Joint Market Monitoring Initiative (JMMI)
May 2025

REACH Ukraine

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Methodology

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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 May 2025

9 Participating partners

17 Assessed *oblasts*

56 Assessed *hromadas*

485 Key informant interviews (KIIs)

304 customers surveyed

37% 63%

181 retailers surveyed

20 Commodities assessed

Partners

ACTION AGAINST HUNGER

acted

ADRA

КАРІТАС УКРАЇНИ
CARITAS UKRAINE

CORE
Community Organized Relief Effort

INTERNATIONAL RESCUE COMMITTEE

MERCY CORPS

People in Need

Save the Children

Donors

USAID
FROM THE AMERICAN PEOPLE

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

IMPACT
REACH PANDA AGORA

CENTER FOR CIVILIANS IN CONFLICT

Co-funded by the European Union

02

Key findings

Key findings

In May, local markets continued to function reliably, effectively meeting the basic needs of the population throughout the country. The share of retailer KIs reporting difficulties in keeping their store operational and anticipating new challenges due to the war decreased slightly to 39% and 59%, respectively.

The share of customer KIs reporting difficulties in accessing stores remains moderately high, with 42% of respondents reporting such difficulties. The greatest difficulties in accessing stores by customer KIs were predominantly observed in the Donetska and Zaporizka oblasts.

Inflation for consumer goods and services accelerated annually, reaching 15.9% in May, driven largely by further increases in food prices and production costs, including labor costs. At the same time, the **annual increase in prices for food and non-alcoholic beverages reached 22.1%.** Food prices were additionally affected by spring frosts, which impacted the cost of the first batches of fruits and vegetables from the new harvest.

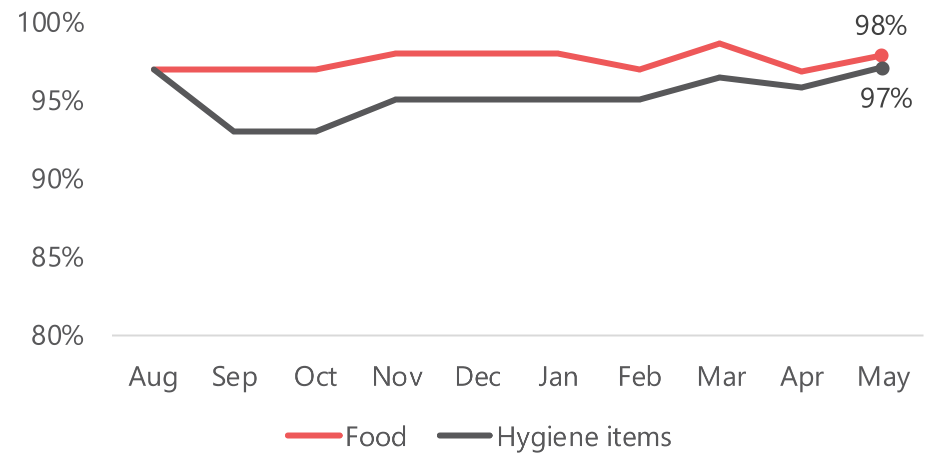
Price increase for the JMMI basket was even higher than official estimates. The overall cost of the JMMI basket increased by 24% year-on-year, while the food component rose by more than 35% year-on-year. Vegetables experienced the most significant price hikes, particularly cabbage (+265%) and carrots (+126%).

