Ukraine | Joint Market Monitoring Initiative (JMMI)

MARKET OVERVIEW

10 - 20 March 2024

INTRODUCTION

Since 24 February 2022, the full-scale war across Ukraine has prompted mass displacement and humanitarian crisis. Given the prominence of multi-purpose cash as a modality for assistance, market monitoring is a key initiative to ensure humanitarian intervention is effective, sustainable and does not harm local markets.

Due to the ongoing full-scale war in Ukraine, humanitarian market data is limited and incomplete, especially from conflict-affected areas. The Joint Market Monitoring Initiative (JMMI) seeks to fill this information gap by providing useful and timely data on price trends and market functionality indicators.

Marketplaces across Ukraine are assessed on a monthly basis. In each location, field teams record prices and other market indicators through retailer and customer key informants (KIs) interviews that characterize monthly changes in the local markets.

The goal of the JMMI is to: track prices and availability of basic commodities in Ukraine markets on a monthly basis; assess the impact of the current humanitarian crisis on market systems in Ukraine; contribute to a broader understanding of the market environment in Ukraine for the benefit of humanitarian actors across all sectors.

ASSESSMENT COVERAGE

KEY FINDINGS

- **The issue of affordability has become increasingly pressing nationwide, with one in four surveyed customers unable to afford the goods available in stores, and 59% considering higher prices as the main financial constraint to accessing goods. Financial barriers were more frequently reported in the East, South, and North. Given the lower household income reported in these areas,** this may indicate a decrease in the coping capacity of the population, especially in the areas with heightened security concerns.
- Essential items and financial services remained accessible in most parts of the country. However, **the situation appeared to vary in the East and South, particularly in Donetska, Kharkivska, Khersonska, and Zaporizka oblasts. Customer KIs in these regions reportedly experienced challenges regarding the availability of food, hygiene items, medication, and warm clothes, alongside difficulties due to the inaccessibility of functioning bank branches, ATMs, and Ukrposhta offices.**
- Multi-purpose cash assistance could still be relevant for most of the country, in terms of humanitarian response. However, **a differentiated approach to aid selection, whether cash or in-kind assistance, may be necessary in Donetska, Kharkivska, Khersonska, Zaporizka, and Mykolaivska oblasts, given the worst situation with the availability of essential items in these oblasts and limited access to financial providers that could be involved in the delivery of cash assistance.** Furthermore, ongoing monitoring of the market situation is essential in these regions and the North due to deteriorating security conditions.

KEY INDICATORS

Key Monthly Changes In JMMI Basket

Median cost of overall JMMI basket

1079 UAH	▲ +0.8%
27.87 USD	▼ -0.7%
25.51 EUR	▼ -2.0%

Food items	**Hygiene items**
▼ -1.9%	▲ +3.3%

Median Cost Of JMMI Basket By Region

West	1136 UAH	+3.0% ▲
East[1]	1118 UAH	+6.8% ▲
North	1119 UAH	-5.2% ▼
Kyiv	1095 UAH	+3.2% ▲
Centre	1046 UAH	+2.1% ▲
South	1007 UAH	-10.7% ▼

[1] East includes Kharkivska, Luhanska, and Donetska oblasts.

Exchange Rates**

38.69	38.73	42.30
USD/UAH	**USD/UAH**	**EUR/UAH**
official	*parallel market*	*parallel market*
▲ +1.3%	▲ +1.5%	▲ +2.8%

** Median exchange rate on March 15, 2024. Data available at http://minfin.com.ua.

12	Participating partners
22	Assessed *oblasts*
99	Assessed *hromadas*
940	Key informant interviews (KIIs)
412	Retailers surveyed
528	Customers surveyed
20	Commodities assessed

REACH Informing more effective humanitarian action

JMMI BASKET

The JMMI basket is a subset of the 335-item set of consumer goods (and services) maintained by the State Statistics Service of Ukraine (SSSU), focusing on core food and hygiene items that an average household must purchase regularly. The JMMI basket was defined in consultation with the Ukraine Cash Working Group (CWG).

