



Joint Market Monitoring Initiative (JMMI) September 2024

REACH Ukraine



Contents

- 01** Methodology
- 02** Key findings
- 03** Market overview
- 04** Focus on Donetska oblast

A world map is centered in the background, rendered in a light gray color. Overlaid on the map is a complex geometric pattern of thin, light gray lines forming a network of irregular polygons, resembling a low-poly mesh or a network diagram. The overall aesthetic is clean and modern.

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 September 2024



13 Participating partners

19 Assessed *oblasts*

106 Assessed *hromadas*

933 Key informant interviews (KIIs)

556 customers surveyed



377 retailers surveyed

20 Commodities assessed

Partners



Donors





02

Key findings

Key findings

In September, with the energy situation stabilizing, local markets were functioning reliably and effectively supplied basic needs on a national scale. However, **the situation appeared to be different in areas close to the frontline, particularly in Donetska oblast, which faced significant concerns regarding the accessibility of stores and financial services, as well as the availability of essential items.** The September JMMI analysis highlights that access to goods, markets, and cash was especially challenging for customer KIs in Marinska hromada of Donetska oblast.

Inflationary pressures intensified more than expected, with the annual inflation rate rising to 8.6%, the highest this year. Increases in electricity and vegetable prices contributed the most. JMMI analysis indicates that high prices for goods were reported as a primary financial barrier for 77% of customer KIs. **Affordability remained a critical nationwide issue, especially impacting the elderly.**

The median value of the JMMI basket was 8% higher than in September of the previous year. The most expensive JMMI basket was calculated based on prices reported in Kyiv (UAH 1,261), followed by the East (UAH 1,195) and North (UAH 1,193). At hromada level, the highest cost of the JMMI basket was recorded in Chernihivska hromada of Chernihivska oblast (UAH 1,496).

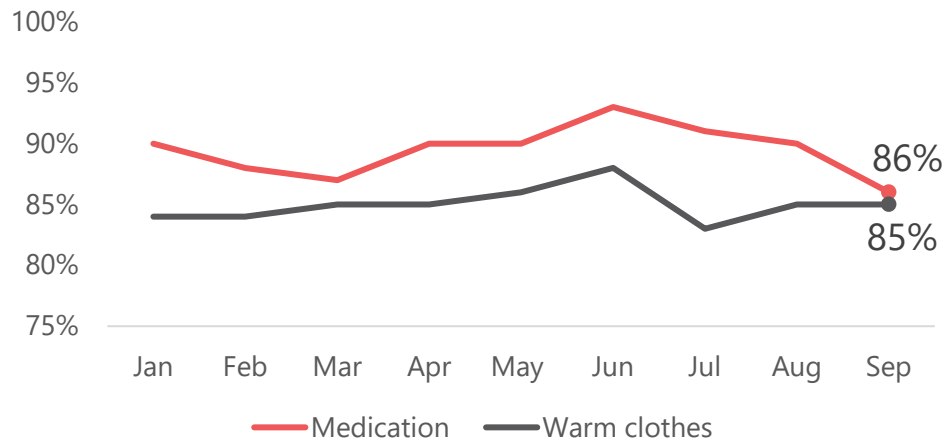
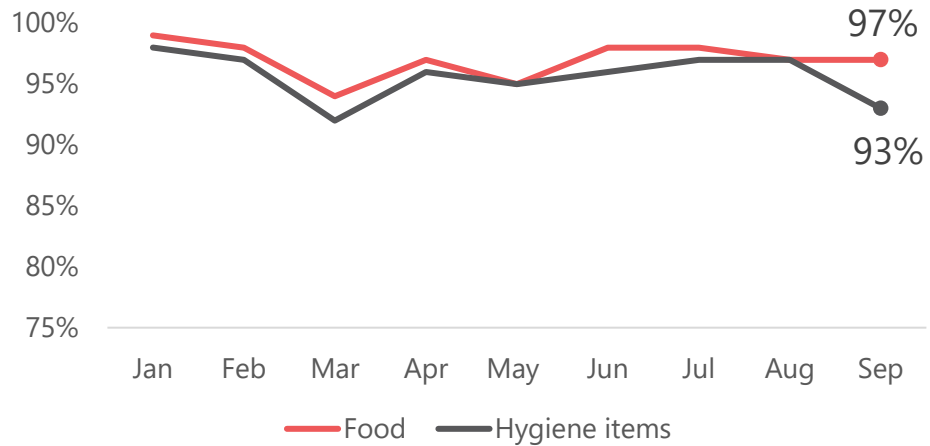
A light gray world map is centered on the page, overlaid on a background of a light gray geometric pattern of interconnected lines forming various polygons. The number '03' is printed in a bold, red, sans-serif font, positioned centrally over the map.

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 September

	Food items	Hygiene items	Warm clothes	Medication
East	6%	10%	19%	18%
South	11%	11%	26%	20%
National	3%	5%	10%	7%

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

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

Food items
Marinska (Donetska) Berezhnevatska (Mykolaivska)

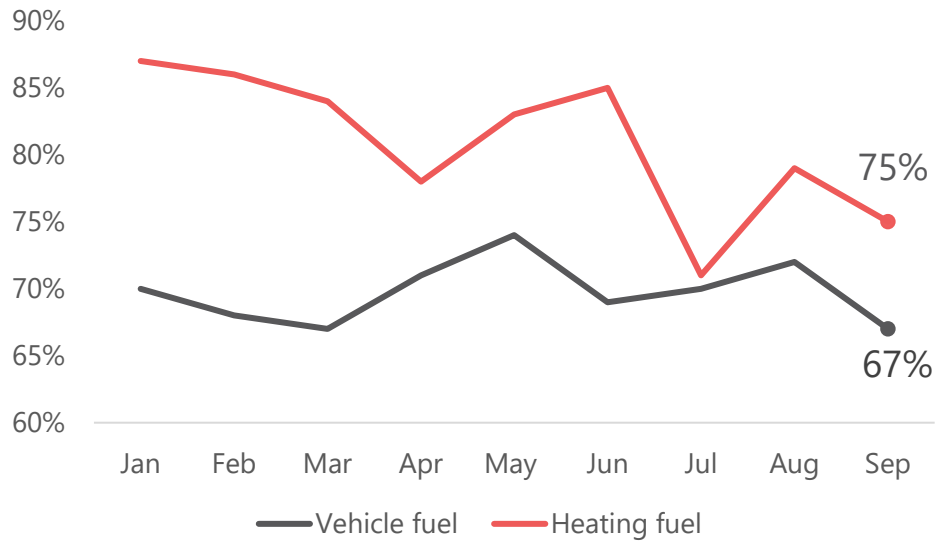
Warm clothes
Slovianska (Dnipropetrovska) Marinska, Pokrovska (Donetska) Stepnenska, Shyroktivska (Zaporizka) Berezhnevatska (Mykolaivska) Beryslavska, Borozenska, Novovorontsovska (Khersonska)

