



Joint Market Monitoring Initiative (JMMI) July 2025

REACH Ukraine

REACH Informing
more effective
humanitarian action

IMPACT Shaping practices
Influencing policies
Impacting lives
REACH PANDA AGORA



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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 July 2025



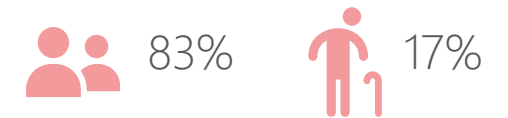
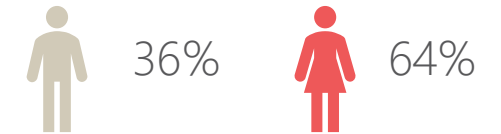
9 Participating partners

15 Assessed oblasts

54 Assessed hromadas

442 Key informant interviews (KIIs)

258 customers surveyed



184 retailers surveyed

20 Commodities assessed

Partners



acted



КАПІТАС
УКРАЇНИ



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02

Key findings

Key findings



After reaching its peak in May, the cost of the JMMI basket continues to decrease and amounted to 1,215 UAH in July, which is 4% lower compared to June and 10% lower compared to May. **This is mainly due to the reduction in the cost of the JMMI basket food component**, which decreased by 9% and 12% compared to June and May, respectively.



Financial service providers continue to deliver services at a sufficient level; however, **air alarms had an increasing impact on the continuous and full operation of banks**, as reported by 41% of Customer KIs in July.



In July, **the availability of food, hygiene items, and medication noticeably improved** in the assessed hromadas and reached the highest levels in the past 12 months. Overall, full availability of these product groups was reported by 100%, 98%, and 93% of Customer KIs, respectively.



The *annual* consumer price index in July (+14.1%) shows a decrease compared to the previous months (+14.3% in June and +15.9% in May). Meanwhile, **the monthly consumer price index showed a decline in prices for the first time since August 2024**.

Accordingly, in July 2025, the consumer price index decreased by 0.2% compared to the previous month, and prices in the food and non-alcoholic beverages group fell by 0.8%, respectively.

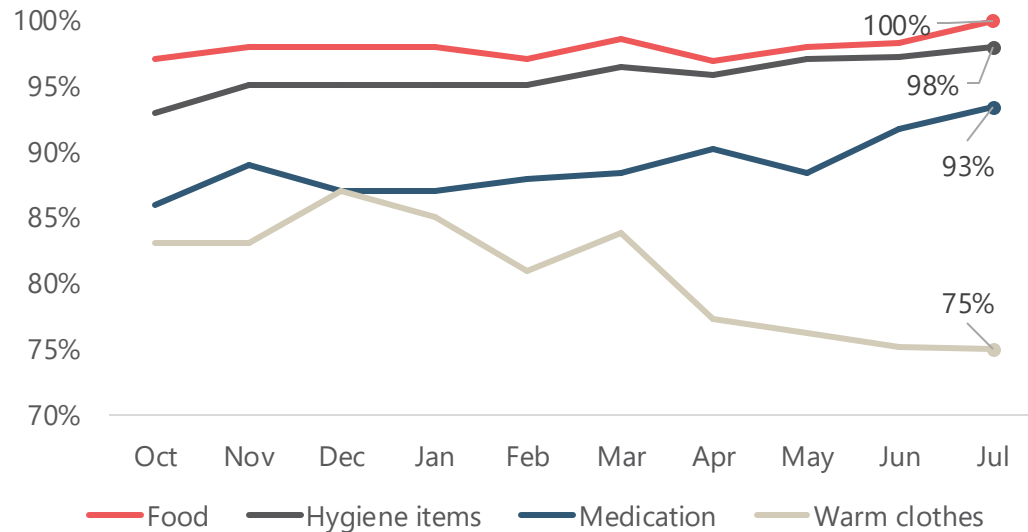
A world map is shown in a light gray, semi-transparent style, overlaid on a background of a light gray geometric pattern consisting of interconnected lines forming various polygons. The map is centered on the Atlantic Ocean. In the center of the map, the number '03' is displayed in a bold, red, sans-serif font.