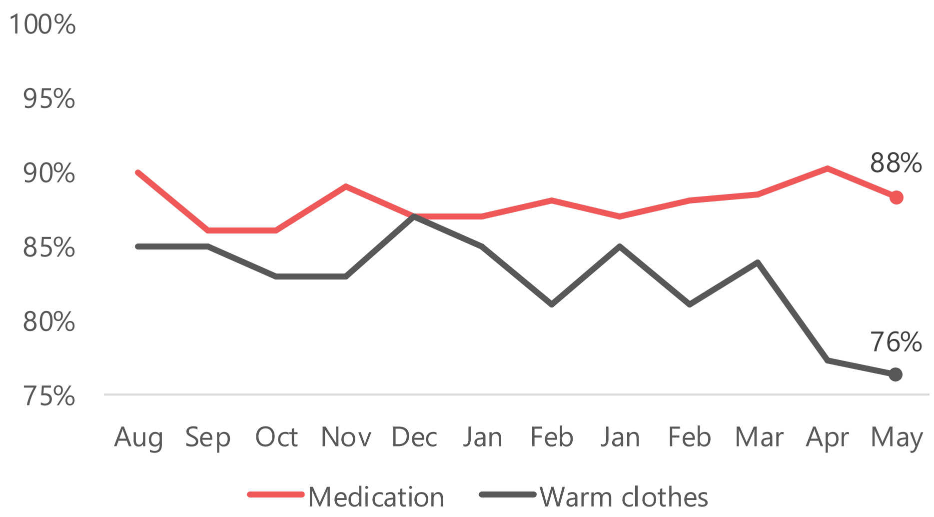
03

Market and inflation 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 May

	Food items	Hygiene items	Warm clothes	Medication
East	1%	2%	38%	15%
South	8%	10%	41%	24%
National	2%	3%	24%	12%

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

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

Food items

Pishchanska (**Dnipropetrovska**)
Bereznehuvatska (**Mykolaivska**)
Kramatorska (**Donetska**)

Hygiene items

Pishchanska (**Dnipropetrovska**)
Bereznehuvatska (**Mykolaivska**)

Warm clothes

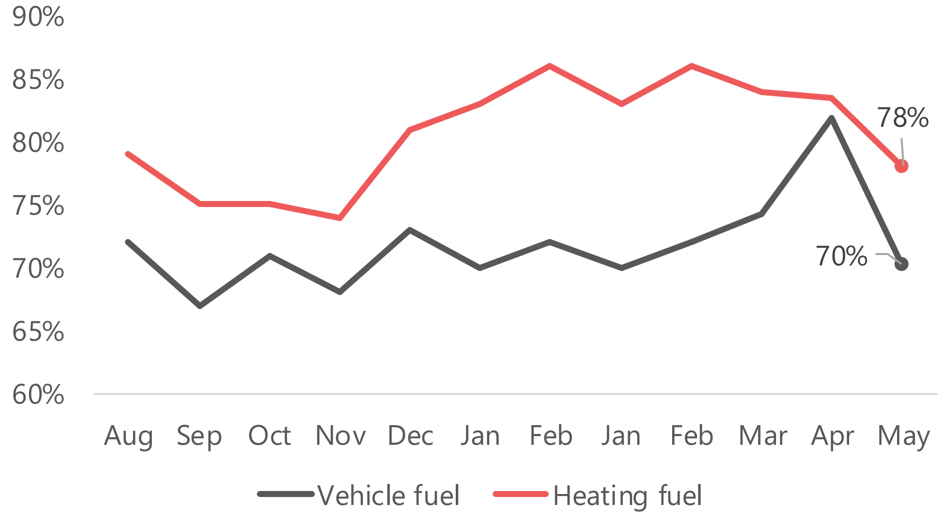
Pishchanska (**Dnipropetrovska**)
Kramatorska (**Donetska**)
Bereznehuvatska (**Mykolaivska**)
Valkivska (**Kharkivska**)
Balakliiska (**Kharkivska**)
Lozivska (**Kharkivska**)

Medication

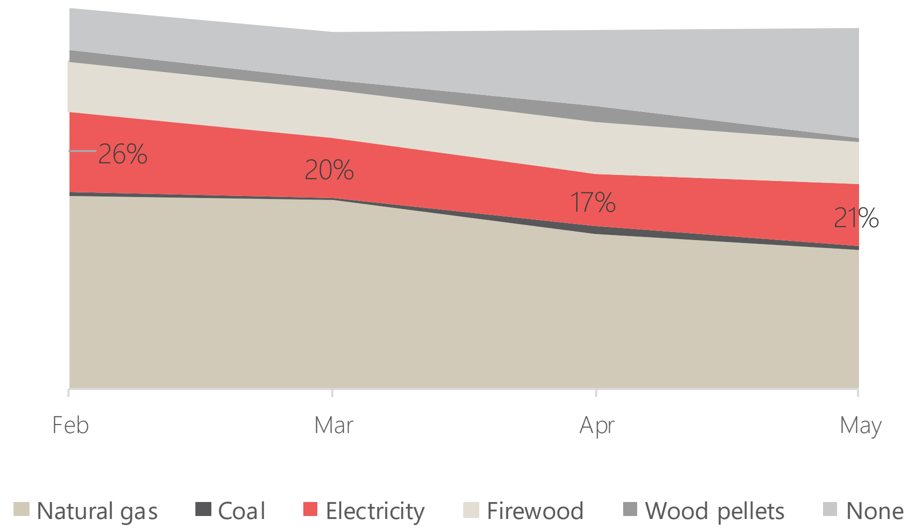
Kramatorska (**Donetska**)
Bereznehuvatska (**Mykolaivska**)
Rohanska (**Kharkivska**)