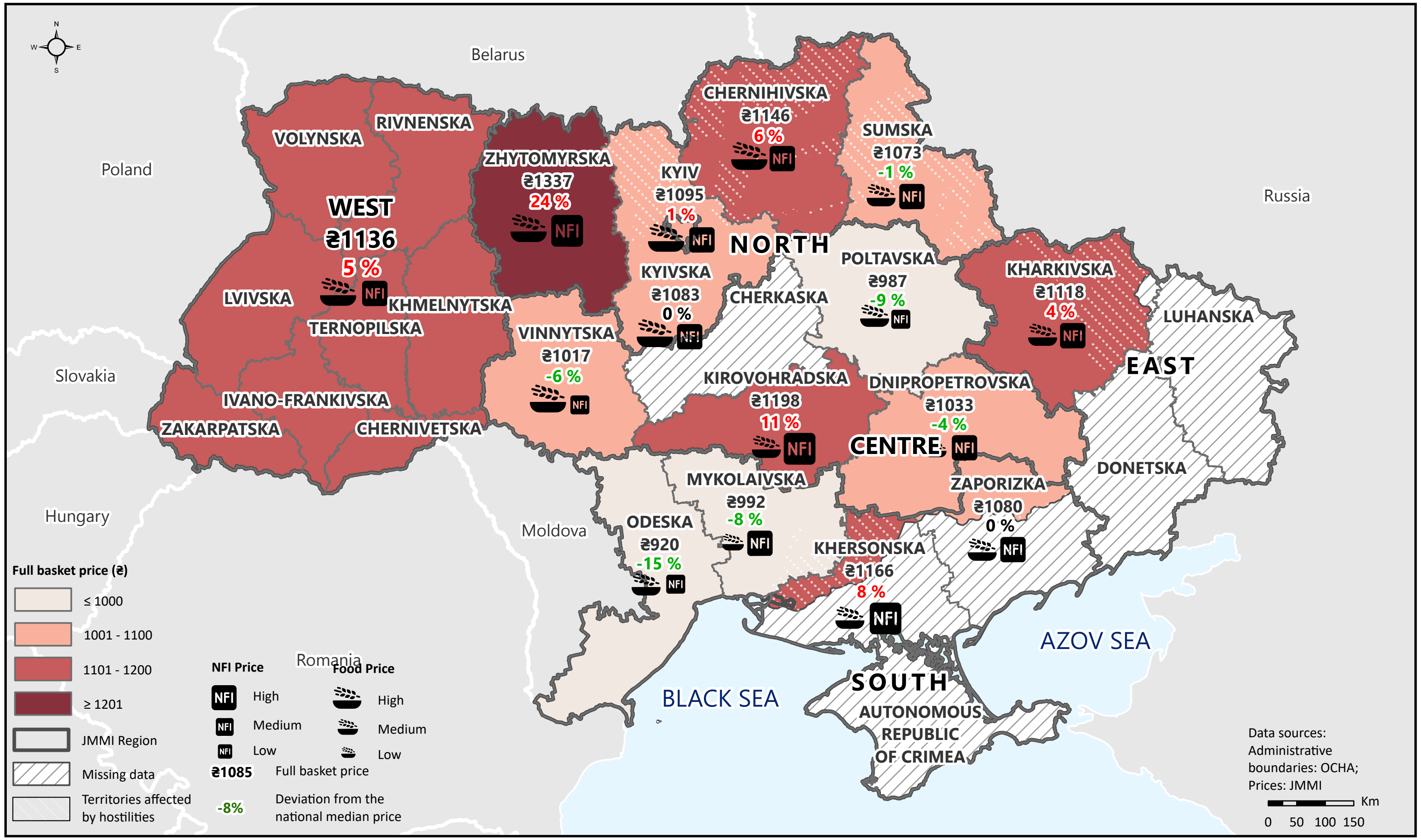
Food Items

Bread	500 g
Buckwheat	1 kg
Cabbage	1 kg
Carrots	1 kg
Chicken (legs)	1 kg
Complementary cereal for babies	200 g
Drinking water	1 bottle (1.5 L)
Eggs (chicken)	10 pcs
Milk (2.5%)	900 mL
Oil (sunflower)	900 mL
Onion	1 kg
Potato	1 kg
Rice (round)	1 kg
Wheat flour (white)	1 kg

Non-Food Items

Body soap	1 bar (75 g)
Diapers (infant, size 3)	1 pack (40-60 pcs)
Hygiene/sanitary pads	1 pack (10 pcs)
Laundry soap	1 bar (200 g)
Toothpaste	1 tube (75 ml)
Washing powder (machine)	1 box (500 g)

Map 2: Median prices (UAH) of food and non-food baskets in March 2024, by oblast



515 UAH

Median cost of the food basket

564 UAH

Median cost of the non-food (hygiene) basket

JMMI basket primary trends

- The cost of the full JMMI basket calculated at the national level amounted to 1,079 UAH in March 2024, a 1% increase compared to the prices reported in February 2024, and a 10% decrease compared to March 2023.
- The most expensive JMMI basket was calculated based on prices reported in the West (1136 UAH), followed by the North (1119 UAH) and East (1118 UAH), whereas JMMI basket prices were reported to be the lowest in the South (1007 UAH).
- The decrease in the cost of the full JMMI basket in March compared to the same month of the previous year was mainly due to a decrease in prices in the food basket (by 19%), while the cost of the non-food (hygiene) basket remained unchanged over the year.

Table 1: Median prices (UAH) of food basket in March 2024, by region

		West		Centre		South		North		Kyiv		East		National	
Item	**Unit**	**Median Price** in UAH	**Change** since Feb 2024	**Median Price** in UAH	**Change** since Feb 2024	**Median Price** in UAH	**Change** since Feb 2024	**Median Price** in UAH	**Change** since Feb 2024	**Median Price** in UAH	**Change** since Feb 2024	**Median Price** in UAH	**Change** since Feb 2024	**Median Price** in UAH	**Change** since Feb 2024
Bread	500 g	20	0%	17	▼6%	16	▼15%	20	▲24%	22	▼5%	14	▼22%	18	▲1%
Buckwheat	1 kg	27	▼4%	25	▼6%	28	▼14%	27	▼21%	29	▼2%	29	▼5%	28	▼9%
Cabbage	1 kg	15	▼2%	14	▼3%	14	▼6%	14	▼12%	16	0%	15	▲3%	15	▼5%
Carrots	1 kg	13	▼6%	13	▼15%	15	0%	13	▼13%	16	▼5%	12	▼13%	13	▼13%
Chicken (legs, fresh)	1 kg	112	▲3%	108	▲3%	91	▼13%	105	▲1%	125	▼2%	103	▲15%	107	▲2%
Complementary cereal	200 g	110	▲22%	85	▲2%	67	▼7%	95	▼3%	96	▲9%	93	▲14%	94	▲9%
Eggs (chicken)	10 pcs	42	▼16%	42	▼17%	40	▼20%	38	▼24%	40	▼23%	39	▼26%	40	▼21%
Milk (2.5%, fresh)	900 ml	33	0%	34	▲3%	35	▼5%	36	▼1%	34	▲2%	35	▲3%	34	▲1%
Oil (sunflower, refined)	900 ml	48	▲8%	45	▼1%	45	0%	45	▼13%	48	▼2%	45	▼5%	45	▼3%
Onions	1 kg	18	▲1%	16	0%	17	▼3%	16	▼8%	17	▼1%	17	▼12%	17	▼4%
Potatoes	1 kg	22	▼4%	22	▼5%	25	▲2%	23	▲3%	25	0%	23	▼4%	23	▼2%
Rice (round)	1 kg	50	0%	49	▼3%	49	▼7%	50	▼2%	56	▲2%	50	▲3%	50	▼2%
Water	1.5 L	15	▼5%	13	▼12%	13	▼16%	17	0%	14	▲2%	15	▲2%	14	▼5%
Wheat flour (white)	1 kg	18	▼2%	15	▼7%	16	▼12%	17	▲1%	20	0%	16	▲9%	17	▼4%
Total		**541**	▲3%	**497**	▼3%	**472**	▼9%	**517**	▼6%	**559**	▼2%	**507**	▲1%	**515**	▼2%

Table 2: Median prices (UAH) of non-food (hygiene) basket in March 2024, by region

		West		Centre		South		North		Kyiv		East		National	
Item	**Unit**	**Median Price** in UAH	**Change** since Feb 2024	**Median Price** in UAH	**Change** since Feb 2024	**Median Price** in UAH	**Change** since Feb 2024	**Median Price** in UAH	**Change** since Feb 2024	**Median Price** in UAH	**Change** since Feb 2024	**Median Price** in UAH	**Change** since Feb 2024	**Median Price** in UAH	**Change** since Feb 2024
Body soap	1 bar (75 g)	15	▲8%	12	▲3%	14	▼13%	11	▼11%	13	▲4%	12	▲10%	13	▲2%
Diapers (infant, 5-9 kg)	1 pack (40-60 pcs)	414	▲2%	391	▲10%	367	▼17%	440	▼4%	384	▲10%	453	▲25%	402	▲5%
Hygiene/sanitary pads	1 pack (10 pcs)	52	▲14%	44	▲7%	46	▲8%	39	▼5%	40	▲5%	42	▲3%	43	▲4%
Laundry soap	1 bar (200 g)	19	▼18%	20	0%	22	▲3%	21	▼3%	20	▼4%	17	▼11%	20	▼6%
Toothpaste	1 tube (75 ml)	42	▲4%	38	▲5%	33	▼11%	43	▼14%	35	▲7%	39	▼39%	38	▼1%
Washing powder	1 box (500 g)	54	▲9%	43	▼13%	53	▲8%	47	▼3%	44	▲7%	48	▲2%	47	▼3%
Total		**595**	▲3%	**548**	▲7%	**536**	▼12%	**602**	▼5%	**536**	▲9%	**610**	▲12%	**564**	▲3%

Map 3: Median prices (UAH) of food baskets in March 2024, by oblast

PRICES IN JMMI BASKET

In March, the cost of the food basket decreased in most regions, with the most noticeable decline observed in the South (by 9%). Nationally, it amounted to 515 UAH, representing a 2% decrease compared to February. The decrease in prices in the food basket was mainly attributed to declines in the prices of eggs, vegetables, cereals, and flour.