03

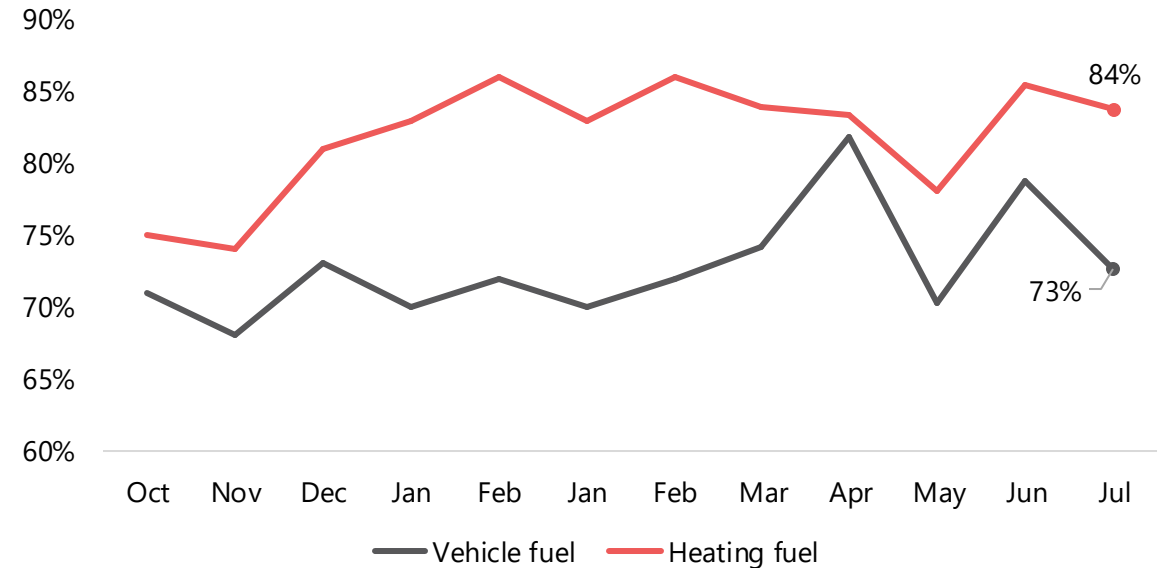
Market and inflation overview

Availability of goods and fuel

% of customer KIs reporting full availability of essential items, overall



% of customer KIs reporting full availability of fuels, overall



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

Warm clothes
Shyroktivska (Zaporizka) Stepnenska (Zaporizka) Sakhnovshchynska (Kharkivska) Pervomaiska (Kharkivska) Lozivska (Kharkivska)

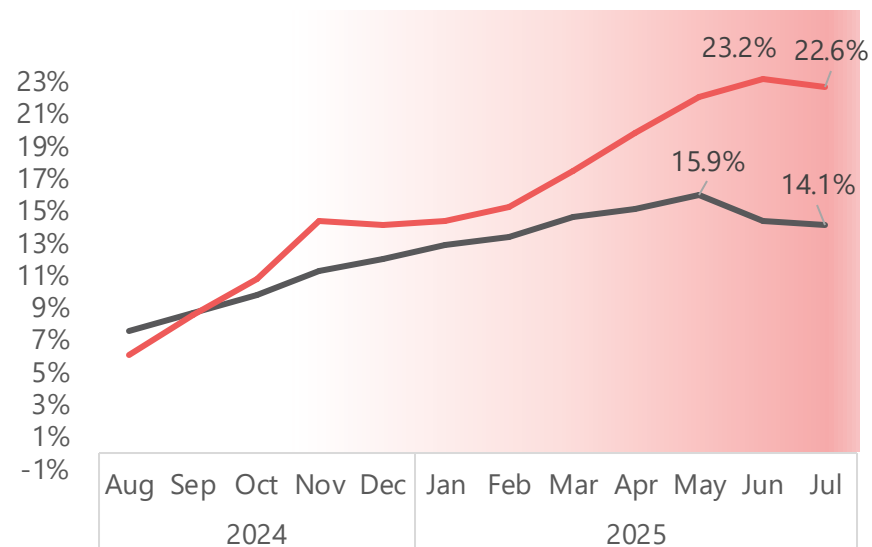
Medication
Berezhnevatska (Mykolaivska)

