



# Joint Market Monitoring Initiative (JMMI) November 2024

**REACH Ukraine**

**REACH** Informing  
more effective  
humanitarian action

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



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- 03** Market overview
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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 outlines of continents and countries. 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 November 2024



**13** Participating partners

**18** Assessed *oblasts*

**102** Assessed *hromadas*

**881** Key informant interviews (KIIs)

**525** customers surveyed



**356** retailers surveyed

**20** Commodities assessed

# Partners



# Donors



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.

02

# Key findings



# Key findings

**Rising prices topped the list of challenges faced by retailers, a trend that most anticipated would persist in the coming months.** A significant driver of price increases was the continued acceleration in food prices. The median cost of the JMMI food basket rose by 25% compared to November of the previous year, with the most notable annual surges in prices for vegetables, such as cabbage (+226%), carrots (+189%), and potatoes (+151%).

**Nationwide, rising prices have significantly impacted access to goods,** with 75% of customer KIs identifying higher prices as their primary financial barrier. The elderly population was particularly affected, with 91% of customer KIs aged 60 and above reporting an inability to afford essential items available in stores.

**While local markets functioned well in most of the country,** access to stores and markets in southern and eastern areas near the frontline remained limited due to security concerns, damaged market infrastructure or roads leading to these locations, and limited transportation options. Customer KIs in these locations also reported challenges in obtaining essential items and fuels due to their partial or complete unavailability. Additionally, access to money was constrained by the lack of functioning banks and ATMs within these hromadas.



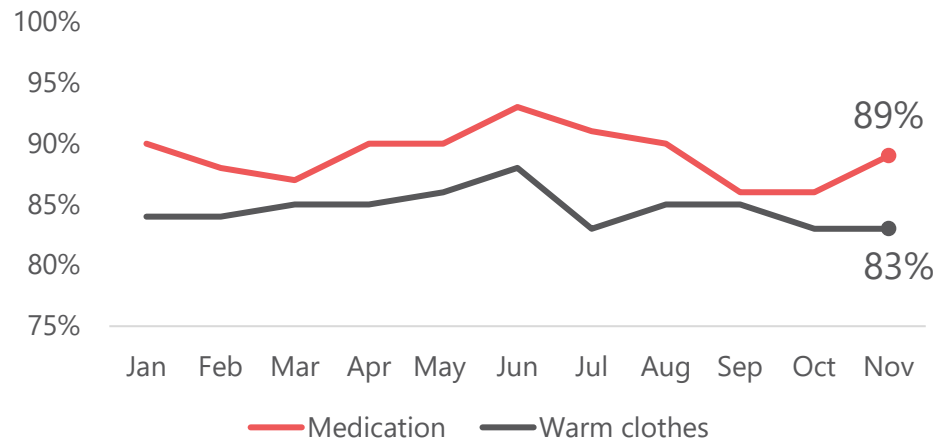
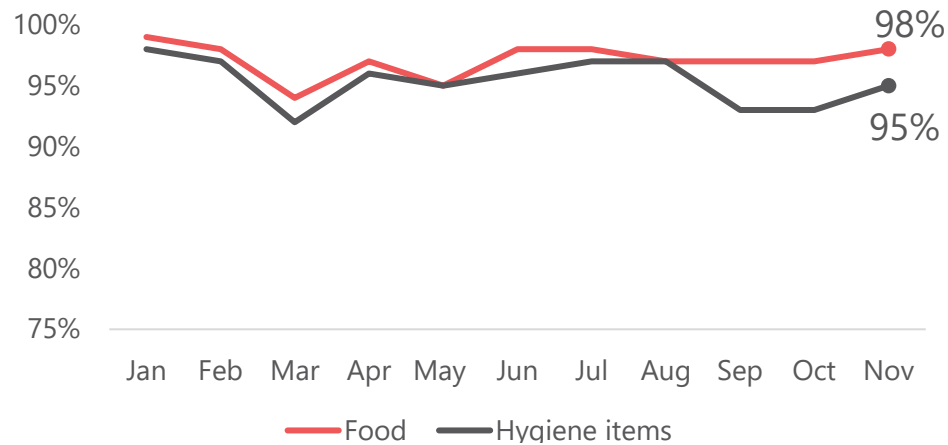
A light gray world map is centered on the slide, overlaid with a faint, light gray geometric pattern of interconnected triangles. The map shows the outlines of the continents. The number '03' is positioned above the title.

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 November

	Food items	Hygiene items	Warm clothes	Medication
East	4%	6%	18%	8%
South	10%	15%	30%	28%
National	2%	5%	13%	7%

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

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

Food items
Bereznehuvatska ( <b>Mykolaivska</b> ) Beryslavska ( <b>Khersonska</b> )

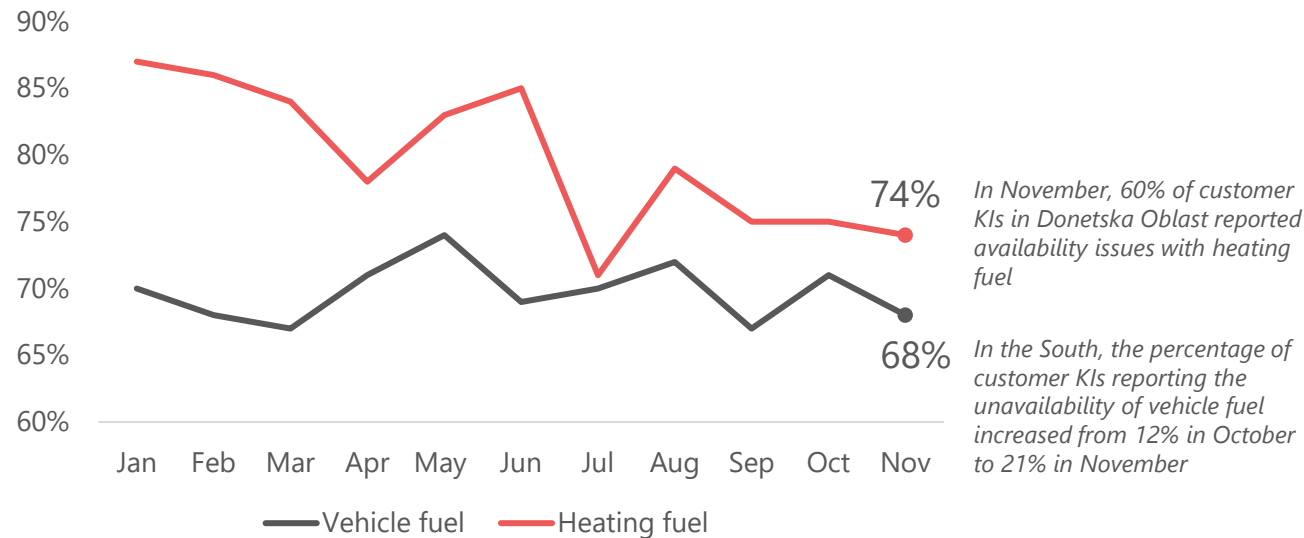
Hygiene items
Bereznehuvatska ( <b>Mykolaivska</b> ) Beryslavska ( <b>Khersonska</b> )