Eggs prices decreased as production increased, driven by second-round effects from significant harvests last year, and as producers temporarily shifted to the domestic market due to the transport blockade[1]. Last year's high harvests also contributed to the fall in prices for flour and cereals, especially buckwheat. Vegetables, such as carrots, cabbage, and onions, also fell in price due to mild winter weather and increased sales of products from storages[1]. An increase in the supply of imported potatoes led to a decrease in potato prices in March[2], although prices remained 2.6 times higher than a year ago.

The cost of the non-food (hygiene) item (NFI) basket amounted to 564 UAH nationwide in March, reflecting a 3% increase compared to February. The most expensive NFI basket was recorded in the East and North, totaling 610 UAH and 602 UAH respectively, while the least expensive, amounting to 536 UAH, was found in the South and Kyiv.

MARKET PRICES

According to the State Statistics Service of Ukraine (SSSU), average consumer prices for vehicle fuel resumed their upward trend[3]. In March, average consumer prices for petrol A-92 and liquefied petroleum gas (LPG) increased by 3% compared to February, while prices for petrol A-95 and diesel rose by 2%.

At the same time, vehicle fuel prices grew more slowly than expected. This was attributed to a more moderate increase in global crude oil prices and a warm winter resulting in less energy demand[4].

Figure 1: Monthly evolution of the JMMI basket price (in UAH), nationally

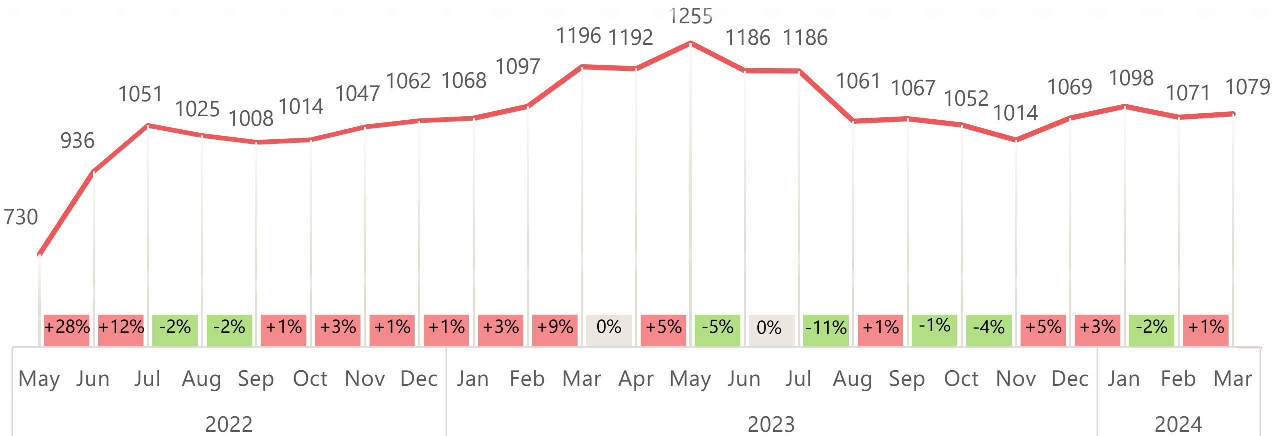
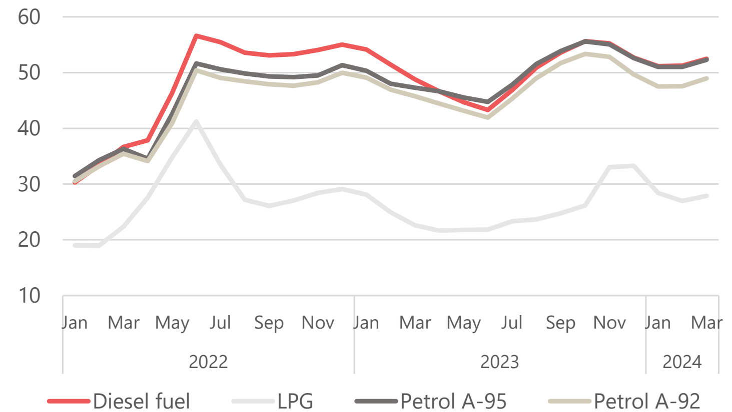
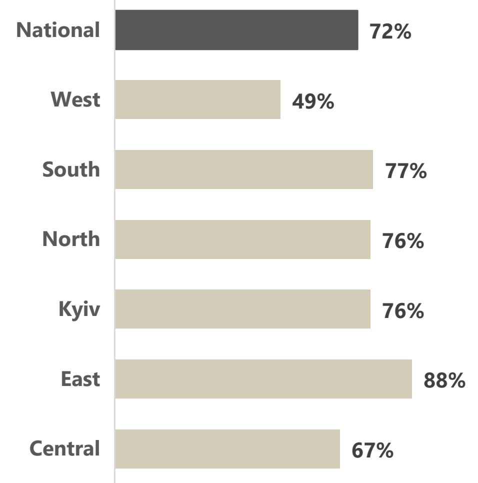


Figure 2: Average consumer price for vehicle fuel (UAH per liter), nationally



Source: SSSU

Figure 3: % of customer KIs reporting that financial factors have affected their access to goods in stores or marketplaces, by region



AFFORDABILITY

JMMI findings continue to highlight persistent financial-related challenges that impact customer KIs' access to goods in stores and marketplaces across the country. The proportion of customer KIs reporting these challenges increased from 67% in February to 72% in March.

Rising prices were cited as the primary reason for financial challenges, mentioned by 59% of customer KIs. The highest percentages were observed in the East (72%), Kyiv (72%), and North (67%).

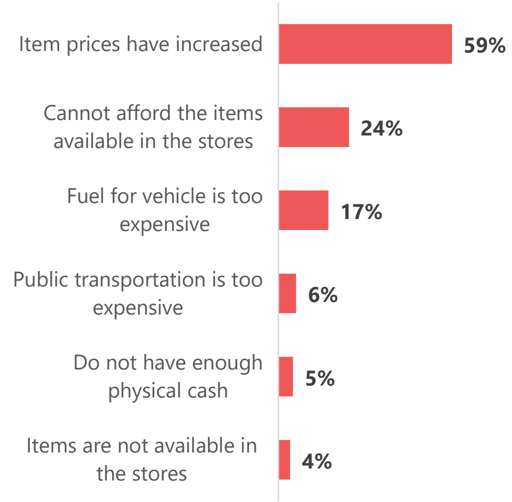
Furthermore, 40% of customer KIs in the South and East, followed by 28% in the North, indicated they could not afford goods available in their usual stores. The highest percentages were reported in Donetska (80%) and Khersonska (70%) oblasts. Meanwhile, the nationwide figure rose from 18% in February to 24% in March, reaching its highest level since the start of 2023. This increase could indicate a decline in the coping capacity of the population, especially in the areas with heightened security concerns.