Heating fuel
Borozenska (Khersonska) Novovorontsovka (Khersonska) Berezhnevatska (Mykolaivska)

Vehicle fuel
Shyroktivska (Zaporizka) Stepnenska (Zaporizka) Borozenska (Khersonska)

Prices to change

Annual inflation rate*, %



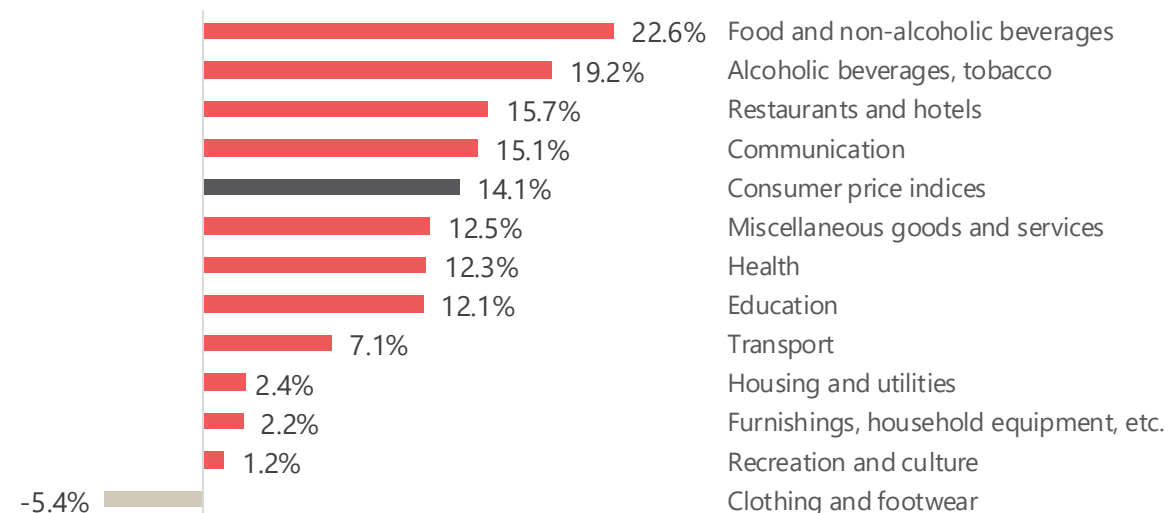
— Consumer price indices — Food and non-alcoholic beverages

Source: SSSU

Eggs, fruit and edible oil increased the most annually (by 82.4%, 52.1% and 30.4% respectively).

Inflation peaked in May, as expected, and went back to declining in June (14.3% yoy). At the same time, it was higher than forecast – primarily due to the impact of unfavorable weather conditions on supply of food products. On the other hand, core inflation decreased (to 12.1%) somewhat faster than forecast. The still-high underlying price pressure reflected the effects from a rapid rise in food prices and businesses' significant expenses on raw materials and wages. **

Consumer price changes (%) for groups of goods and services, from July 2024 to July 2025