Availability of fuels

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



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



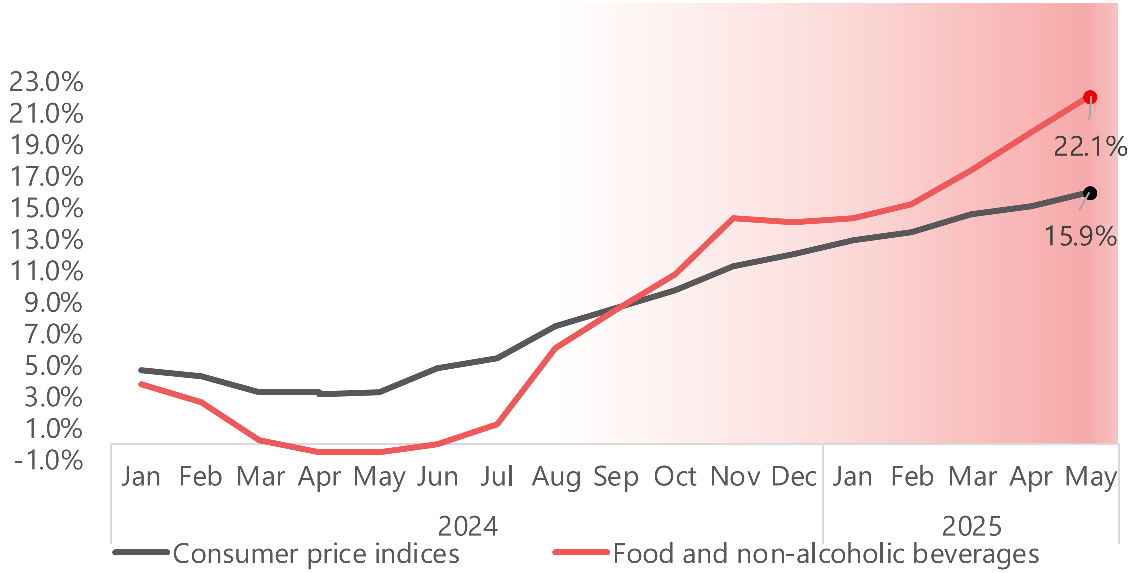
Hromadas in which customer KIs in May reported the greatest level of availability issues of:

Heating fuel	Vehicle fuel
Orikhivska (**Zaporizka**) Bereznehuvatska (**Mykolaivska**)	Kramatorska (**Donetska**) Bereznehuvatska (**Mykolaivska**) Mishkovo-Pohorilivska (**Mykolaivska**) Borozenska (**Khersonska**)

* Respondents could select more than one option.

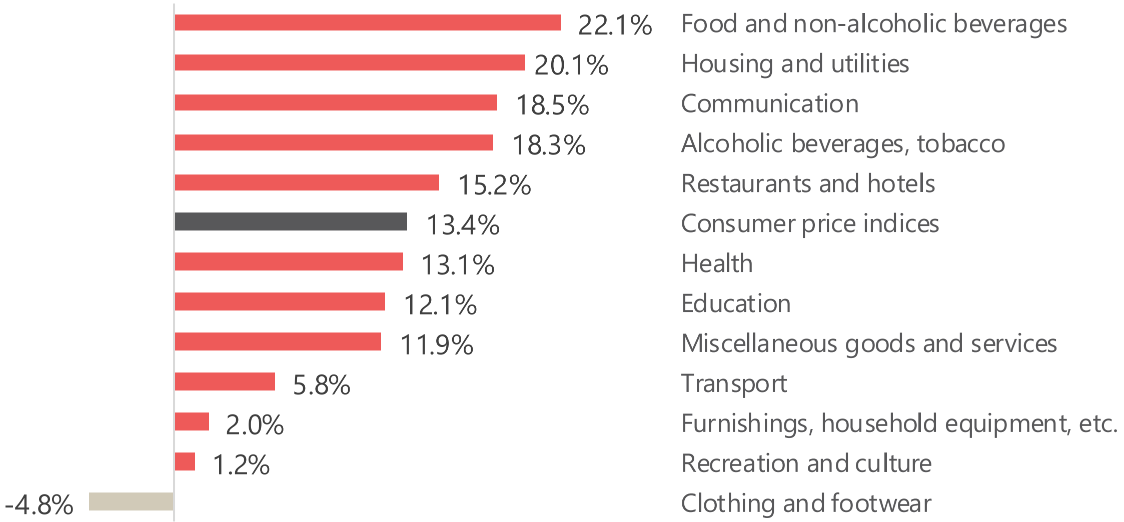
Prices to change

Annual inflation rate*, %



Source: SSSU

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



Source: SSSU

Eggs, electricity, vegetable, edible oil and fruit prices increased the most annually (by 86%, 63,6%, 35,7%, 35,4% and 33.5% respectively).