Hygiene items
Marinska (Donetska) Berezhnevatska (Mykolaivska) Beryslavska (Khersonska)

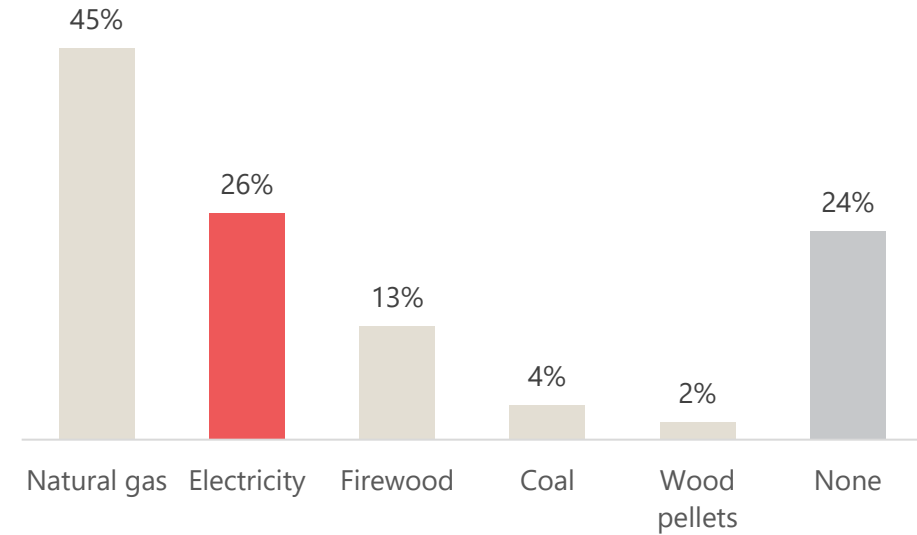
Medication
Slovianska (Dnipropetrovska) Marinska, Pokrovska (Donetska) Stepnenska (Zaporizka) Berezhnevatska (Mykolaivska) Beryslavska (Khersonska)

Availability of fuels

% of customer KIs reporting full availability of fuels, nationally



% of customer KIs reporting they regularly purchase electricity for heating purposed compared to other heating fuels* in September, nationally



* Respondents could select more than one option.

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

Heating fuel

Marinska, Pokrovska (**Donetska**)
Beryslavska, Borozenska
(**Khersonska**)

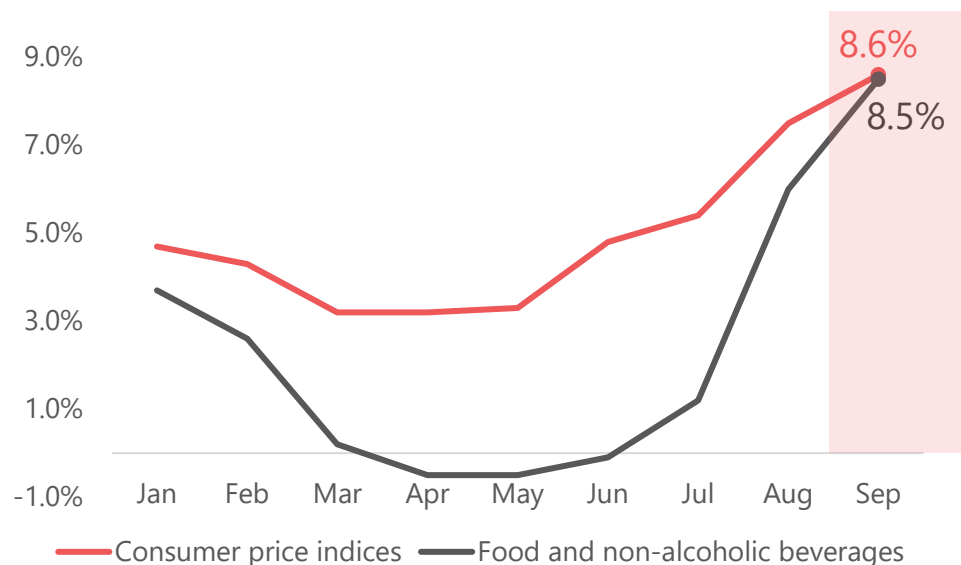
Vehicle fuel

Marinska, Pokrovska (**Donetska**)
Shyroktivska (**Zaporizka**)
Berezhnevatska (**Mykolaivska**)
Beryslavska, Borozenska
(**Khersonska**)

The situation in the energy sector remained largely stable in September, but significant damage caused by massive shelling continued to challenge its operation.

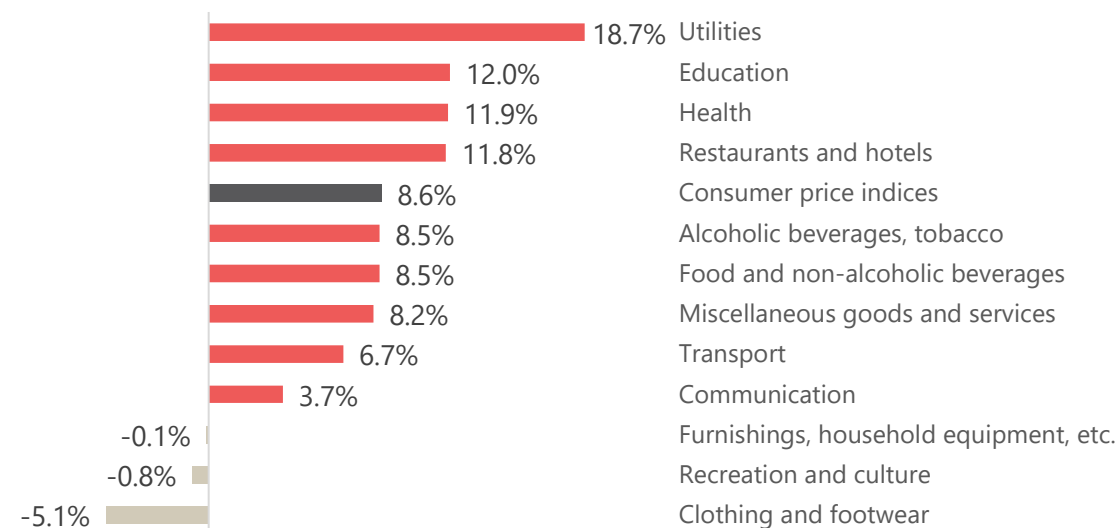
Prices

Annual inflation rate*, %



Source: SSSU

Consumer price changes (%) for groups of food and services, from September 2023 to September 2024



Source: SSSU



Monthly inflation* rose to 1.5% in September, up from 0.6% in August. The price increase **was driven by an acceleration in food inflation** due to a limited supply of certain food items, as well as higher costs of food raw materials, higher production costs, in particular energy and labour, and carry-over effects from the weakening of the hryvnia exchange rate in previous months**.