Source: SSSU

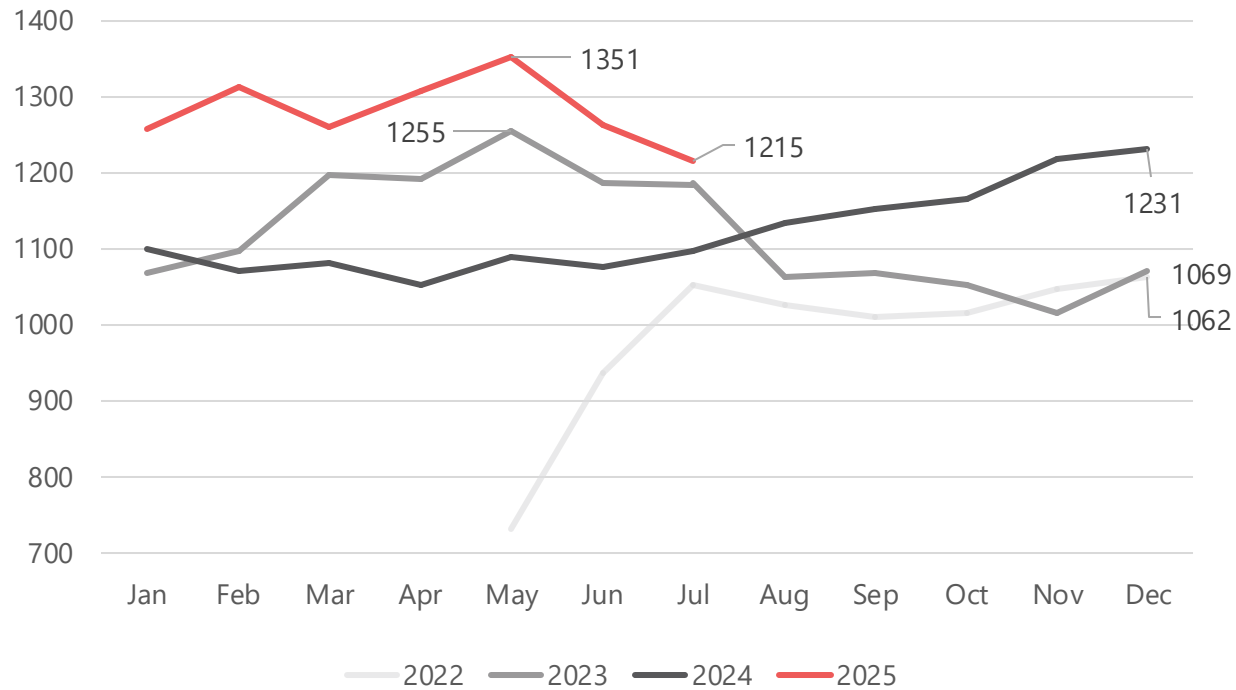
Monthly inflation* showed a decline in prices for the first time since August 2024. Accordingly, in July 2025, the **consumer price index fell** by 0.2% compared to the previous month, and prices in the food and non-alcoholic beverages group fell by 1.1% respectively.

* 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, [Inflation report, July 2025](#).

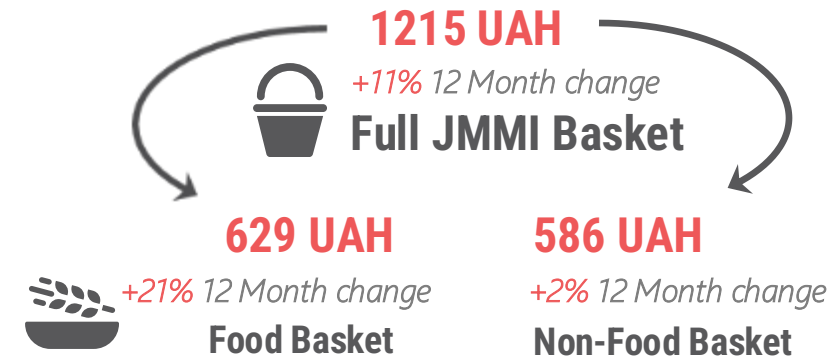
Prices for items in the JMMI basket

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



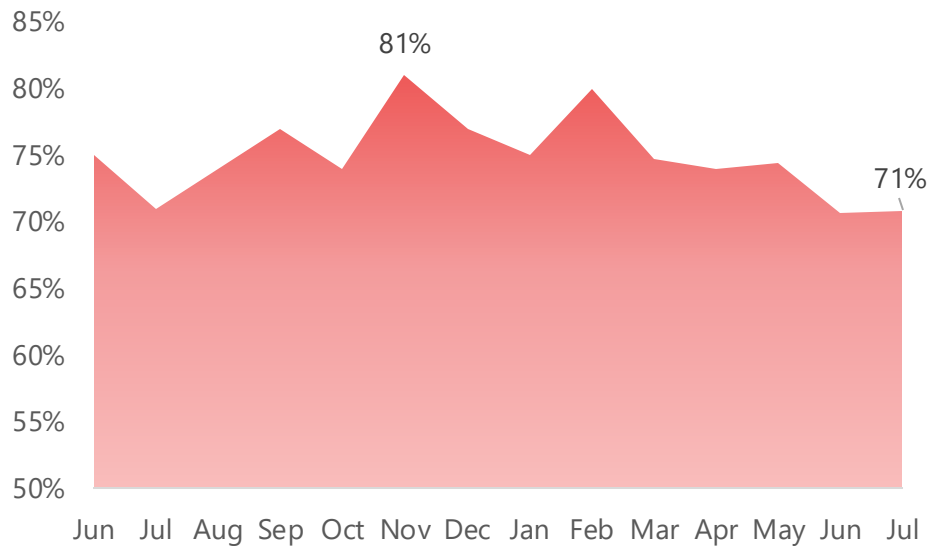
In July 2025, the highest cost of the full JMMI basket was observed in the South (1324)

JMMI basket in July



Financial factors

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



87% of customer KIs aged 60 and above reported that financial factors affected their access to goods in stores or marketplaces in July.