The high cost of vehicle fuel emerged as another reported financial barrier affecting customers' access to shops nationwide, with responses ranging from 23% in the North to 13% in the West. **Expensive public transport was also cited as a constraint, notably in the North (11%).** According to the SSSU, the highest average ticket prices for public transport were in Lvivska (15.74 UAH) and Chernihivska (13.39 UAH) oblasts[5], with Chernihivska experiencing a 12% increase in the ticket cost over the past month.

It is noteworthy that **customer KIs in the East and South faced payment issues, as 13% and 12% of them, respectively, noted a lack of physical cash, and vendors were reluctant to accept other payment options.** This challenge was particularly pronounced in Khersonska (26%) and Donetska (20%) oblasts.

In addition, **this issue of affordability remained crucial nationwide, but especially affected customers in the East, South, North, and Kyiv, where it represented a significant barrier to accessing goods in stores and markets.**

Figure 4: Main financial barriers* to accessing goods in stores or marketplaces reported by customer KIs, nationally



* Respondents could select more than one option.

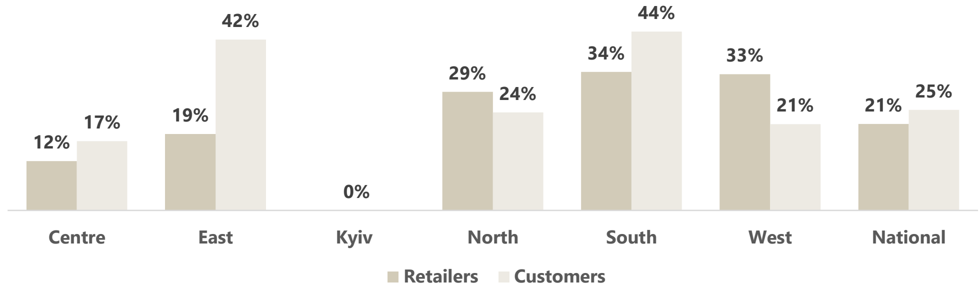
ACCESS TO STORES

In March at the national level, 25% of customer KIs indicated that the full-scale war was affecting their ability to physically access stores or marketplaces. Among retailer KIs, the figure was slightly lower, at 21%.

Difficulties in accessing stores were most frequently reported in the eastern and southern areas, where customers faced a variety of security-related factors. Specifically, in these oblasts, customer KIs reported active fighting or shelling affecting their access, with the highest percentages in Donetska (80%) and Khersonska (78%) oblasts. Restrictions on movement related to martial law reportedly had the biggest impact on customers in Donetska (70%), Khersonska (44%), and Zaporizka (22%) oblasts. Surveyed residents of Donetska (50%), Khersonska (48%), and Zaporizka (34%) oblasts mainly limited their access to local shops and markets due to feeling unsafe while in or approaching shops, driven by fears of being targeted.

Additionally, customer KIs in Khersonska (59%), Donetska (40%), and Kyivska (40%) oblasts reported **damage to buildings or infrastructure in stores or marketplaces. Damage or blockages on roads leading to these locations were mentioned in Khersonska and Zaporizka oblasts. Lack of transportation** mainly restricted access to stores for customers in Donetska (50%) and Khersonska (22%) oblasts.

Figure 5: % of customer and retailer KIs reporting that the full-scale war has affected the ability to access stores, by region



Moreover, 40% of customer KIs in Donetska, 16% in Zaporizka, as well as 11% in Khersonska oblasts indicated **a temporary interruption in shop operations due to power outages.**

It should be noted that air alerts, which were warnings of imminent attack, also temporarily restricted customers' access to shops, most frequently reported in Donetska (50%), Khersonska (30%), and Chernihivska (23%) oblasts.

REACH Informing more effective humanitarian action

AVAILABILITY OF GOODS

Food and hygiene items

The proportion of customer KIs reporting full availability of essential items decreased slightly nationally: from 98% in February to 94% in March for food items and from 97% to 92% for hygiene items.

Availability issues were mostly reported in the southern and eastern areas closer to the frontline.

Specifically, 40% of surveyed customers in Donetska, 23% in Kharkivska, and 22% in Khersonska oblasts reported that food items were not fully available for them in March*. Moreover, 41% of customer KIs in Khersonska, 40% in Donetska, and 25% in Kharkivska oblasts reported the same for hygiene items.

Figure 7: % of customer KIs reporting availability of food items, by oblast**

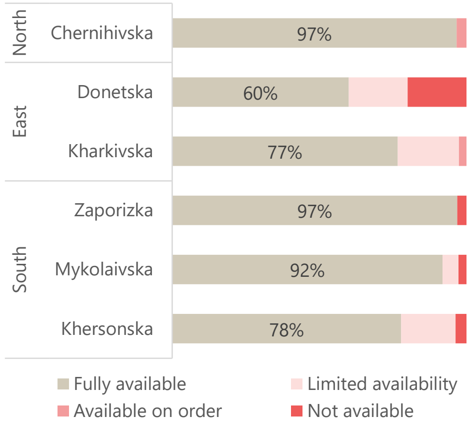


Figure 8: % of customer KIs reporting availability of hygiene, by oblast**

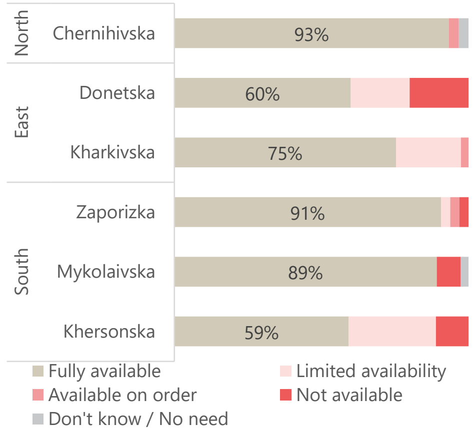


Figure 9: % of customer KIs reporting availability of medications, by oblast**

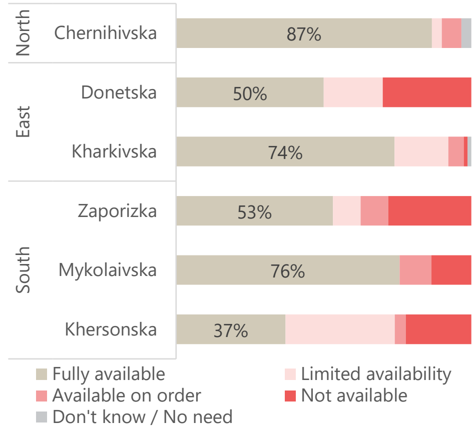
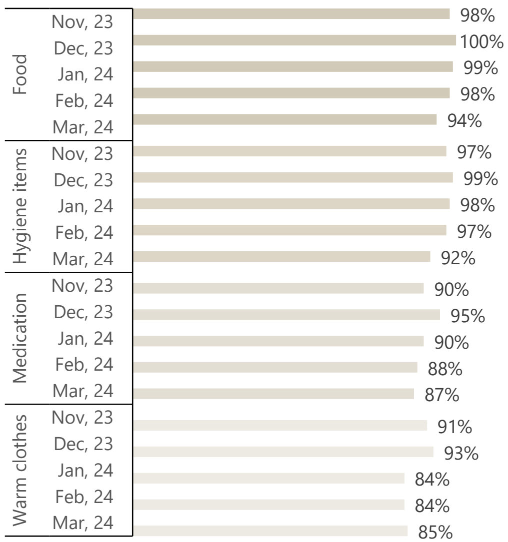