Electricity and vegetable prices increased the most in annual terms (by 63.6% and 56.4% respectively).

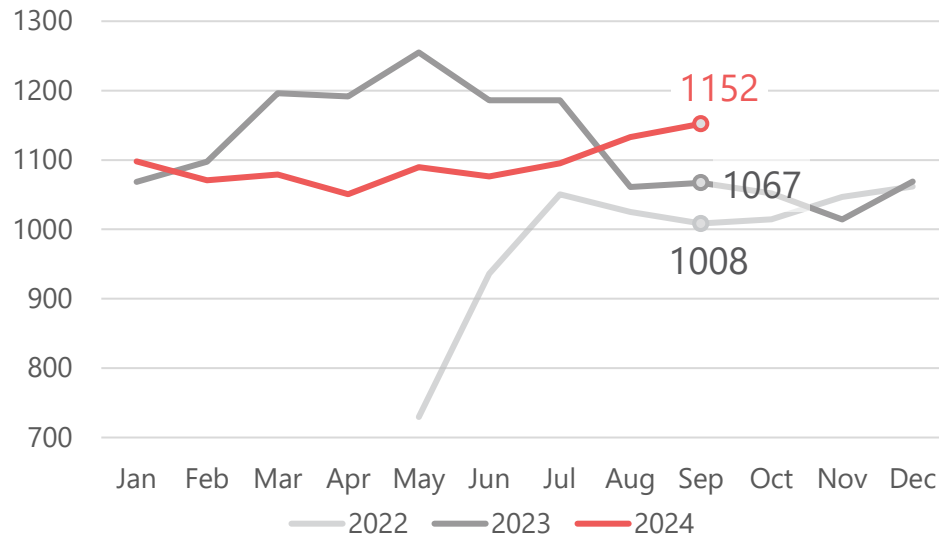
Inflationary pressures will persist in the coming months due to increased budget expenditures, further imbalances in the labour market, and an expected increase in the electricity shortage during the heating season**.

* 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, [NBU September inflation update](#), 11 October 2024.

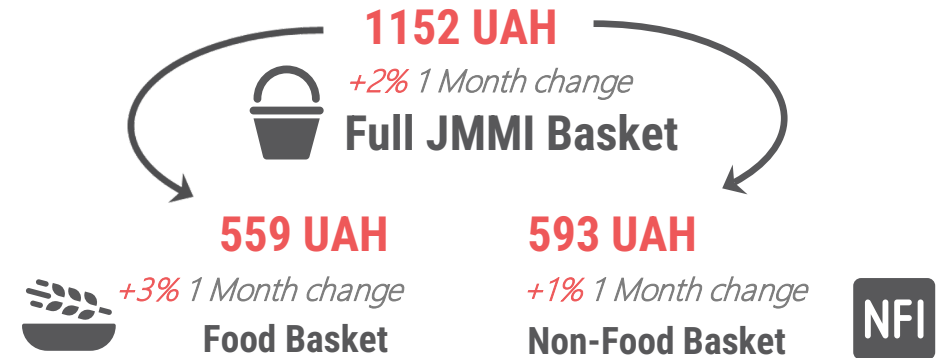
Prices for items in the JMMI basket

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



In September 2024, the most expensive JMMI basket was calculated based on prices reported in Chernihivska hromada of Chernihivska oblast (UAH 1,496).