Warm clothes
Slovianska ( <b>Dnipropetrovska</b> ) Pokrovska ( <b>Donetska</b> ) Stepnenska, Shyroktivska ( <b>Zaporizka</b> ) Bereznehuvatska ( <b>Mykolaivska</b> ) Beryslavska ( <b>Khersonska</b> )

Medication
Slovianska ( <b>Dnipropetrovska</b> ) Stepnenska, Shyroktivska ( <b>Zaporizka</b> ) Bereznehuvatska ( <b>Mykolaivska</b> ) Beryslavska ( <b>Khersonska</b> )

# Availability of fuels

% of customer KIs reporting full availability of fuels, nationally



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

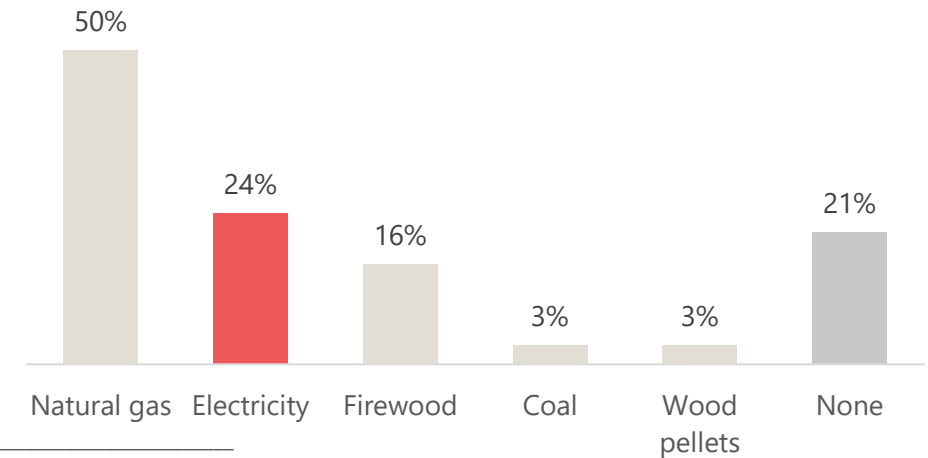
## Heating fuel

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

## Vehicle fuel

Stepnenska, Shyrovivska (**Zaporizka**)  
Berezhnevatska (**Mykolaivska**)  
Burynska (**Sumska**)  
Beryslavska, Borozenska (**Khersonska**)

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



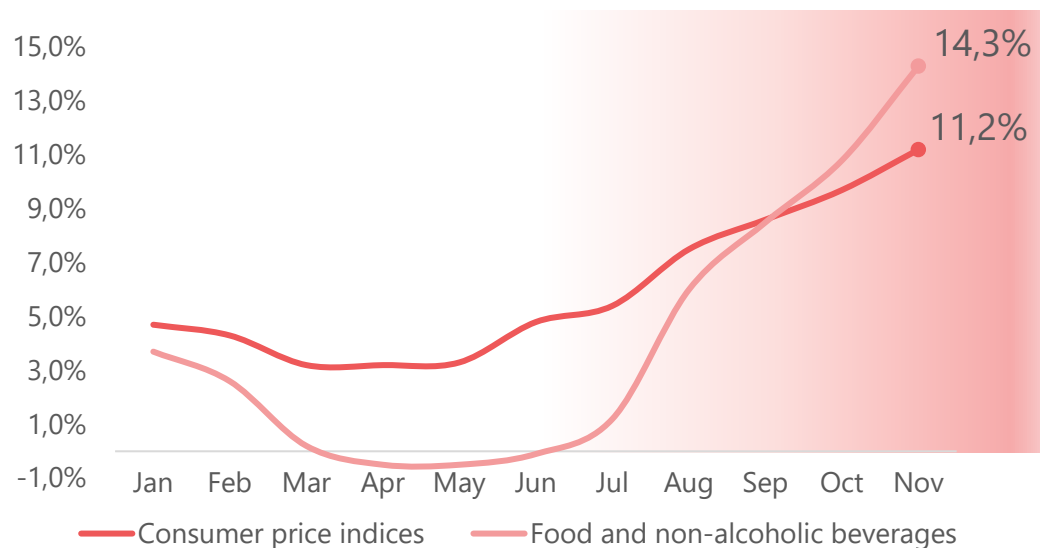
\* Respondents could select more than one option.

The energy sector remained largely stable during the data collection period in November. However, in the second half of the month, two large-scale attacks on energy infrastructure caused widespread power outages across the country.

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

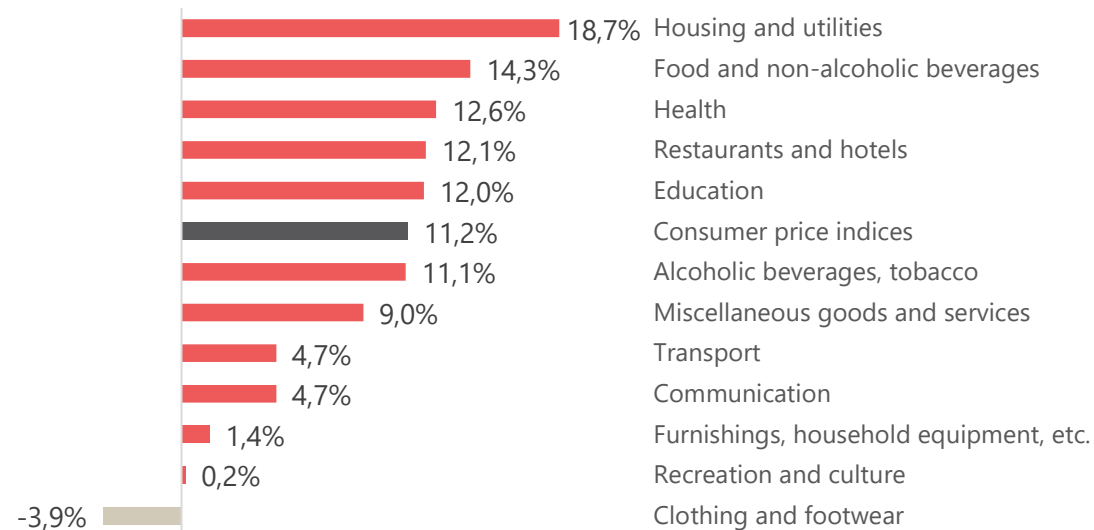
# Prices

## Annual inflation rate\*, %



Source: SSSU

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



Source: SSSU



Monthly inflation\* increased to 1.9% in November, up from 1.8% in October. The most significant price increase was for eggs (by 54.6%).