% of customer KIs reporting that financial factors* affected their access to goods in stores or marketplaces in May, 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	59%	71%	66%	52%	81%	54%
Fuel for vehicle is too expensive	25%	5%	14%	33%	30%	18%
Public transportation is too expensive	8%	16%	12%	4%	5%	11%
Cannot afford the items (despite prices have not risen)	12%	21%	13%	11%	19%	10%
Items are not available	3%	3%	4%	-	5%	2%
Do not have enough physical cash	2%	-	1%	1%	3%	1%

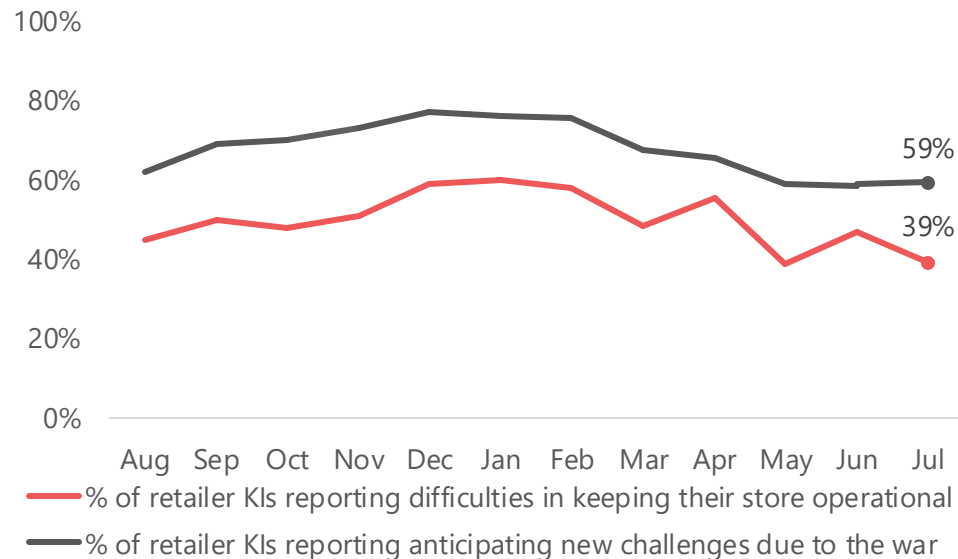


Price increase was reported as the main financial barrier to accessing goods by 79% of customer KIs in the South and 73% in the Center.

* 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 2 difficulties* faced by retailer KIs in keeping their store operational and well-stocked due to the war in July

- 1 **18%** Movement restrictions *The highest value of the indicator was in the North (42%)*
- 2 **14%** Prices charged by suppliers

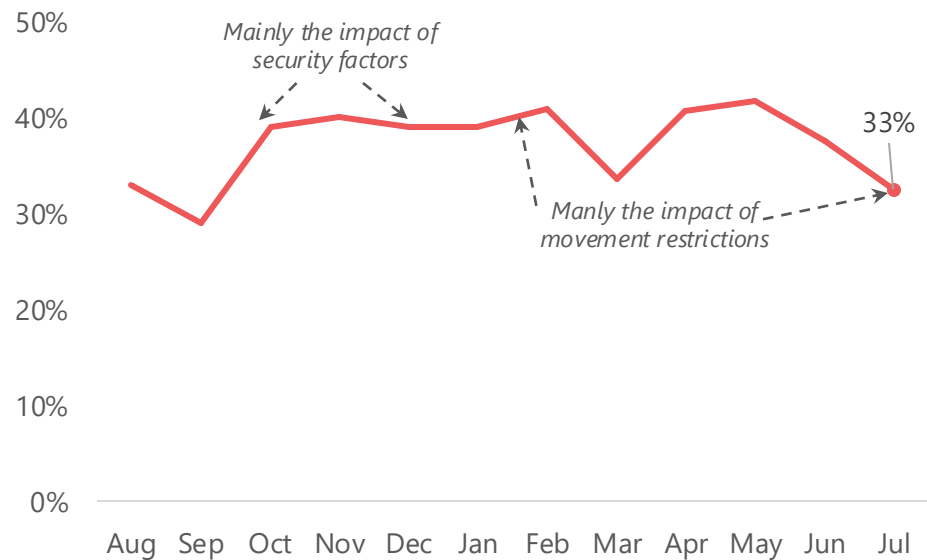
Top 2 challenges* retailer KIs expected to face in the coming months due to the war in July