JMMI basket in September

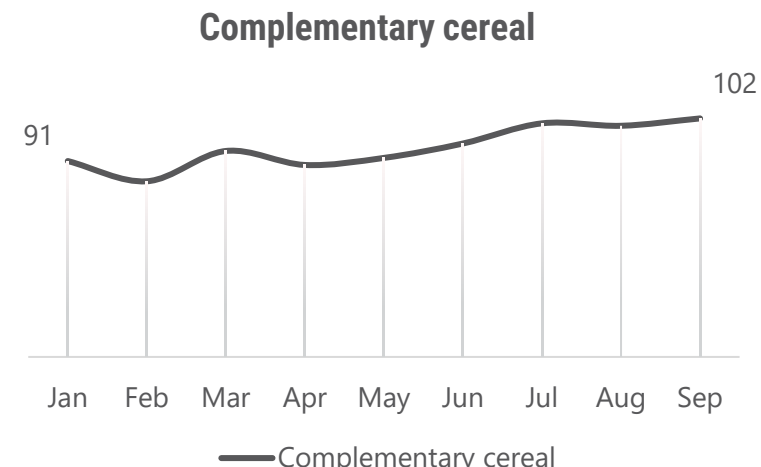
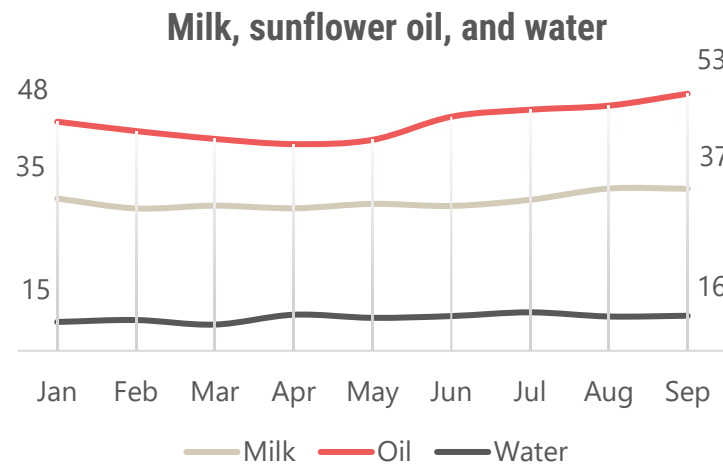
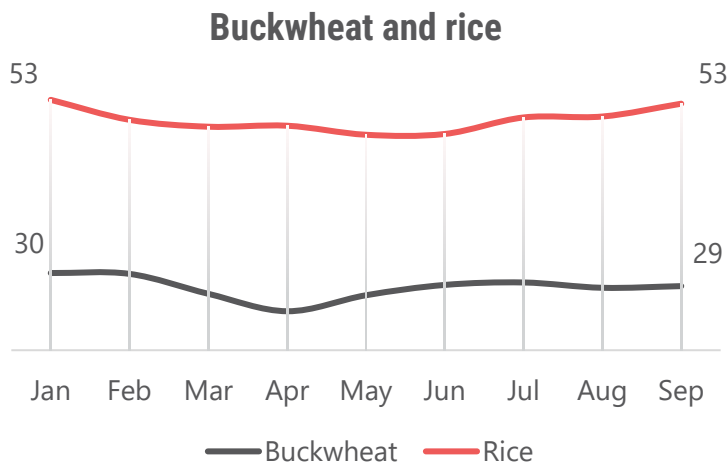
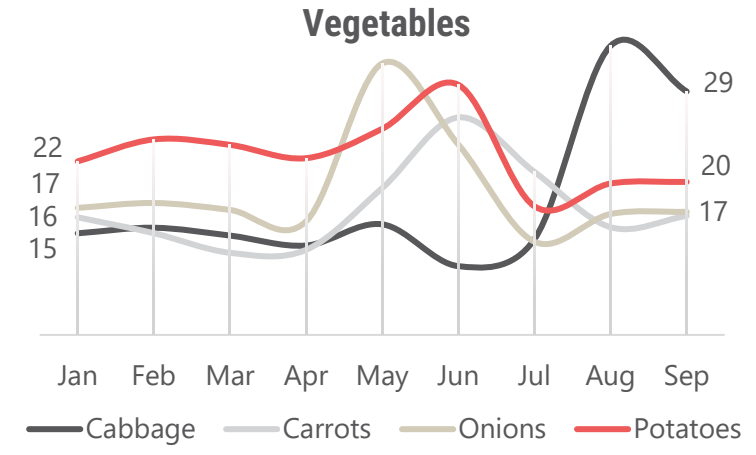
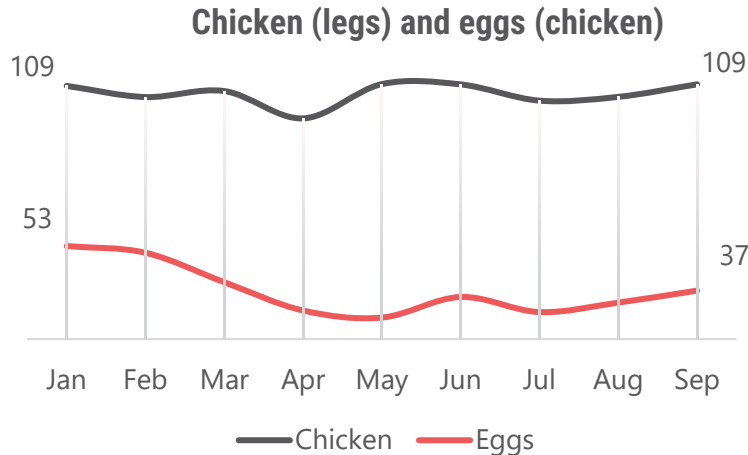
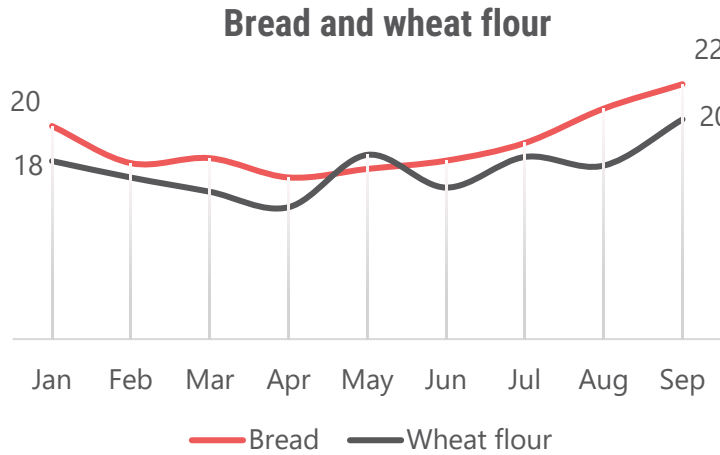


JMMI basket in September, by type of area



Prices for items in the JMMI basket

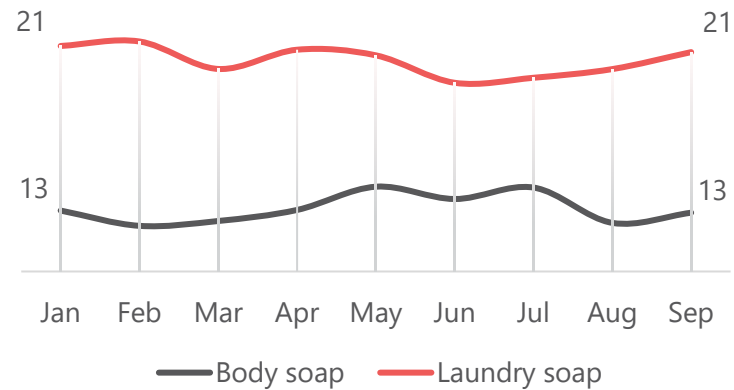
Trends in median food prices (in UAH) in the JMMI basket, nationally