Figure 6: % of customer KIs reporting full availability of goods, nationally



On the other hand, retailer KIs in Kharkivska oblast reported availability issues for 19 of the 20 items included in the JMMI basket, particularly vegetables and baby items. Between 13% and 17% of retailers surveyed indicated a shortage or the need to order potatoes, cabbage, carrots, and onions, while 22% reported a shortage or lack of infant diapers and 17% reported the same for complementary cereal for babies.

Medications

In March, the availability of over-the-counter medication remained largely consistent with the previous month, with 87% of customer KIs reporting full availability. This percentage is slightly lower than the 90%-95% figures reported between November and January.

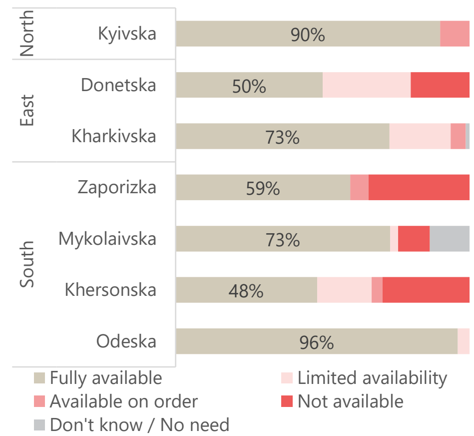
Similar to the previous month, **the situation in the South raised particular concern, with 17% of surveyed customers reporting unavailability of medications.**

At the oblast level, the situation appeared especially concerning in Donetska, Zaporizka, Khersonska, and Mykolaivska oblasts, with 30%, 28%, 22%, and 14% of customer KIs reporting the unavailability of medications. Additionally, 37% of customer KIs in Khersonska, 20% in Donetska, and 18% in Kharkivska oblast reported limited availability of medications. Furthermore, 11% in Mykolaivska oblast cited the need to buy medications only via ordering.

Warm clothes

In March, difficulties with the availability of warm clothes were primarily experienced in areas closer to the frontline, with 52% of surveyed customers in Khersonska, 50% in Donetska, 41% in Zaporizka, and 26% in Kharkivska oblast reporting that warm clothes were not fully available for them*.

Figure 10: % of customer KIs reporting availability of warm clothes, by oblast**



* This option includes the responses "not available", "limited availability", and "available on order".
** In southern, eastern, and northern oblasts with the lowest reported availability in the period under review.

AVAILABILITY OF ENERGY RESOURCES

In March, vehicle fuel remained fully available for the majority of customer KIs (67%) nationwide, a figure nearly identical to the previous month (68%). Meanwhile, availability issues were notable in areas close to the frontline, particularly in Khersonska and Donetska oblasts, where 41% and 40% of respondents, respectively, reported its unavailability, limited availability, or the need to purchase it only through ordering.

Regarding heating fuel, the lowest percentages of full availability were reported in the South (60%) and East (68%), contributing to a country-wide rate of 84%, a slight decrease compared to the previous month's 86%. The most significant availability issues were observed in Donetska and Khersonska oblasts, with 60% and 44% of customer KIs, respectively, reporting its unavailability, limited availability, or the need to purchase it only through ordering.

ACCESSIBILITY OF FINANCIAL SERVICES

Banks

In March, 58% of customer KIs reported full availability of bank branches providing all services, indicating a slight increase from the 56% reported in February. Air alerts reportedly restricted the opening hours of bank branches across the country except in Kyiv, with the highest proportion of respondents noting this in the Centre (55%), North (47%), and East (45%).

The greatest difficulties in accessing the full spectrum of banking services were experienced by respondents in the South and East, with 34% and 17% of surveyed customers, respectively, indicating the unavailability of functioning banks in their communities. These challenges were particularly pronounced in Zaporizka (with 69% of respondents), Donetska (50%), and Khersonska (48%) oblasts.

ATMs

In March, 84% of customer KIs reported the full availability of functioning ATMs, a figure nearly identical to the previous month (83%).

Access issues were notable in the South and East, with 31% and 17% of customer KIs reporting the absence of ATMs in their communities. At the oblast level, the highest percentages were found in Zaporizka (63%), Donetska (50%), and Khersonska (44%) oblasts. Additionally, 20% of customer KIs in Donetska oblast reported a longer-term interruption in services such as cash withdrawal.

Ukrposhta**

Nationwide, 65% of customer KIs reported that Ukrposhta offices operated daily and provided all of their regular financial services, showing a slight increase from the 63% reported in February.

Similar to bank branches, Ukrposhta offices were temporarily inaccessible during air alerts, with customers in the Centre and North being the most likely to find this an obstacle to accessing Ukrposhta services (reported by 51% and 41% of respondents, respectively).

At the same time, the JMMI survey in March revealed a notable share of respondents reporting the absence of functioning Ukrposhta offices and mobile post offices, with the highest percentages in Kharkivska (13%) and Donetska (10%) oblasts.

An additional barrier to accessing Ukrposhta was the irregular operation of its offices, such as operating only several days a week or a month. This irregularity was most commonly reported by respondents in Khersonska (30%) and Zaporizka (16%) oblasts. Moreover, 40% of customer KIs in Donetska and 11% in Mykolaivska oblasts mentioned the availability of only mobile post offices in their communities.