The increase in monthly inflation **was primarily driven by higher food prices**, influenced by unfavorable weather conditions that impacted crop yields and reduced food supply. Increased costs for raw materials contributed to higher prices for processed foods. Rising business expenses, particularly for electricity and labor, added further upward pressure\*\*.

## Electricity and vegetable prices increased the most annually (by 63.6% and 62.9% respectively).

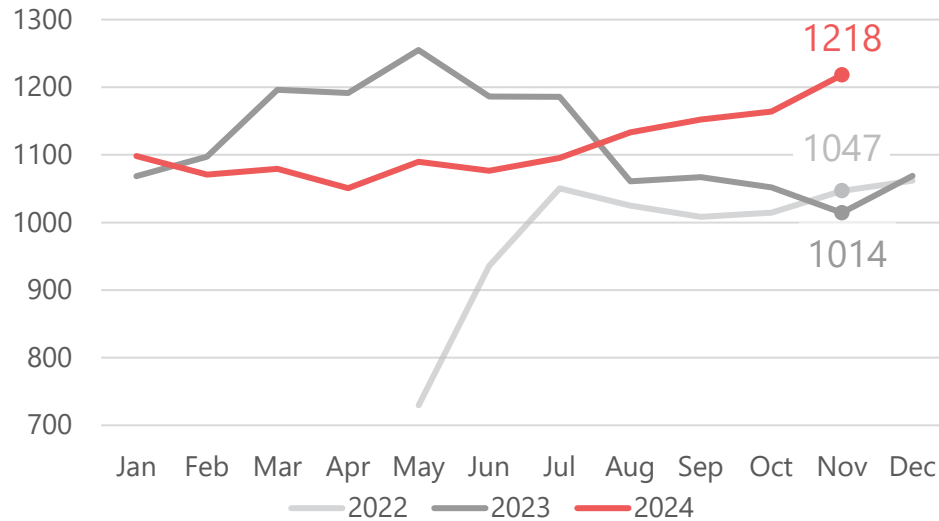
In the coming months, inflationary pressures are expected to persist due to the supply of certain food products being lower than last year, and because of significant budget expenditures, high wage growth, and power shortages during the heating season\*\*.

\* 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 November inflation update](#), 12 December 2024.

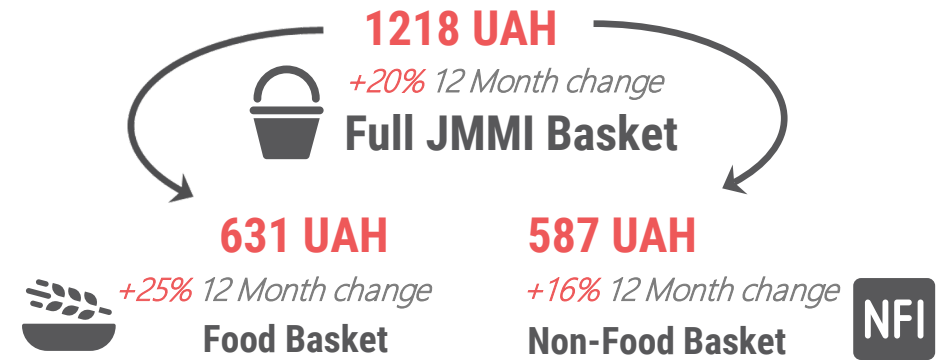
# Prices for items in the JMMI basket

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

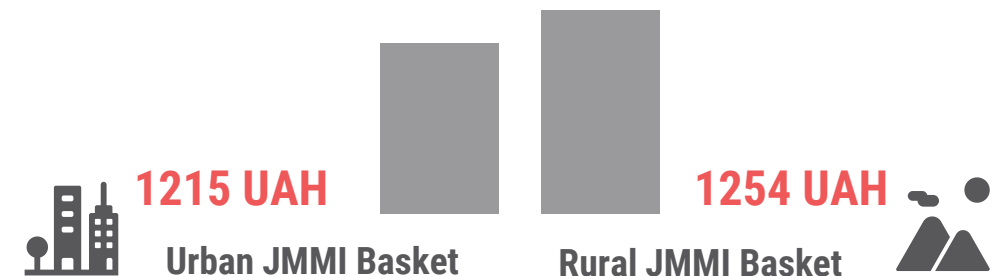


In November 2024, the highest monthly increase in the cost of the full JMMI basket (+18%) and the highest overall value (1359 UAH) were both observed in the North.

JMMI basket in November



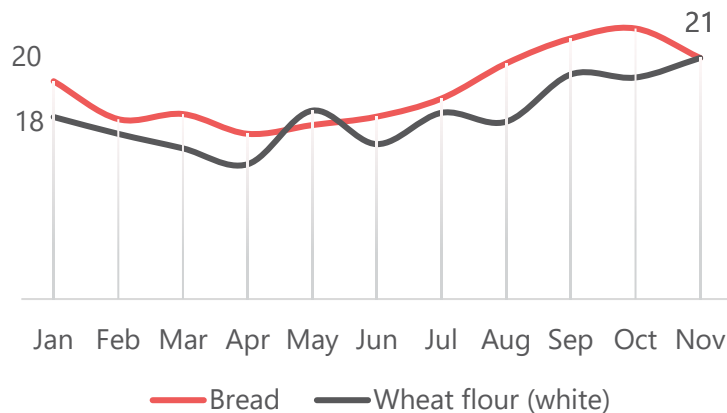
JMMI basket in November, by type of area