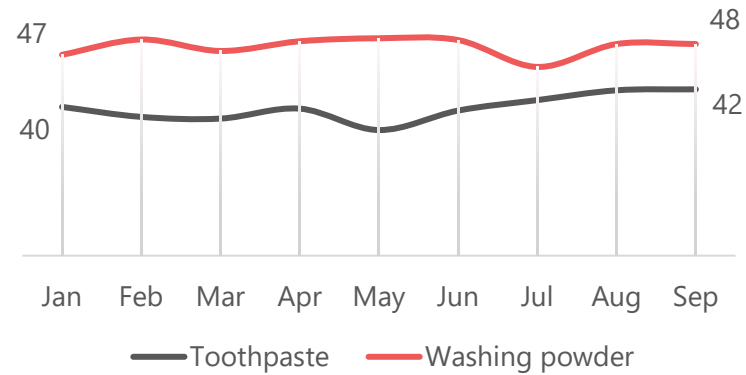
Prices for items in the JMMI basket

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

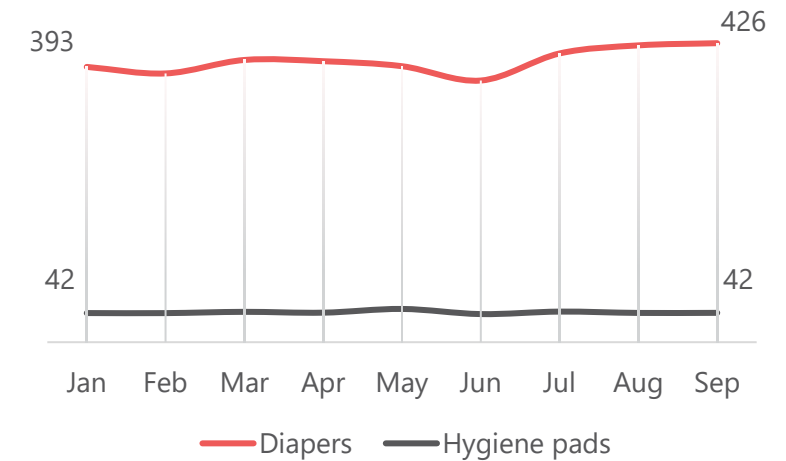
Body soap and laundry soap



Toothpaste and washing powder

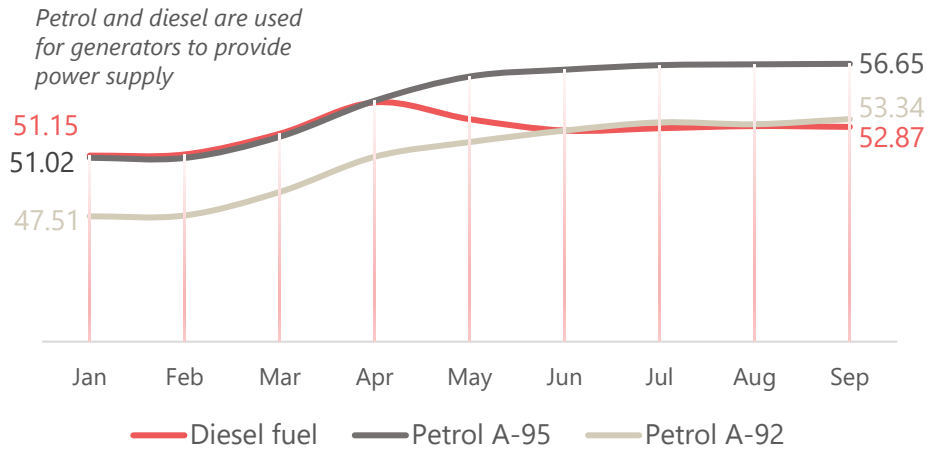


Diapers for infants and sanitary pads



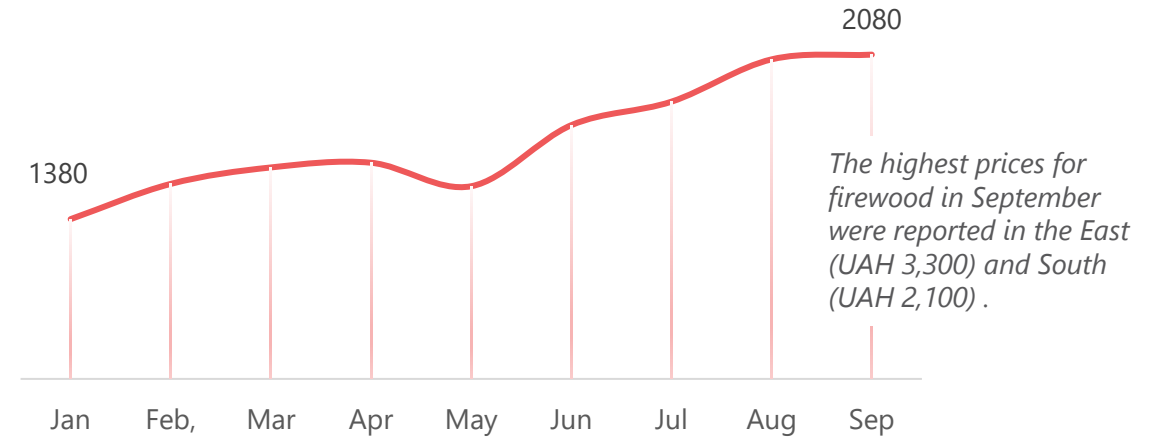
Prices for fuels

Average vehicle fuel prices (UAH per litre)

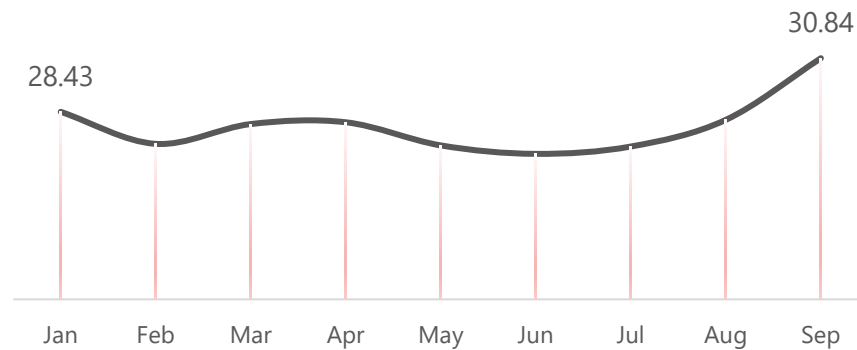


Source: SSSU

Median firewood price (UAH per cubic metre)



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



Source: SSSU



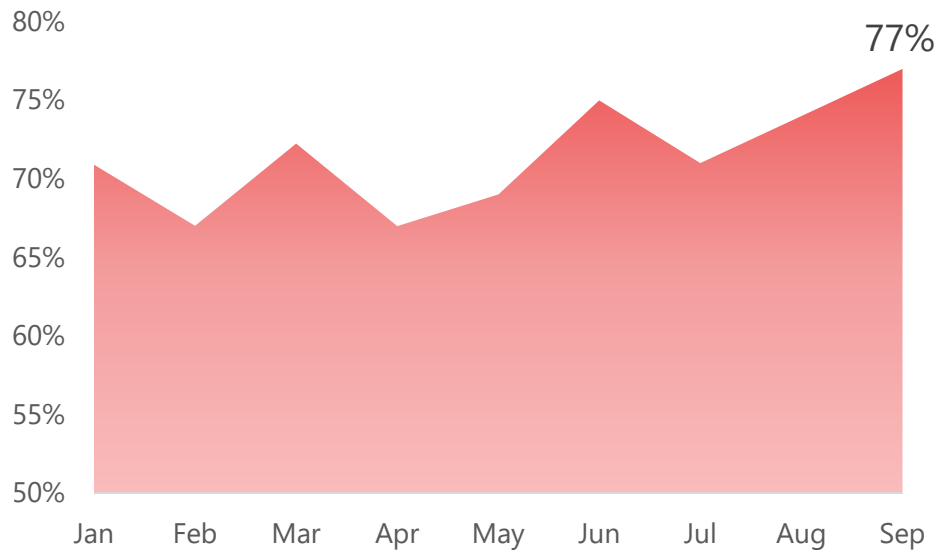
On 1 September 2024, excise taxes on fuel have increased, which can affect its cost.