*In April, consumer inflation accelerated as expected (to 15.1% yoy). The NBU's preliminary estimates suggest that annual inflation will continue to rise in May, likely reaching a local maximum and slightly exceeding the current forecast trajectory. Food prices were additionally affected by spring frosts, which impacted the cost of the first batches of fruits and vegetables from the new harvest. On the other hand, after a slowdown in core inflation in April, its expected acceleration in May was in line with the NBU's forecast***

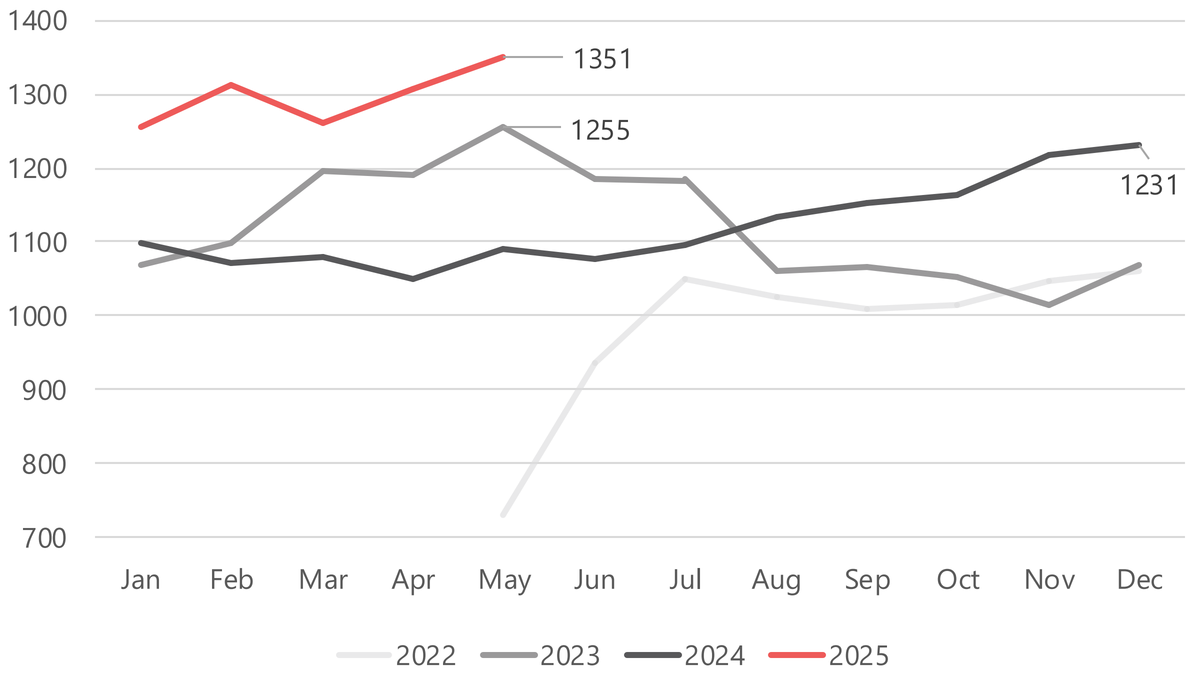
Monthly inflation* accelerated to 1.3% in May compared to 0.7% in April. Prices for food and non-alcoholic beverages increased by 2.8% in May.