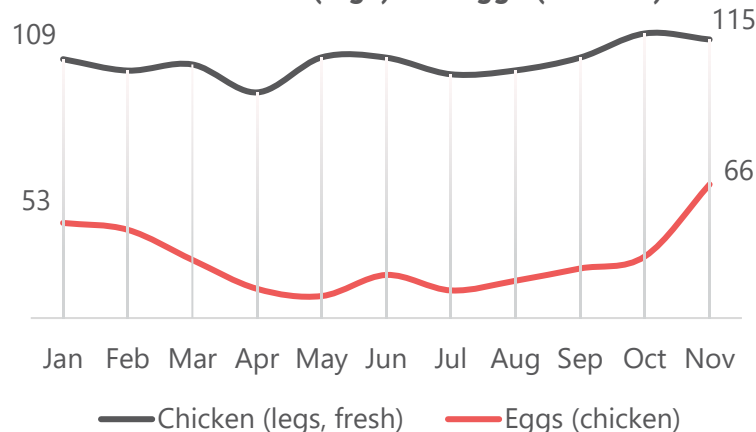
# Prices for items in the JMMI basket

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

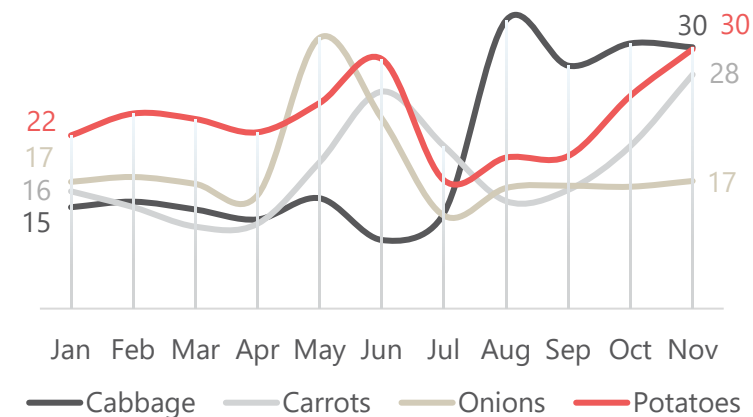
## Bread and wheat flour



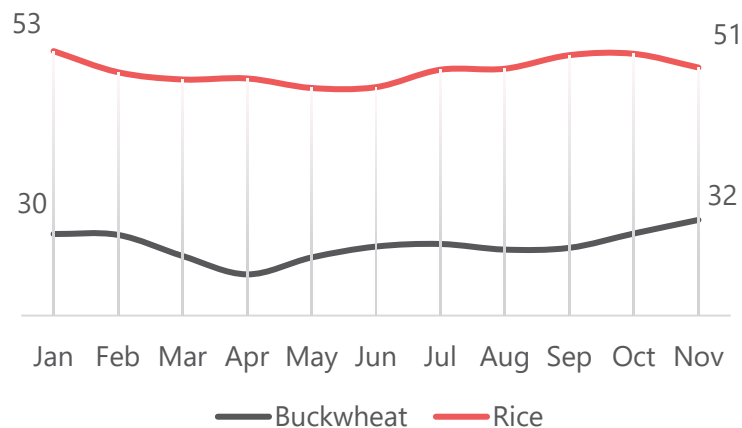
## Chicken (legs) and eggs (chicken)