The National Bank of Ukraine predicts that fuel prices can rise by more than 9% by the end of the year*. The next stage of fuel excise tax increases is scheduled for 1 January 2025.

* National Bank of Ukraine, [Inflation Report, July 2024](#), 1 August 2024.

Affordability

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



64% of customer KIs reporting rising prices as the primary reason for financial challenges to accessing goods

14% of customer KIs reporting being unable to afford to purchase necessary items despite the price of these items had not increased

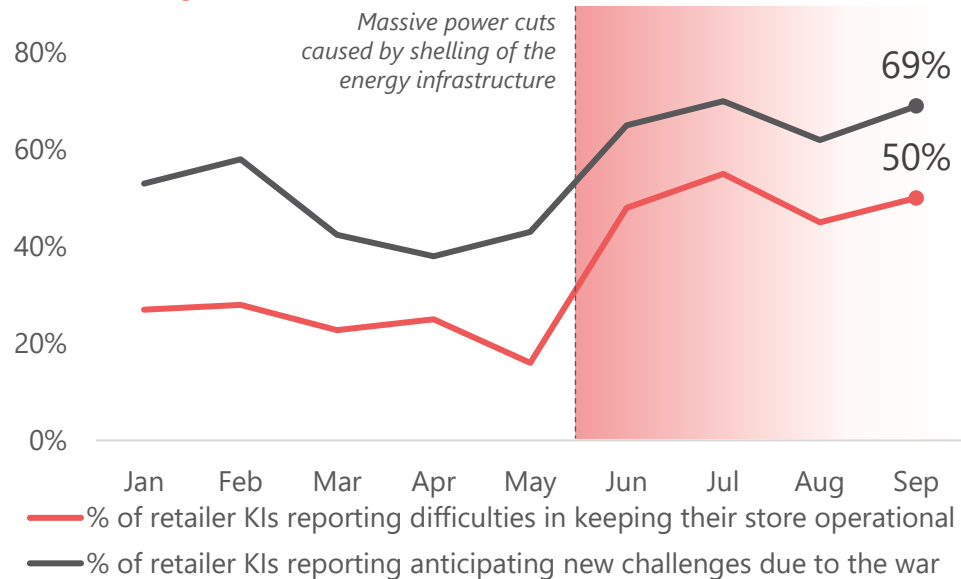
% of customer KIs reporting that financial factors* affected their access to goods in stores or marketplaces in September, by type of barrier, age group, gender, and type of area (N=437)

Reported financial barrier	18-59 years old	60 years and above	Women	Men	Rural	Urban
Item price have increased	63%	76%	66%	69%	72%	64%
Cannot afford the items (despite prices have not risen)	12%	23%	17%	8%	15%	12%
Fuel for vehicle is too expensive	26%	6%	14%	35%	15%	26%
Public transportation is too expensive	8%	10%	10%	6%	11%	7%
Items are not available	4%	3%	7%	2%	7%	5%
Do not have enough physical cash	3%	1%	2%	3%	2%	3%

* 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 Bohodukhivska, Blyzniukivska, Lozivska, Pervomaiska, Derhachivska, and Slobozhanska hromadas of **Kharkivska oblast** faced some restocking issues, reportedly requiring two weeks to resupply sunflower oil, wheat flour, rice, buckwheat, complementary cereal for babies, as well as 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 September (N=167)

- 1 **30%** Storage of goods during the absence of electricity
- 2 **17%** Price increase among suppliers
- 3 **16%** Full staffing

Trade enterprises anticipated an increase in trade turnover and the amount of goods purchased for sale, while also expecting a rise in purchase prices and the overall cost of goods**.

Top 2 challenges* retailer KIs expected to face in the coming months due to the war in September (N=241)

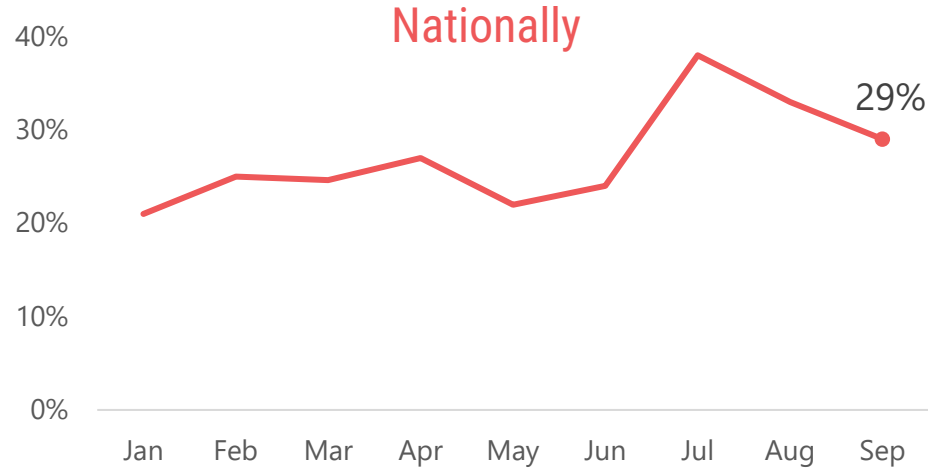
- 1 **63%** Rising prices
- 2 **35%** Reduced purchasing power of customers

* Respondents could select more than one option.

