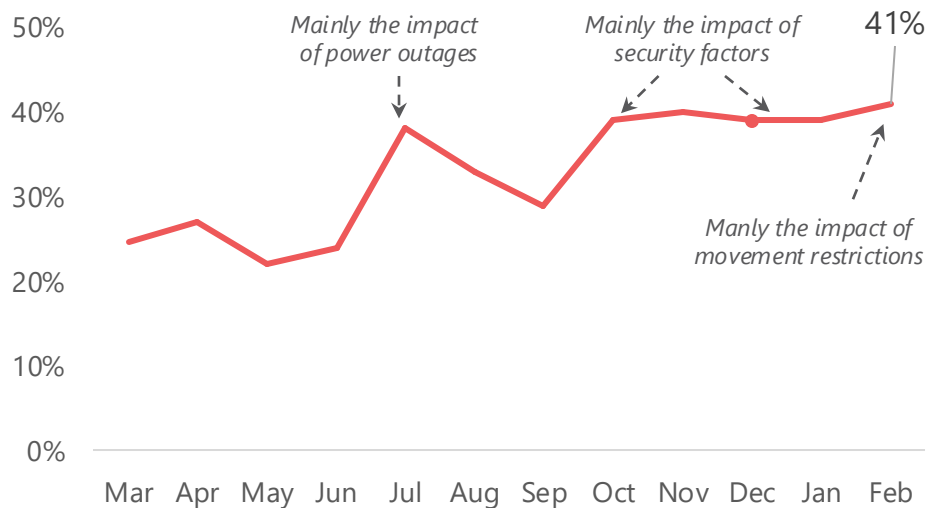
Top 2 challenges\* retailer KIs expected to face in the coming months due to the war in February

- 1 **62%** Rising prices *The highest value of the indicator was in the East (72%)*
- 2 **39%** 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 February



**Active fighting or shelling**  
**40%** Khersonska  
**30%** Zaporizka



**Feeling unsafe due to fear of being targeted**  
**60%** Khersonska  
**40%** Chernihivska  
**39%** Donetska



**Movement restrictions**  
**80%** Khersonska  
**70%** Chernihivska



**Buildings or infrastructure have been damaged**  
**40%** Khersonska  
**30%** Zaporizka



**Damage or blockages on roads**  
**28%** Mykolaivska  
**20%** Zaporizka



**Lack of transportation**  
**27%** Khersonska  
**22%** Donetska



**Power outages**  
**31%** Odeska  
**22%** Donetska



**Air alerts**  
**29%** Kyiv  
**28%** Odeska

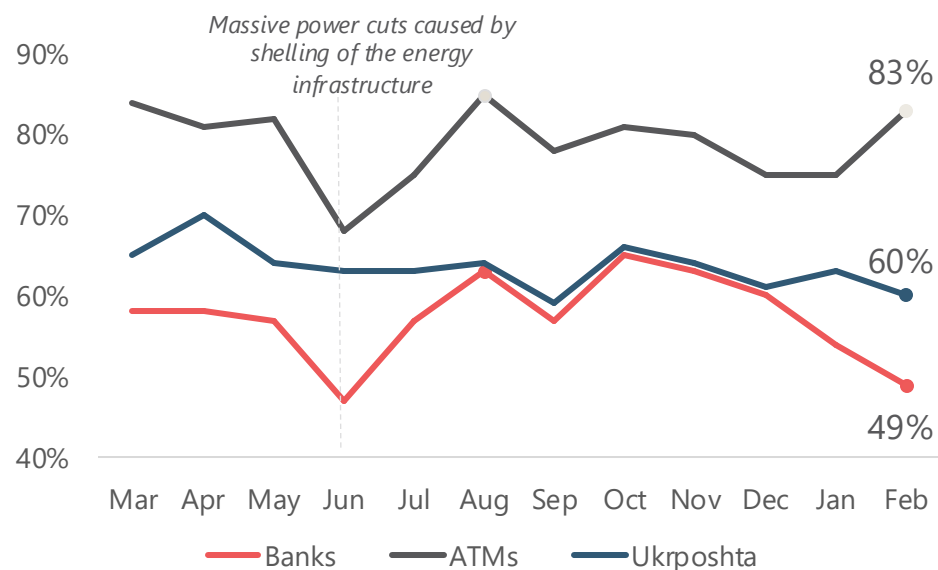


The annual upward trend was driven by a two- to threefold increase in the percentage of customer KIs in the East and South reporting active fighting or shelling, movement restrictions, and feelings of insecurity.

\* 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 34% of customer KIs) and Ukrposhta offices (25%) across the country.

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

### Bank branches

#### Unavailable

53% Khersonska  
29% Zaporizka  
28% Mykolaivska

#### Accessible only nearby

43% Kharkivska  
43% Zaporizka  
33% Khersonska

#### Power outages

33% Kyivska  
25% Donetsk

### ATMs

#### No ATM

71% Zaporizka  
53% Khersonska  
33% Mykolaivska

#### Limited number

17% Odeska  
13% Khersonska  
13% Kharkivska

#### Power outages

14% Dnipropetrovska  
10% Donetsk

### Ukrposhta offices

#### Unavailable

11% Mykolaivska  
10% Zaporizka

#### Irregular operation: several days a week

33% Khersonska  
29% Zaporizka  
28% Mykolaivska

#### Power outages

25% Donetsk

\* Respondents could select more than one option.

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03

# MEB WASH items` prices comparison

# WASH MEB items

Item (Eng)	Unit	Price (national), UAH Feb 2025	Price (national), UAH Jul 2023	Change, %
Drinking water	1.5 L	17,00	16,75	1,47%
Toothbrush	1 pc	23,07	25,15	-8,26%
Toothpaste	1 tube (75 ml)	45,09	36,99	21,89%
Body soap	1 bar (75 g)	14,12	13,84	2,01%
Laundry soap	1 bar (200 g)	21,16	21,90	-3,39%
Shampoo	200 ml	33,84	34,24	-1,17%
Razor (men)	1 set of 2 individual blade pieces	24,51	29,58	-17,15%
Shaving foam (men)	1 pc (200 ml)	83,85	82,04	2,21%
Razor (women)	1 set of 2 individual blade pieces	45,12	40,59	11,16%
Shaving cream (women)	1 pc (200 ml)	136,38	115,88	17,69%
Hygiene/sanitary pads	1 pack (10 pcs)	47,30	41,58	13,75%
Body cream	250 ml	129,49	111,13	16,52%
Toilet Paper	6 rolls	69,47	60,17	15,45%
Deodorant (neutral)	200 ml	202,49	149,41	35,53%
Washing powder (automatic)	1 box (500 g)	53,98	47,05	14,74%
Dishwashing / Washing-up liquid	500 ml	34,80	31,35	11,00%
Sponge for dish washing	1 pc	4,04	4,85	-16,63%
General Household Bleach	1000 ml	25,02	24,28	3,04%
Total		1010,71	886,78	13,98%

# Thank you for your attention



[ievgen.volkovskyi@reach-initiative.org](mailto:ievgen.volkovskyi@reach-initiative.org)



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Influencing policies  
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