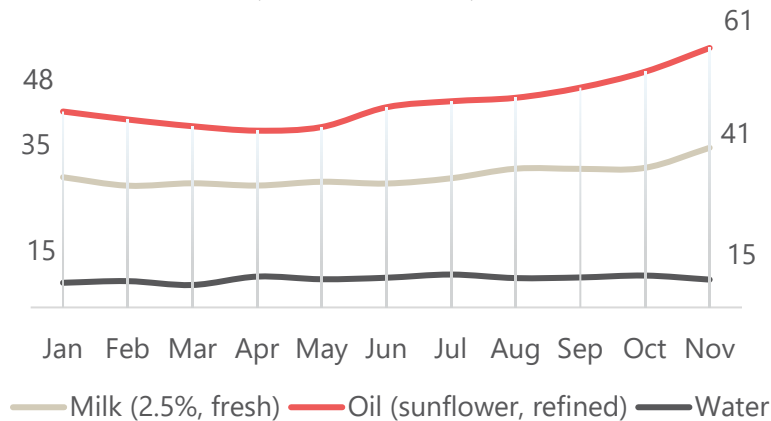
## Vegetables



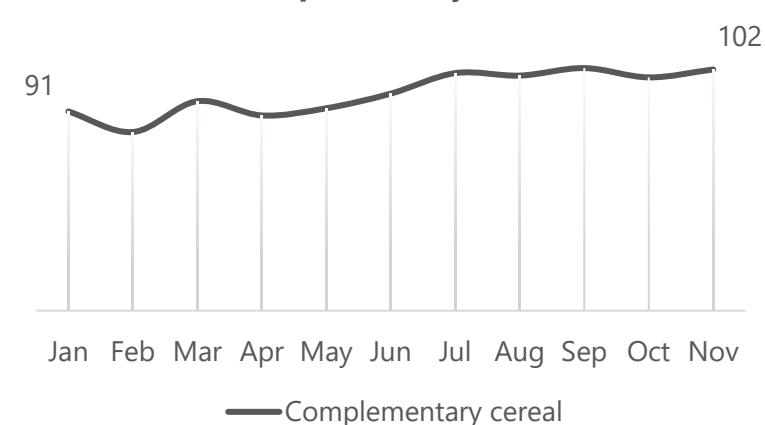
## Buckwheat and rice



## Milk, sunflower oil, and water



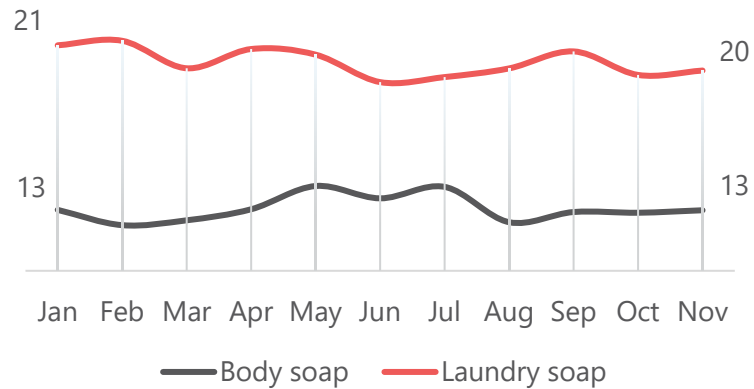
## Complementary cereal



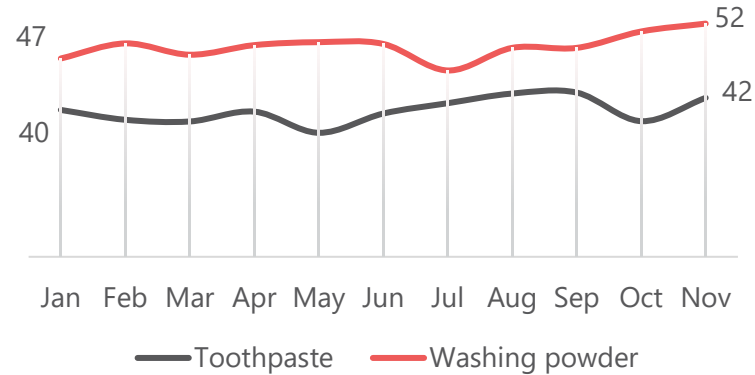
# Prices for items in the JMMI basket

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

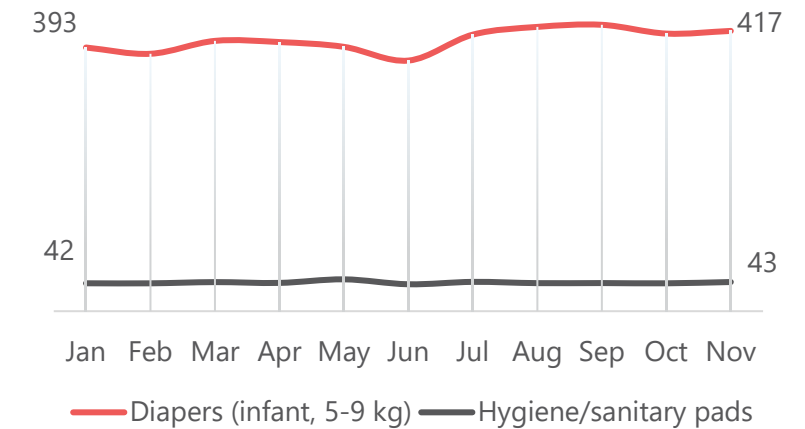
## Body soap and laundry soap



## Toothpaste and washing powder



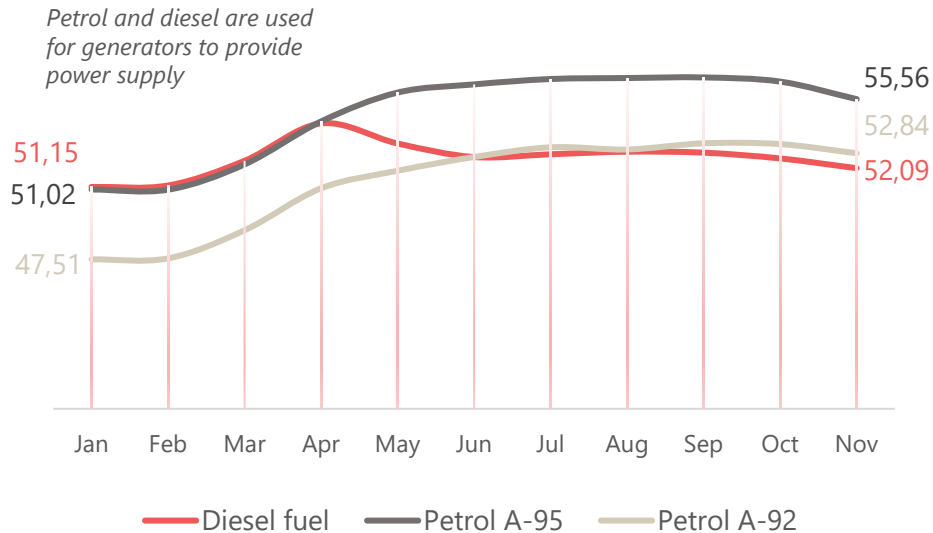
## Diapers for infants and sanitary pads





# Prices for fuels

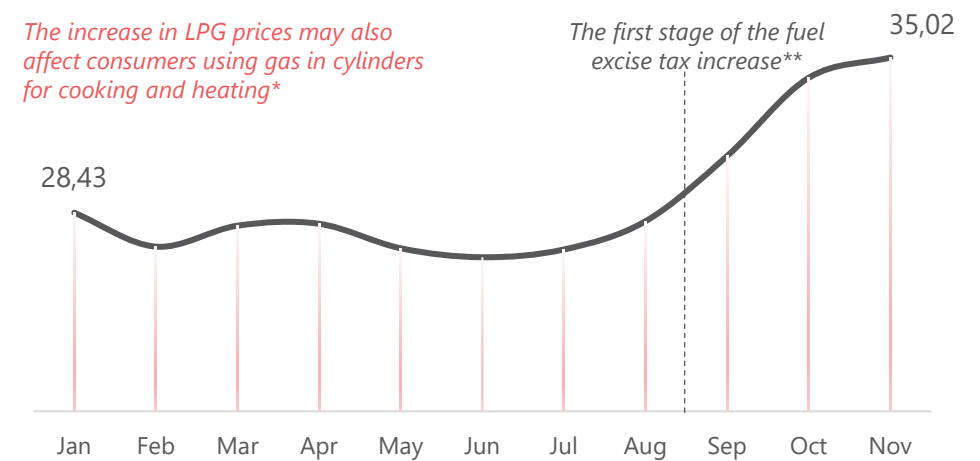
## Average vehicle fuel prices (UAH per litre)



Source: SSSU

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.

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



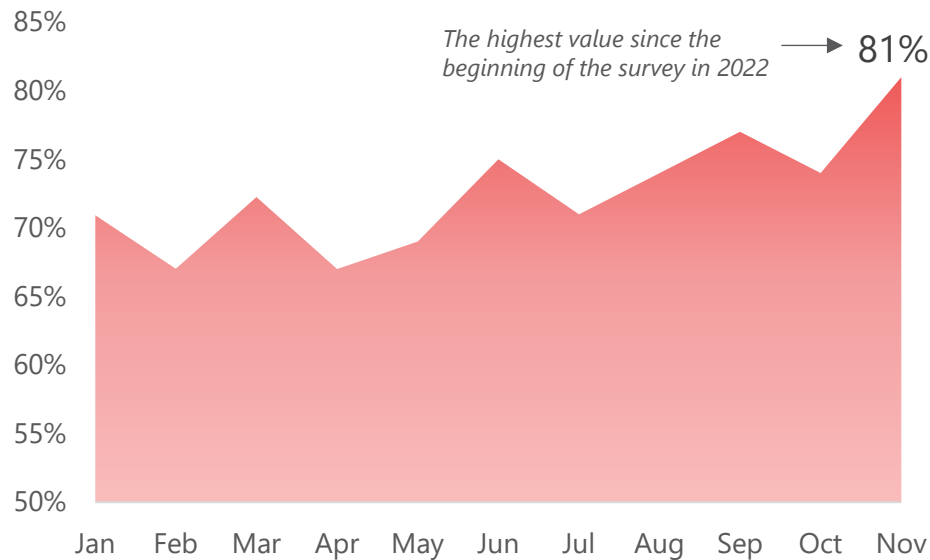
Source: SSSU

\* 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



**91%** of customer KIs aged 60 and above reporting that financial factors affected their access to goods in stores or marketplaces in November.