** 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, 5 Jun 2025.*

Prices for items in the JMMI basket

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



In May 2025, the highest cost of the full JMMI basket was observed in the South (1596)

JMMI basket in May

1351 UAH
+24% 12 Month change
Full JMMI Basket

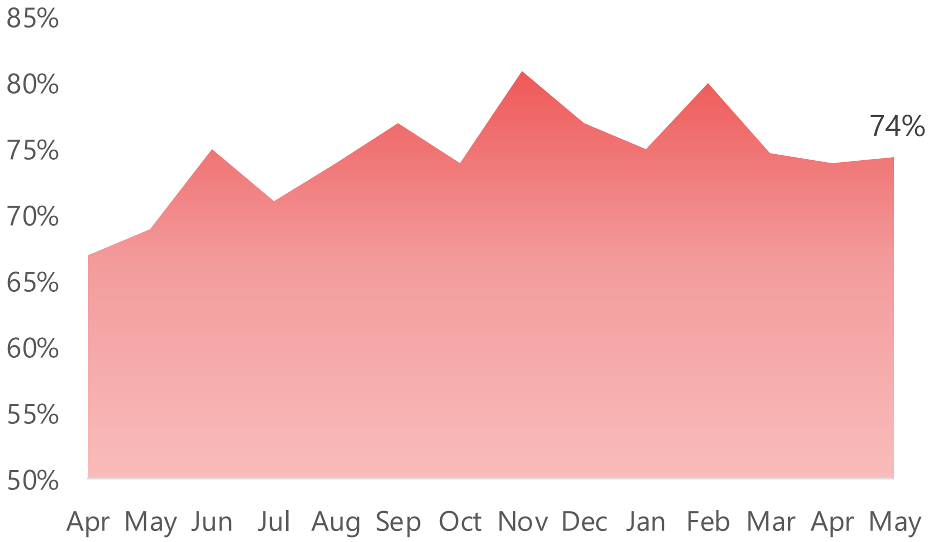
711 UAH
+35% 12 Month change
Food Basket

640 UAH
+14% 12 Month change
Non-Food Basket
NFI

JMMI basket in May, by type of area

Affordability

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



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

% of customers 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

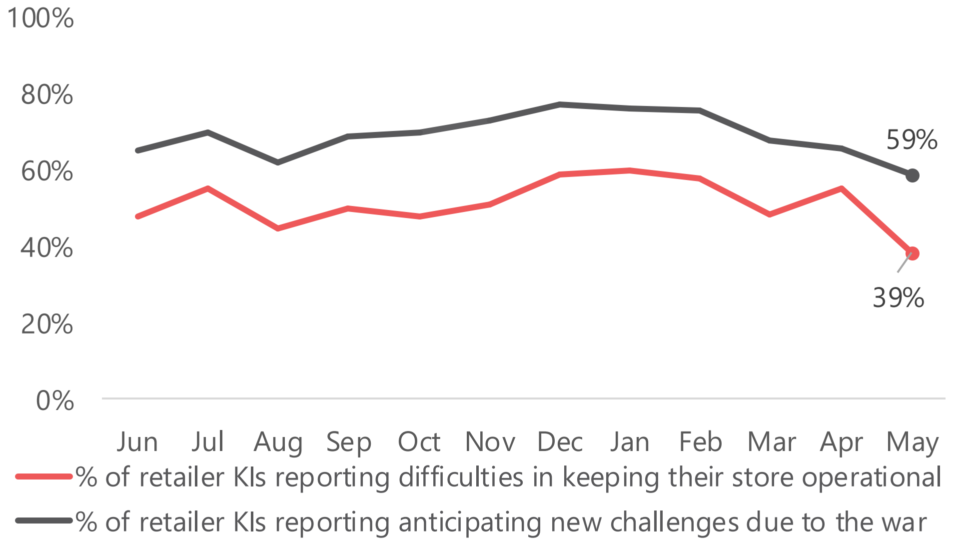
Reported financial barrier	18-59 years old	60 years and above	Women	Men	Rural	Urban
Item price have increased	61%	76%	69%	55%	80%	53%
Fuel for vehicle is too expensive	26%	9%	14%	38%	25%	21%
Public transportation is too expensive	11%	29%	21%	6%	23%	10%
Cannot afford the items (despite prices have not risen)	13%	19%	14%	13%	11%	15%
Items are not available	1%	6%	3%	1%	3%	2%
Do not have enough physical cash	1%	-	1%	-	-	1%

Price increase was reported as the main financial barrier to accessing goods by 75% of customer KIs in the Cneter and 73% in the East.