Figure 11: % of customer KIs reporting availability of vehicle fuel, by oblast*

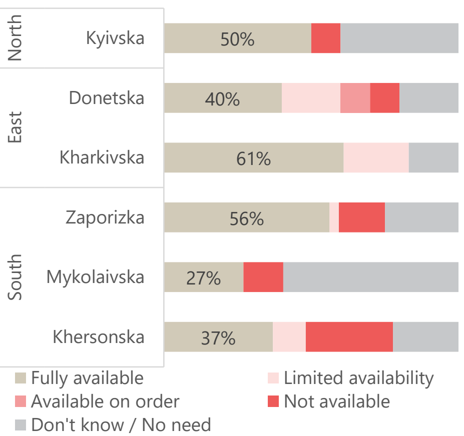


Figure 12: % of customer KIs reporting availability of functioning banks, by oblast*

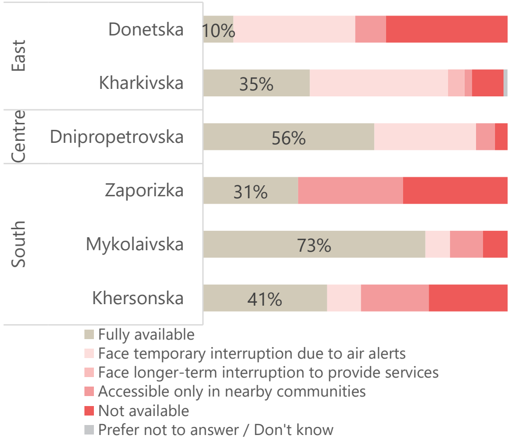


Figure 13: % of customer KIs reporting full availability of functioning ATMs, by oblasts*

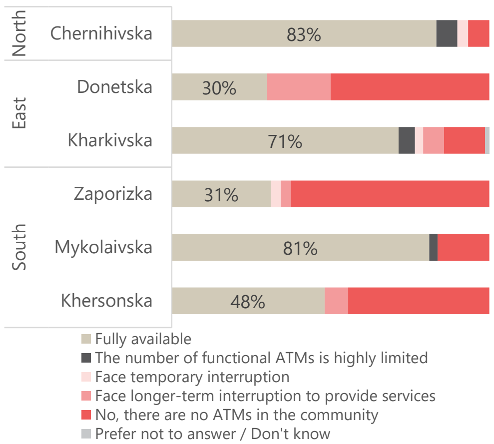
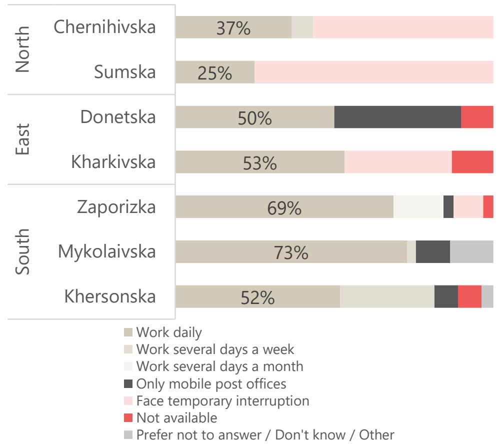


Figure 14: % of customer KIs reporting full availability of functioning Ukrposhta offices, by oblasts*



* In southern, eastern, and northern oblasts with the lowest reported availability in the period under review.

** Ukrposhta is Ukraine's national post.

MARKET FUNCTIONALITY

Current difficulties

In March, 23% of retailer KIs reported challenges in maintaining operational and well-stocked stores. Retailer KIs in the West and South faced difficulties more frequently than those in other regions of Ukraine, with 36% and 34% of respondents, respectively, reporting challenges due to the full-scale war.

Top 3 difficulties faced by retailer KIs in keeping their store operational and well-stocked due to the full-scale war, nationally

1. 16% Price increase among suppliers
2. 6% Full staffing
3. 6% Physical danger in the area

Nationwide, the primary difficulty reported by retailer KIs was high prices from suppliers (16%), with this being most particularly pronounced in the West (33%) and North (21%).

Map 4: Approximate percentage of working retailers in March 2024 from the pre-war level, reported by retailer KIs, by hromada

Challenges in fully staffing the shop and physically dangerous conditions in the area both ranked second on the list of difficulties faced by retailer KIs. Staffing problems were most often mentioned by retailer KIs in Kyivska oblast (70%), while 55% of retailer KIs in Khersonska oblast noted physical danger in the area, and 45% reported restrictions on movement.

Moreover, retailer KIs in Khersonska (55%) and Zaporizka (32%) oblasts mentioned difficulties related to the storage of goods during the absence of electricity.

It should be noted, that **retailer KIs in the South (32%), East (14%), and North (11%) were more likely to report that stores in their marketplaces were affected by the war, sustaining severe or some structural damage, with the highest percentages in Khersonska, Mykolaivska, and Kyivska oblasts.**

Challenges in the coming months

The survey findings revealed that **42% of retailers surveyed nationally in March anticipated encountering new difficulties in the near future due to the full-scale war, a notable decrease from the 58% reported in February.**

Top 2 challenges retailer KIs expected to face in the coming months due to the full-scale war, nationally

1. 32% Rising prices
2. 29% Reduced purchasing power of customers

The most alarming situation was identified in the North, where 66% of retailer KIs reported expecting an increase in prices, and 50% anticipated a decrease in the purchasing power of customers, with the highest percentages in Sumska and Kyivska oblasts.

Figure 15: % of retailer KIs reporting difficulties in keeping their stores operational and well-stocked due to the full-scale war, by region

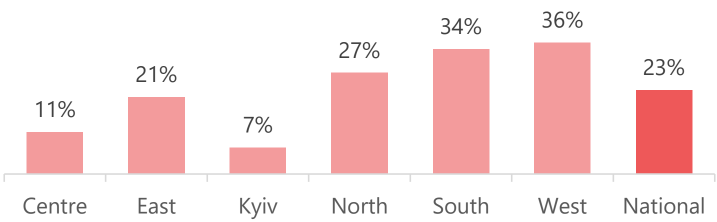
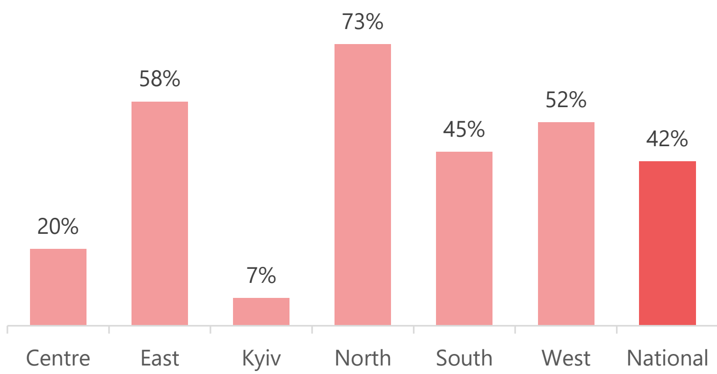


Figure 16: % of retailer KIs reporting anticipating new challenges due to the full-scale war, by region



CASH ASSISTANCE

In this section, data from the REACH Humanitarian Situation Monitoring (HSM) Calibration Assessment[6,7] is used.*

According to the HSM Calibration Assessment[6,7], 60% of households (HHs) nationwide reported having unmet needs requiring humanitarian assistance, including multi-purpose cash assistance (MPCA). The highest percentage of HHs reporting being in need was found in oblasts close to the frontline or bordering Russia, such as Khersonska, Donetska, Mykolaivska, Dnipropetrovska, Zaporizka, and Chernihivska, with figures ranging from 82% to 69%.