**The East** topped the list of regions with the highest percentage of customer KIs reporting that higher prices affected their access to goods. **96%**

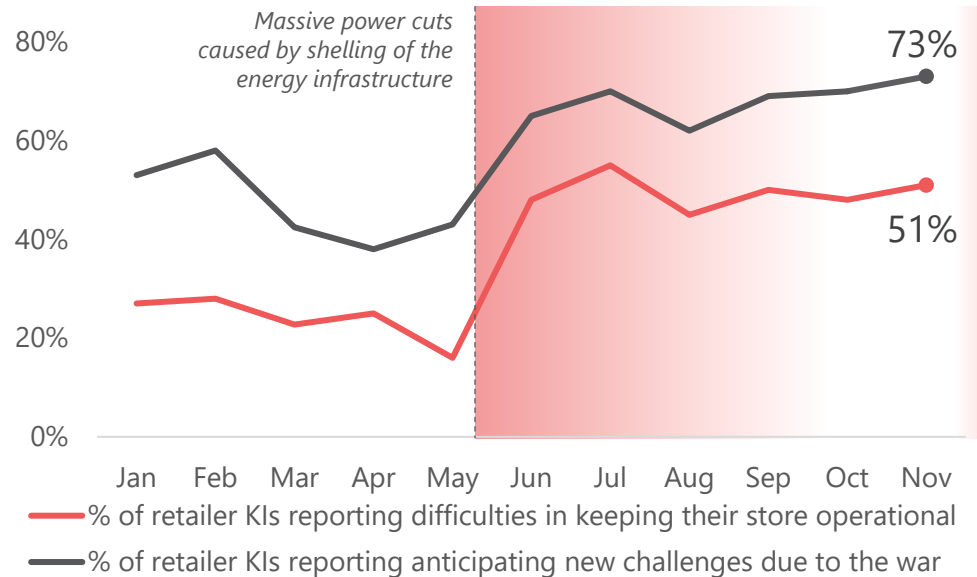
% of customers KIs reporting that financial factors\* affected their access to goods in stores or marketplaces in November, by type of barrier, age group, gender, and type of area (N=382)

Reported financial barrier	18-59 years old	60 years and above	Women	Men	Rural	Urban
Item price have increased	75%	88%	81%	73%	84%	74%
Fuel for vehicle is too expensive	26%	18%	14%	39%	22%	23%
Public transportation is too expensive	11%	24%	17%	7%	18%	11%
Cannot afford the items (despite prices have not risen)	7%	7%	9%	5%	10%	6%
Items are not available	3%	3%	5%	2%	6%	2%
Do not have enough physical cash	2%	2%	1%	2%	2%	2%

\* 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, Lozivska, Pervomaiska, 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. Additionally, retailer KIs in Bohdanivska hromada of **Dnipropetrovsk Oblast** required 12 days to restock those mentioned hygiene items.

Top 3 difficulties\* faced by retailer KIs in keeping their store operational and well-stocked due to the war in November (N=150)

- 1 **25%** Price increase charged by suppliers
- 2 **18%** Movement restrictions Fully staffing the store
- 3 **17%** Fully staffing the store  
Storage of goods during the absence of electricity

The factors leading to difficulties keeping stores operational and well-stocked included increased intensity of hostilities, renewed power outages due to attacks on energy infrastructure, further growth in energy, labor and logistics costs for businesses, accelerating inflation, a significant shortage of skilled workers, and seasonal factors\*\*.

Top 2 challenges\* retailer KIs expected to face in the coming months due to the war in November (N=249)

- 1 **68%** Rising prices
- 2 **44%** Reduced purchasing power of customers

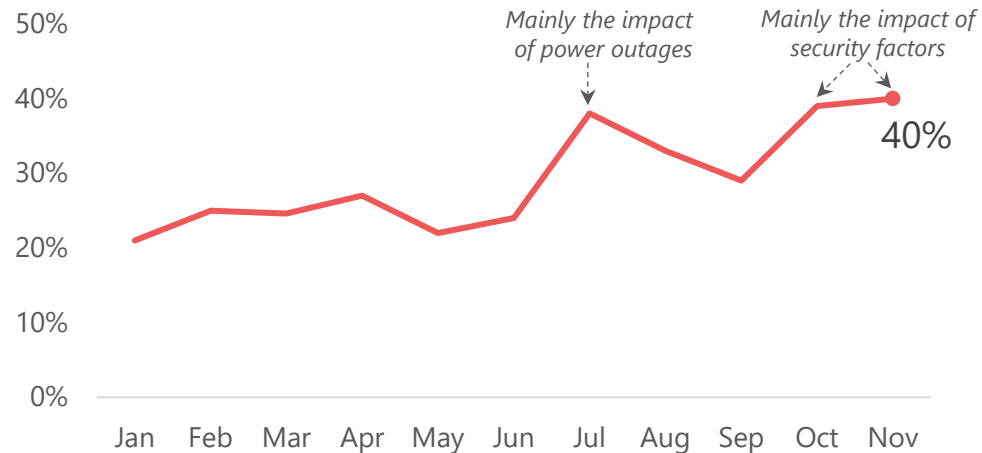
\* Respondents could select more than one option.

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

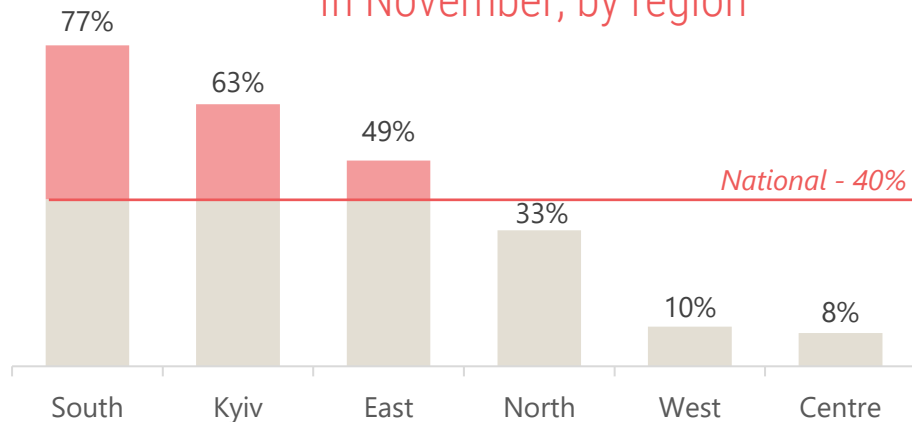
# Accessibility of stores and markets

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

Nationally



In November, by region



Main physical barriers\* to accessing stores or marketplaces reported by customer KIs in November (N=205)