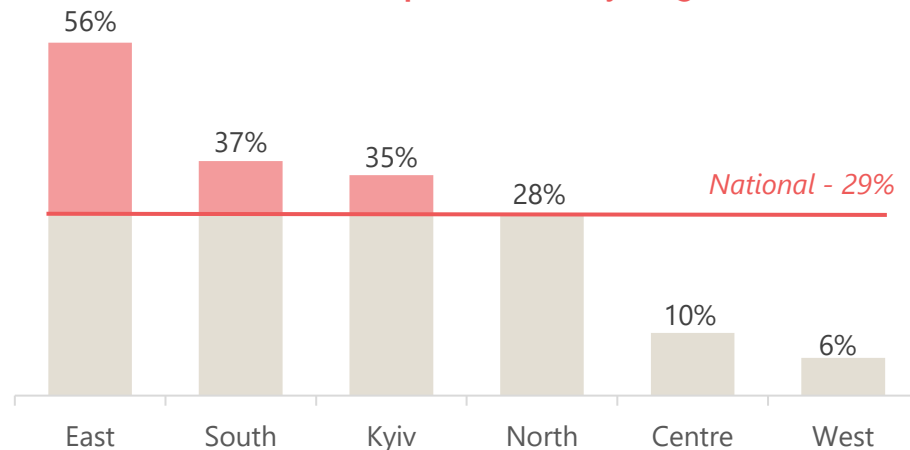
** National Bank of Ukraine, [Monthly Business Outlook Survey](#), September 2024, 1 October 2024.

Accessibility of stores and markets

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



In September, by region



Main physical barriers* to accessing stores or marketplaces reported by customer KIs in September (N=177)



Active fighting or shelling
90% Donetska
34% Khersonska
13% Kharkivska



Feeling unsafe due to fear of being targeted
90% Donetska
24% Khersonska
22% Kharkivska



Movement restrictions
85% Donetska
40% Khersonska
33% Kharkivska



Buildings or infrastructure have been damaged
45% Donetska
24% Khersonska



Damage or blockages on roads
20% Donetska



Lack of transportation
50% Donetska
14% Khersonska



Power outages
23% Mykolaivska
20% Donetska

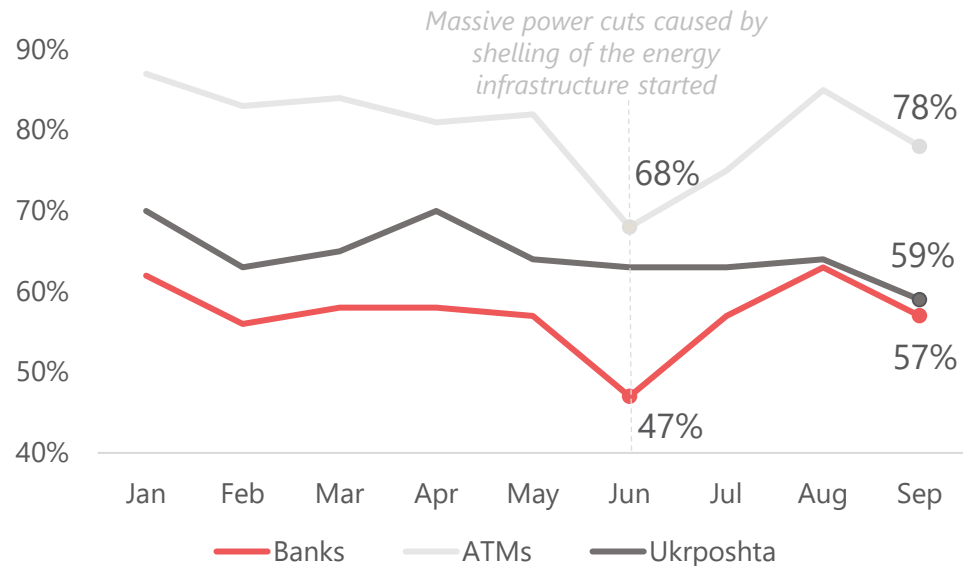


Air alerts
63% Chernihivska
40% Donetska

* 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 36% of customer KIs) and Ukrposhta offices (40%) across the country.

The frequency and length of alarms were tending to increase.

Main barriers* to accessing financial services, reported by customer KIs in September:

Bank branches (N=273)

The unavailability
50% Zaporizka
33% Donetska

Accessible only nearby
42% Kyivska
40% Khersonska
28% Kharkivska

Power outages
9% Mykolaivska
8% Dnipropetrovska

ATMs (N=128)

No ATM
50% Zaporizka
34% Khersonska
27% Mykolaivska

The limited number
50% Kyivska
25% Kharkivska
14% Donetska

Power outages
48% Sumska
32% Mykolaivska
32% Dnipropetrovska

Ukrposhta offices (N=222)

The unavailability
24% Donetska

**Irregular operation:
several days a week**
50% Zaporizka
10% Donetska

Power outages
43% Dnipropetrovska
18% Mykolaivska
10% Khersonska

* Respondents could select more than one option.

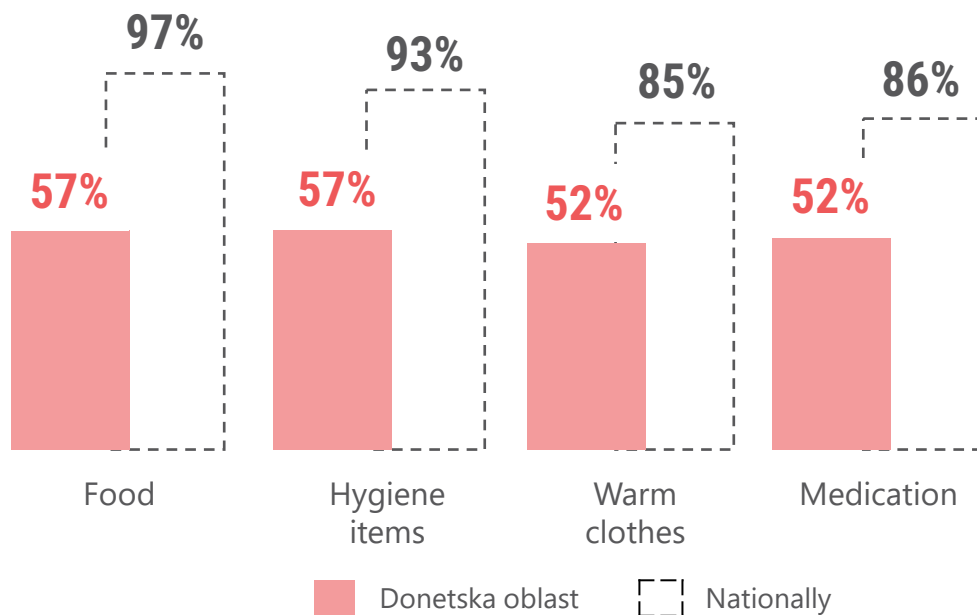
A world map is shown in a light gray, semi-transparent style, overlaid on a background of a light gray geometric pattern consisting of interconnected lines forming various sized triangles and polygons. The map is centered on the Atlantic Ocean. A large, bold, red number '04' is positioned in the center of the map, over the European continent.