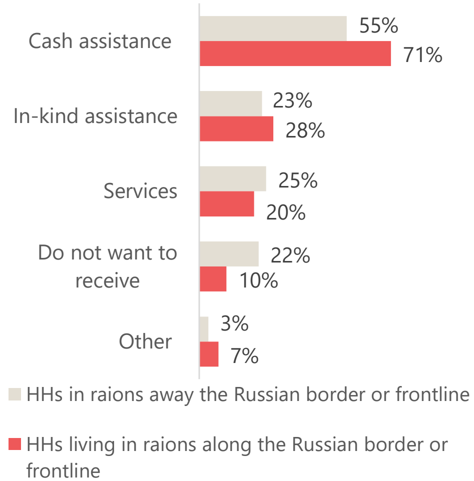
Top 5 HH self-reported priority needs, nationally

1. 19% Food
2. 19% Provision of medicines
3. 12% Healthcare services
4. 11% Fuel for heating
5. 10% Livelihood and employment support

Cash assistance emerged as the preferred modality for receiving aid in the future, as indicated by 57% of HHs nationwide, followed by in-kind assistance (24%) and services (24%)**. The preference for receiving both cash or in-kind assistance was notably higher in raions along the Russian border or frontline (Figure 17).

Cash assistance was the most reported preferred modality in Khersonska (83%), Zaporizka (71%), Donetska (70%), Sumska (70%), Khasrhivska (66%), Chernihivska (66%) oblasts, along with in-kind assistance in Mykolaivska (34%), Khersonska (30%), Odeska (30%), and Donetska (29%) oblasts.

Figure 17: % of HHs by the most reported modalities of assistance they would prefer in the future**



Source: HSM Calibration Assessment

Among assessed HHs, 18% reported receiving humanitarian assistance in the past 3 months before data collection, with the largest share in Donetska (83%) and Khersonska (81%) oblasts. Among these HHs, **a notably higher proportion received food or WASH assistance compared to cash assistance (86% and 24% compared to 19%, respectively).** Overall, **the majority of HHs that received cash assistance reported a relatively high level of satisfaction:** 86% were satisfied or very satisfied with the aid provided, while only 5% reported being dissatisfied.

For more detailed information, please see the HSM Calibration Assessment Factsheet[8].

HOUSEHOLD INCOME

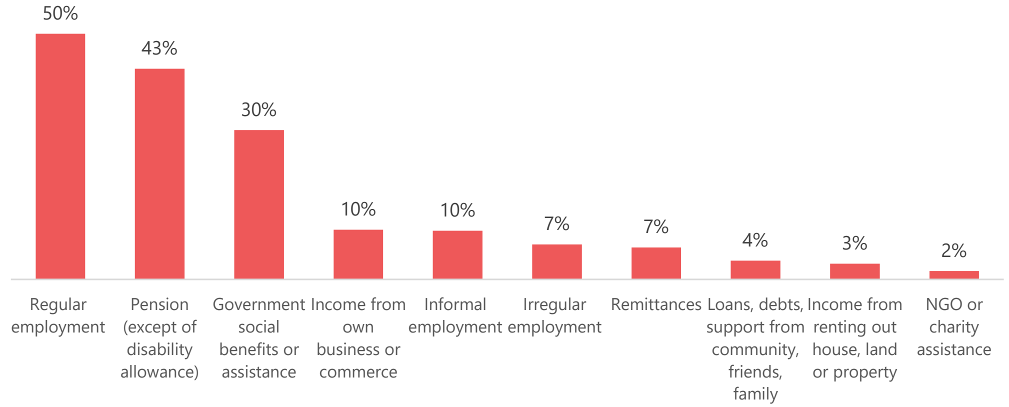
The estimated median monthly income reported per HH nationally was 9700 UAH. The lowest figure was found in oblasts close to the Russian border or frontline, such as Sumska (6500 UAH), Khersonska (7400 UAH), Mykolaivska (7400 UAH), as well as in raions along the Russian border or frontline of Kharkivska and Chernihivska oblasts (7500 UAH).

The most commonly reported primary income source over the 30 days before data collection was regular employment in the private or public sector (reported by 50% of HHs). **However, it is notable that a considerable portion of HHs relied on pensions and social benefits, accounting for 43% and 30%, respectively** (Figure 14).

The percentage of HHs that considered pensions as their primary source of income was the highest in Khersonska (54%) and Chernihivska (51%) oblasts, surpassing the percentage of HHs depending on regular employment, particularly in Khersonska oblast, where this figure was the lowest among all oblasts, at 29%. This may suggest a higher concentration of elderly people in these areas. Considering the average pension payment according to the Pension Fund of Ukraine[9], which was 4884 UAH in Khersonska and 5275 UAH in Chernihivska, constituting 15% and 8% less than the national average (5743 UAH), these individuals may face challenges in meeting their basic needs due to insufficient income.

Similarly, the highest percentage of HHs citing government social benefits or assistance as their primary source of income was observed in Zaporizka (48%) and Donetska (42%) oblasts. This may reflect the economic vulnerability of this segment of the population, indicating a higher proportion of individuals with lower coping capacities in these areas. **Consequently, HHs in these areas may require targeted support to alleviate their financial situation and ensure that the vulnerable population can meet their basic needs.**

Figure 18: % of HHs by primary income sources over the last 30 days prior to data collection**



Source: HSM Calibration Assessment

* In line with and in addition to the HSM's primary objective of providing up-to-date multi-sectoral data on the evolution of humanitarian needs in Ukraine across the Humanitarian Program Cycle (HPC) to enable monitoring of change in needs and the targeting of the HRP, the Calibration Assessment also intends to provide mid-term updates on crucial MSNA baseline data from June-August 2023. The Calibration Assessment aims to primarily ascertain information on changes over time in drivers of humanitarian needs, shifts in access to and functionality of services, and barriers to assistance.
Overall, REACH implemented 4,930 household-level Computer Assisted Telephone Interviews from 17 January to 18 February 2024 in 23 oblasts and Kyiv city with a 95% Level of Confidence and 7% Margin of Error sampling frame. The sample allows representative data to be reported at the oblast level.
** Respondents could select more than one option.

MACROECONOMICS

According to the data from the SSSU, the annual inflation rate decelerated to 3.2% in March 2024[10], its lowest level since October 2020[11]. On a monthly basis, inflation picked up to 0.5% from 0.3% in February[12,13]. Food and non-alcoholic beverages became cheaper by 0.2% (see Figure 20).

Inflation decelerated faster than the National Bank of Ukraine (NBU) had forecast[10]. Such dynamics were primarily driven by cheaper raw foods due to temporary factors, such as the effects of last year's large harvest and this year's mild winter, as well as the effects of export restrictions, which increased the supply of certain food products on the domestic market[14].