* 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 May

1. **17%** Movement restrictions — *The highest value of the indicator was in the North (57%)*
2. **16%** Prices charged by suppliers

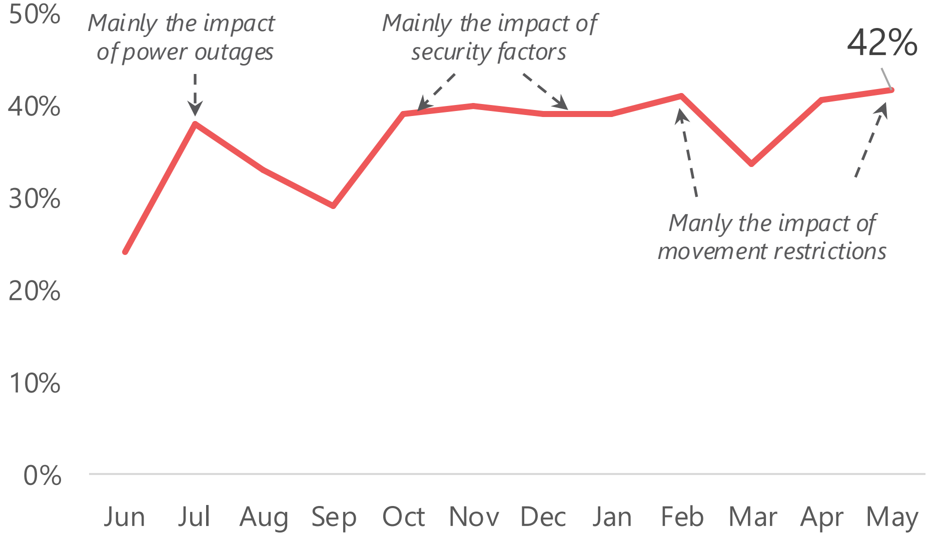
Top 2 challenges* retailer KIs expected to face in the coming months due to the war in May

1. **48%** Rising prices
2. **33%** 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 May

Active fighting or shelling
100% Donetska
43% Zaporizka
31% Chernihivska

Feeling unsafe due to fear of being targeted
60% Donetska
50% Khersonska
24% Zaporizka

Movement restrictions
100% Chernihivska
69% Khersonska

Buildings or infrastructure have been damaged
40% Donetska
29% Zaporizka

Damage or blockages on roads
29% Zaporizka
10% Chernihivska

Lack of transportation
33% Mykolaivska
20% Donetska
19% Zaporizka

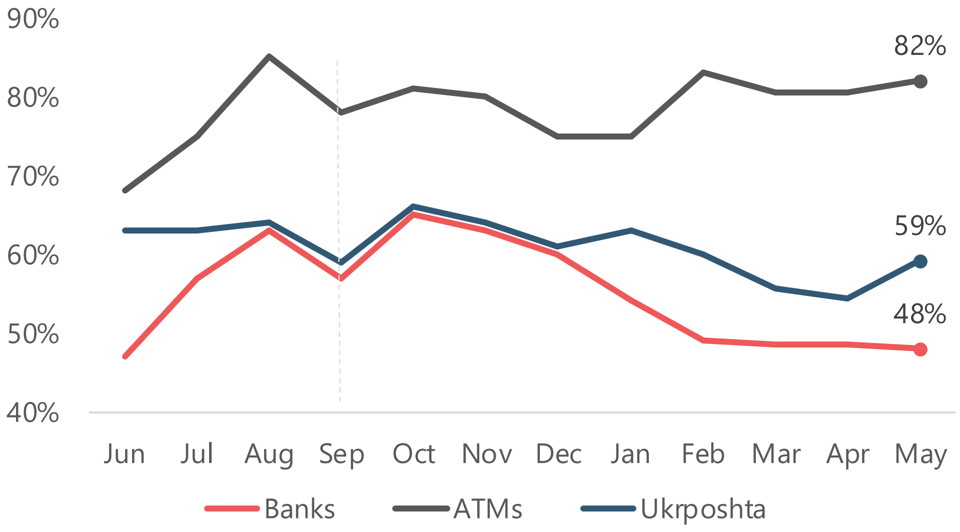
Power outages
60% Donetska
25% Khersonska

Air alerts
56% Khersonska
50% Mykolaivska
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 (27%) across the country.

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

Bank branches

Air allerts
67% Sumska
60% Dnipropetrovska

Unavailable
43% Kharkivska
43% Zaporizka
33% Khersonska

Accessible only nearby
39% Kharkivska
33% Mykolaivska

ATMs

No ATM
52% Zaporizka
50% Mykolaivska
31% Khersonska

Power outages
20% Donetska
17% Dnipropetrovska

No cash
40% Donetska

Ukrposhta offices

Air allerts
70% Kyivska
70% Chernihivska
50% Dnipropetrovska

Irregular operation: several days a week
48% Zaporizka
17% Dnipropetrovska

Only mobile post offices
58% Mykolaivska
13% Khersonska

* Respondents could select more than one option.

Thank you for your attention

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