04

Focus on Donetska oblast

Donetska oblast

% of customer KIs reporting full availability of essential items



Availability of essential items reported by customer KIs* in:

Marinska hromada

Pokrovska hromada



■ Not available ■ Fully available
■ Limited availability ■ Do not know / No need

* N=5 in each hromada.

Marinska hromada, followed by Pokrovska hromada were found to be the most challenging in terms of access to essentials.

Note. On this slide, as well as on the following two, data is provided on the areas of Donetska oblast under control of the government of Ukraine.

Donetska oblast

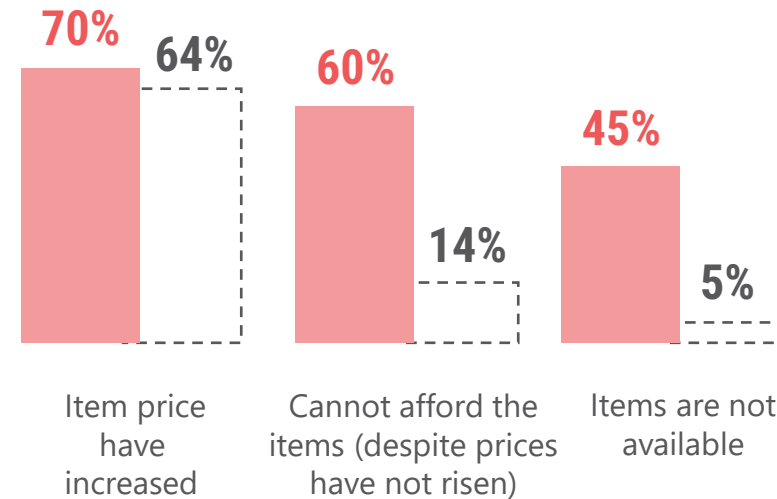
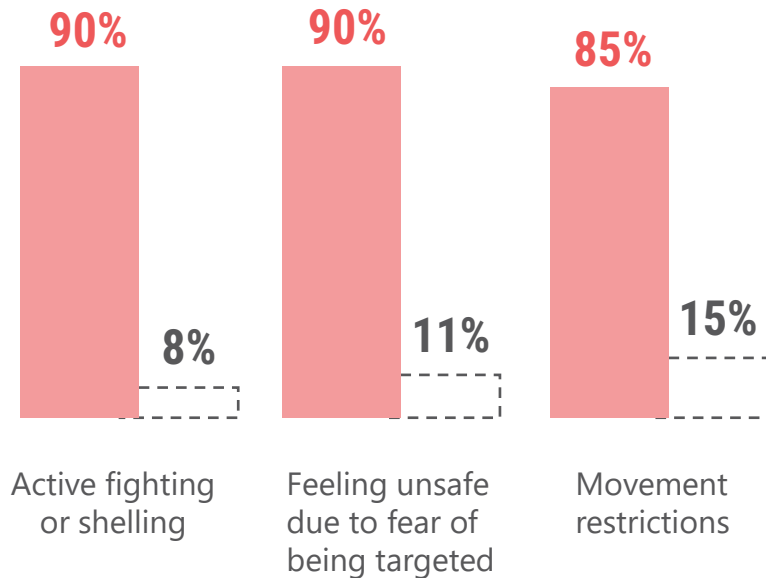
Accessibility of stores and affordability of goods in the stores reported by customer KIs

100% of customer KIs reporting that the full-scale war was affecting their ability to physically access stores or marketplaces

100% of customer KIs reporting financial-related challenges that impact their access to goods

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

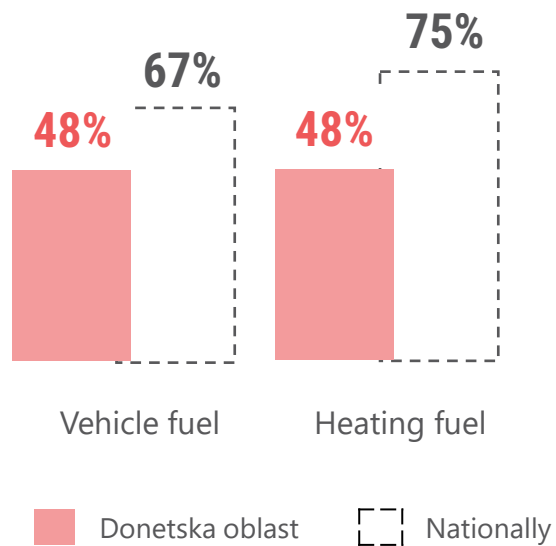
Main financial barriers to accessing goods in the stores reported by customer KIs



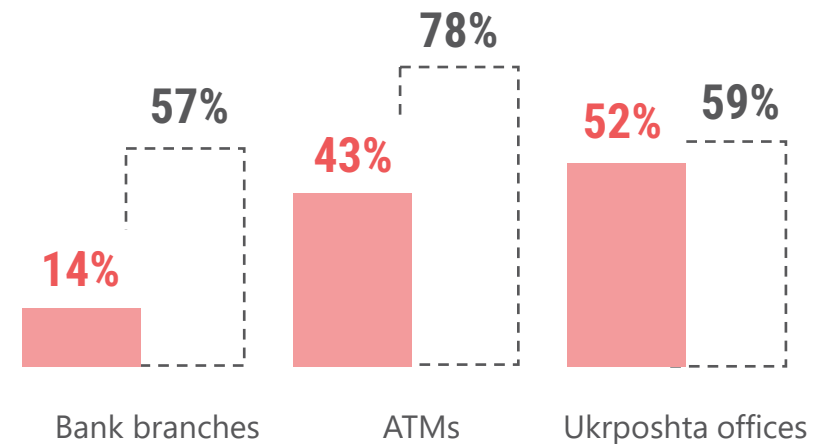
■ Donetska oblast □ Nationally

Donetska oblast

% of customer KIs reporting full availability of fuels



% of customer KIs reporting full availability of functioning financial services



Marinska hromada was identified as being one where customers did not have access to financial services, as all customer KIs in this hromada reported the unavailability of bank branches, ATMs, and Ukrposhta offices.

Thank you for your attention



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REACH Informing
more effective
humanitarian action