Active fighting or shelling

**100%** Donetska  
**73%** Khersonska  
**40%** Zaporizka



Feeling unsafe due to fear of being targeted

**80%** Donetska  
**33%** Khersonska  
**28%** Zaporizka  
**27%** Kharkivska



Movement restrictions

**90%** Donetska  
**63%** Khersonska  
**29%** Kharkivska



Buildings or infrastructure have been damaged

**100%** Donetska  
**24%** Mykolaivska  
**23%** Khersonska



Damage or blockages on roads

**30%** Donetska  
**24%** Zaporizka



Lack of transportation

**50%** Donetska  
**24%** Zaporizka  
**24%** Mykolaivska



Power outages

**40%** Donetska  
**15%** Khersonska



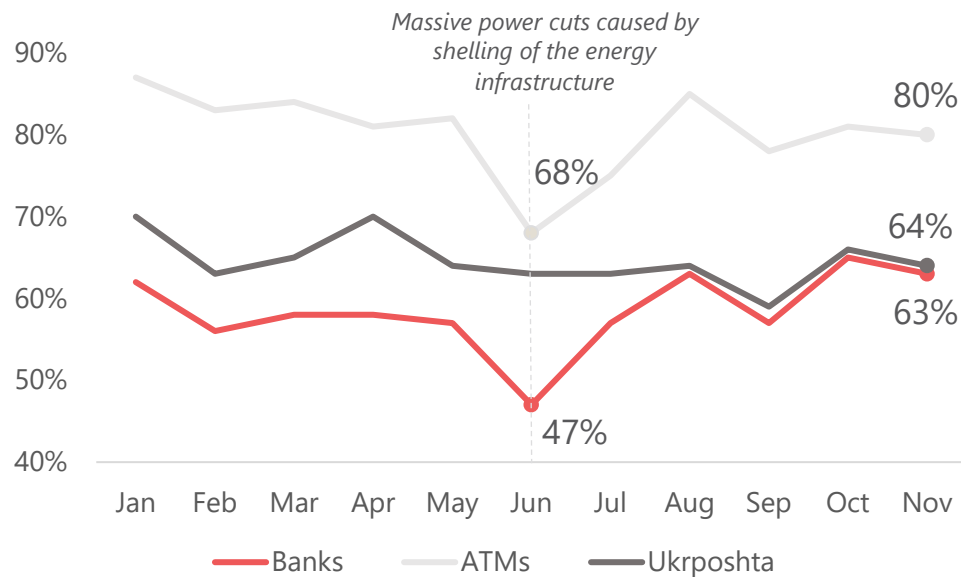
Air alerts

**77%** Chernihivska  
**50%** 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 30% of customer KIs) and Ukrposhta offices (34%) across the country.

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

Bank branches (N=228)

## Unavailable

50% Donetsk  
29% Mykolaivska  
23% Kharkivska

## Accessible only nearby

45% Kyivska  
35% Khersonska  
16% Zaporizka

## Power outages

24% Zaporizka  
13% Khersonska  
10% Donetsk

ATMs (N=102)

## No ATM

50% Donetsk  
35% Mykolaivska  
32% Zaporizka

## Limited number

64% Kyivska  
19% Kharkivska  
10% Donetsk

## Power outages

33% Chernihivska  
24% Mykolaivska  
20% Khersonska

Ukrposhta offices (N=188)

## Unavailable

10% Donetsk

## Irregular operation:

several days a week  
32% Zaporizka  
several days a month  
29% Mykolaivska

## Power outages

22% Dnipropetrovka  
13% Khersonska

\* Respondents could select more than one option.



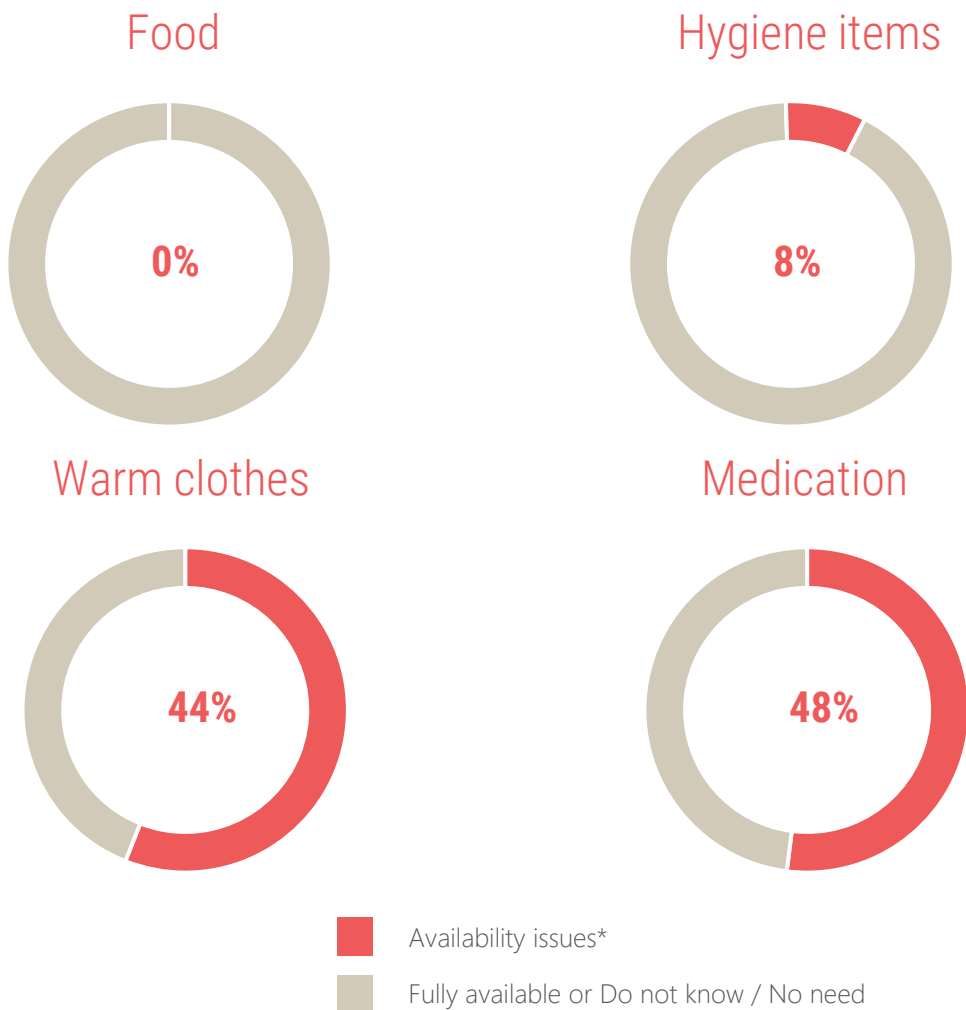
04

Focus on Zaporizkyi raion

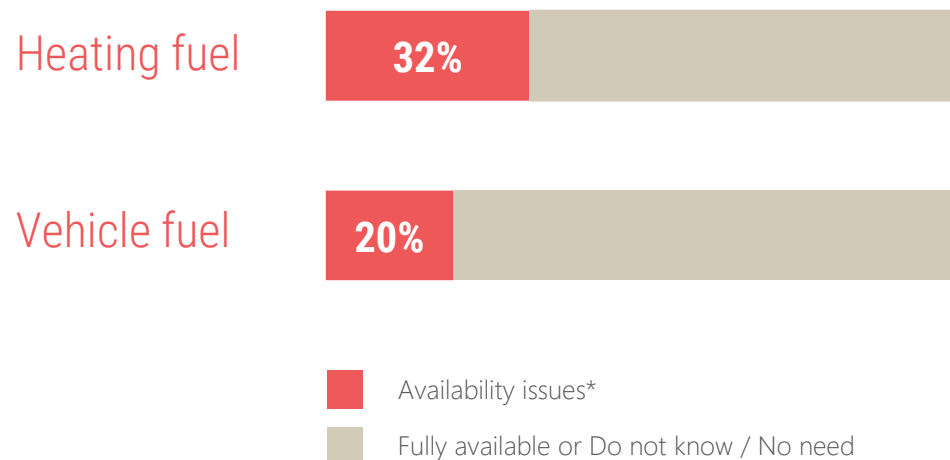
# Zaporizkyi raion

## Availability of essential items and fuels

% of customer KIs reporting availability issues\* with:



% of customer KIs reporting availability issues\* with fuels



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

**Note.** On this slide, as well as on the following three, data is provided on Vilnianska, Zaporizka, Novomykolaivska, Stepnenska, and Shyroktivska hromadas in Zaporizkyi raion of Zaporizka oblast (N = 25 for customers and N=19 for retailers).