- 1 **49%** Rising prices
- 2 **27%** 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 July



Active fighting or shelling
100% Donetska
53% Khersonska
23% Chernihivska



Feeling unsafe due to fear of being targeted
100% Donetska
53% Khersonska



Movement restrictions
56% Kyivska
47% Khersonska
42% Chernihivska



Buildings or infrastructure have been damaged
60% Donetska
47% Khersonska



Damage or blockages on roads
53% Khersonska
40% Donetska



Lack of transportation
60% Donetska
42% Mykolaivska
27% Khersonska



Power outages
53% Khersonska
40% Donetska

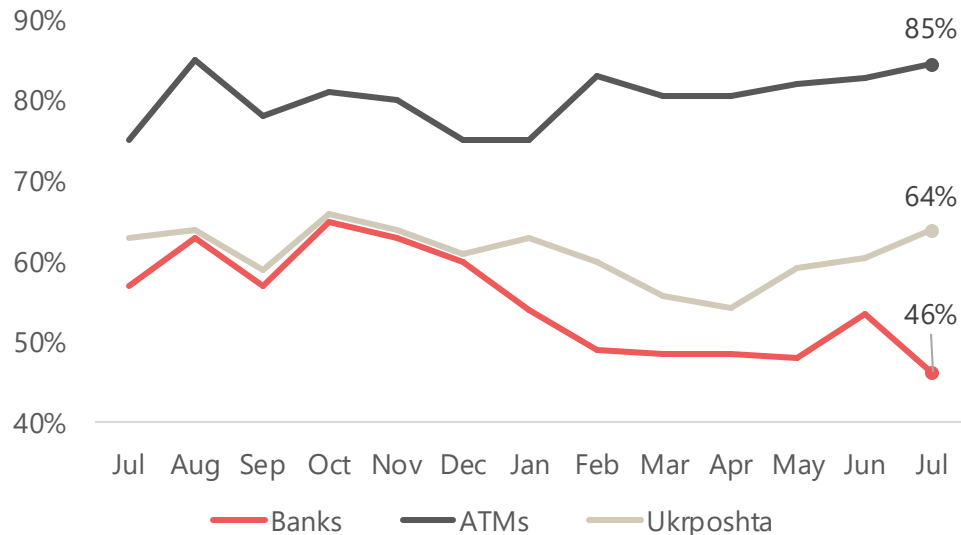


Air alerts
47% Khersonska
40% Donetska

* Respondents could select more than one option.

Accessibility of financial services

% of customer KIs reported full availability of financial services, overall



Air alerts restricted the opening hours of bank branches (reported by 41% of customer KIs) and Ukrposhta offices (22%) across the country.

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

Bank branches

Unavailable
67% Zaporizka
67% Khersonska

Air alerts
100% Sumska
68% Dnipropetrovska
48% Chernihivska

Accessible only nearby
42% Mykolaivska

ATMs

No ATM
67% Zaporizka
50% Mykolaivska
33% Khersonska

Power outages
80% Donetska
13% Khersonska

Limited number of ATMs
16% Chernihivska
13% Khersonska

Ukrposhta offices

Only mobile post offices
58% Mykolaivska

Air alerts
100% Vinnytska
40% Kyivska
40% Khersonska

Irregular operation: several days a week
67% Zaporizka
40% Donetska
40% Lvivska

* Respondents could select more than one option.

Thank you for your attention



ievgen.volkovskyi@reach-initiative.org



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