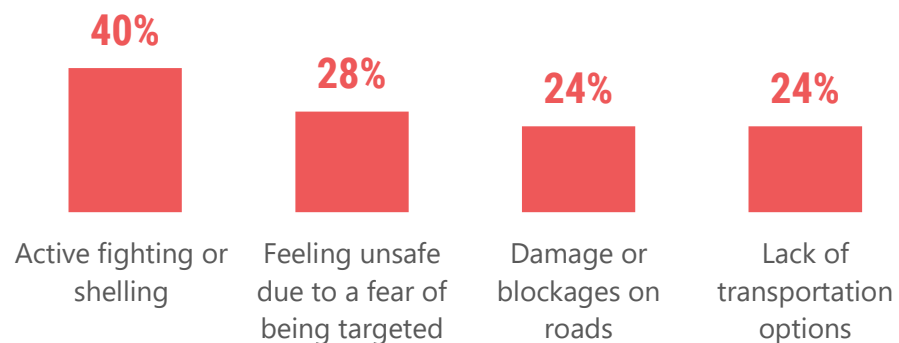


# Zaporizkyi raion

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

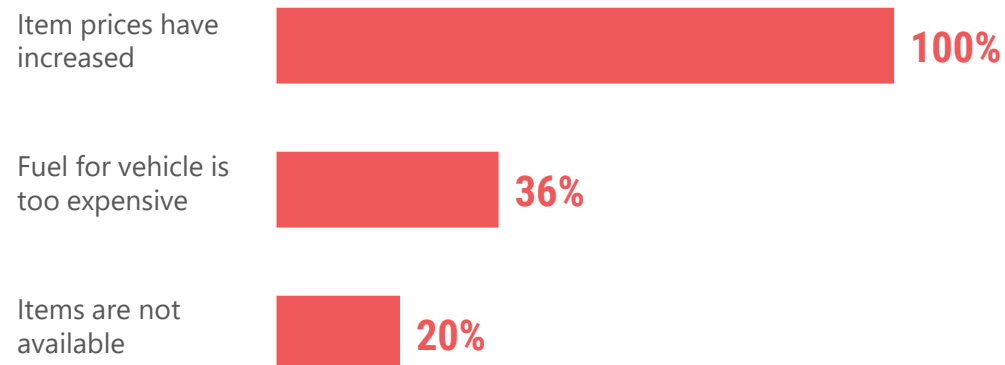
**60%** of customer KIs reported that the full-scale war was affecting their ability to physically access stores or marketplaces

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



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

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

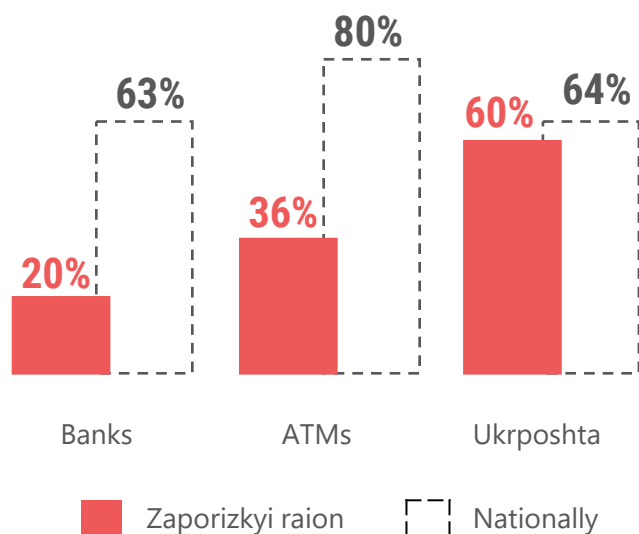


\* Respondents could select more than one option.

# Zaporizkyi raion

## Accessibility of financial services

% of customer KIs reporting full availability of functioning financial services



Main barriers to accessing bank branches reported by customer KIs

- 1 **Air alerts**
- 3 **Unavailability**  
Stepnenska hromada (n=5/5)  
Shyrokivska hromada (n=4/5)

- 2 **Power outages**

Main barriers to accessing ATMs reported by customer KIs

- 1 **No ATM**  
Stepnenska hromada (n=5/5)  
Shyrokivska hromada (n=3/5)

- 2 **Power outages**

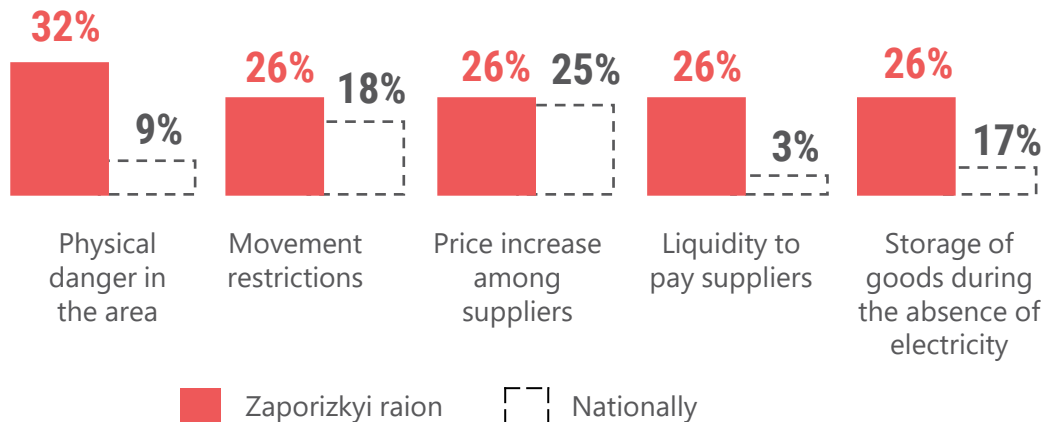
- 3 **Technical issues or other problems**

# Zaporizkyi raion

## Market functionality

**53%** 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



**79%** 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 mobility of customers
- 3 Reduced purchasing power of customers  
Reduced availability of cash

\* Respondents could select more than one option.

# Thank you for your attention



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

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