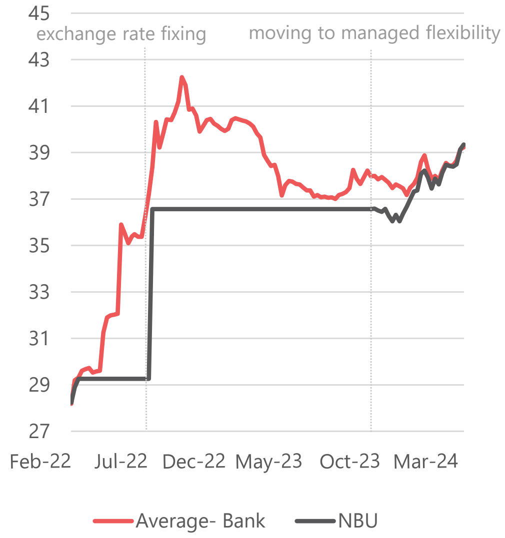
Despite the protracted full-scale war and the adverse effect of the blockade of Ukraine's western borders, Ukrainian businesses were demonstrating the ability to adapt to difficult conditions and were optimistic about their performance in the near future[15].

At the same time, increased shelling at the end of the month, in particular those aimed at energy infrastructure, likely slowed economic recovery[16].

According to business surveys, an increasing number of companies were facing difficulties in finding both skilled and unskilled workers[16]. The number of job seekers, as measured by the number of resumes posted on job search sites, continued to decline. This may be a result of both the recovery in employment and the limited supply of labor, in part due to mobilization and further migration[16].

In February, the goods trade deficit continued to narrow[17]: the imports of goods decreased due to the reinstatement of the blockade, and the imports of services decreased due to further adaptation of Ukrainians abroad and changes in their residency status[18]. Meanwhile, the exports of goods remained at January levels.

Figure 19: Mid-market exchange rate for the US Dollar (USD)



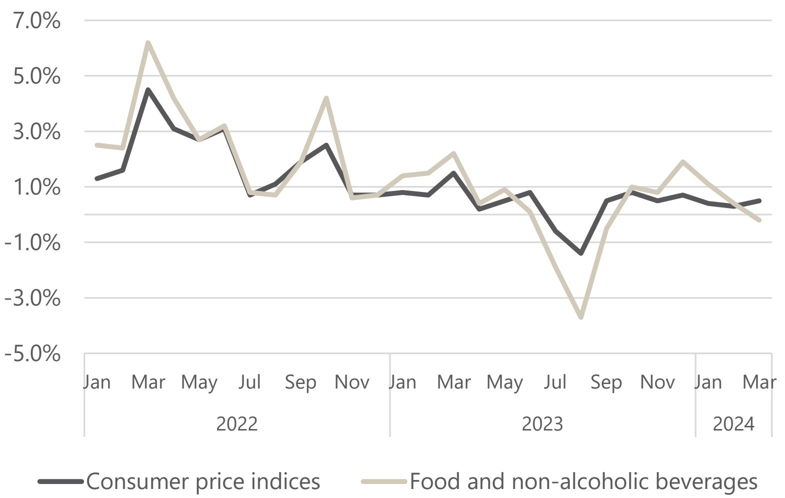
Source: MINFIN

Table 3: Top 10 oblasts with the highest average monthly rent for a one-bedroom apartment (UAH) in March 2024

Oblast	Average rent in UAH	Change since Feb 2024	Change since Mar 2023
Zakarpatska	11873	0%	▼10%
Lvivska	11838	▲1%	▲4%
Rivnenska	9744	0%	▲71%
Kyiv City	8989	0%	▲22%
Chernivetska	8103	▲1%	▲14%
Khmelnytska	7808	▲1%	▲10%
Cherkaska	7675	▲2%	▲25%
Volynska	7473	0%	▲35%
Ivano-Frankivska	7157	0%	▲47%
Vinnytska	6532	▲1%	▲24%
Ukraine	**6851**	**0%**	**▲14%**

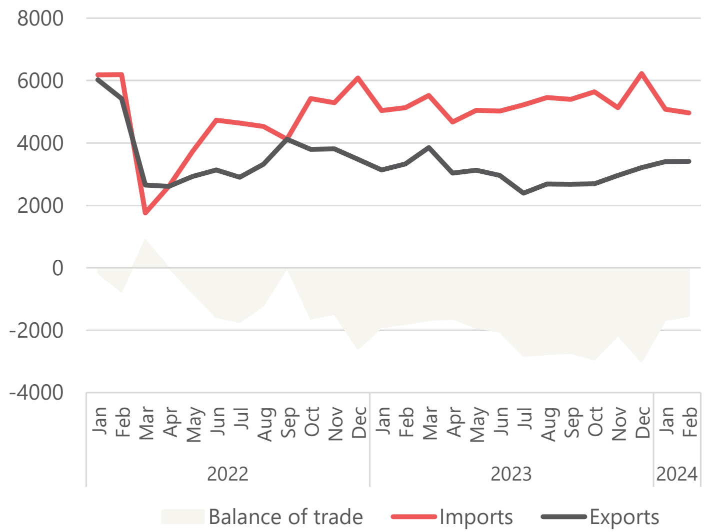
Source: SSSU

Figure 20: Monthly inflation rate (%)



Source: SSSU

Figure 21: Changes in gross value of exports and imports of Ukraine (million USD)



Source: SSSU

Table 4: Price increase of selected medicines, nationally

Representatives goods	Average consumer prices in UAH	Change since Feb 2024	Change since Mar 2023
Antibiotics of domestic brands	54.22	▲1%	▲21%
Antibiotics of imported brands	200.33	▲2%	▲7%
Antipyretic and analgesics of domestic brands	21.61	▲3%	▲27%
Antipyretic and analgesics of imported brands	28.46	▲2%	▲11%
Vasodilating agents of domestic brands	15.76	▲1%	▲14%
Vasodilating agents of imported brands	72.12	▲1%	▲8%

Source: SSSU

Methodology

Data collection is a joint, partner-led exercise carried out once per month by participating CWG members across the country. The methodology for collecting primary data focuses on quantitative, structured interviews with purposively sampled interviewees. Two harmonized questionnaires are used: one targeting retail market traders who act as key informants (KIs) for their respective markets, and another targeting customers in monitored stores and marketplaces for individual interviews.

Field teams must aim to collect a minimum of three prices per item per assessed hromada, interviewing retailer KIs until this threshold is met, and must also submit a minimum of five customer KI interviews per assessed hromada. Only the price of the least expensive commonly purchased brand or variety is recorded for each item. All data is collected by field staff trained on the common JMMI methodology and tools; it is then submitted to a common CWG KoBo server and is cleaned and analyzed by REACH on behalf of the CWG.

Secondary data, in particular data from the State Statistics Service of Ukraine, are also integrated into the JMMI and used for triangulation where possible.

The prices reported in this factsheet are 'location medians', designed to minimize the effects of outliers and unequal numbers of prices submitted from diverse locations. First, the median prices of each assessed item is calculated within each assessed hromada; then, for each item, REACH calculates the median of this list of hromada-level medians across larger geographical areas (raions, oblasts, regions, and the whole of Ukraine).

More details on the methodology can be found in the JMMI terms of reference (ToR), available here.

Challenges and Limitations

As the JMMI relies on purposive sampling methodologies, the results must be regarded as indicative and not representative. Furthermore, results are indicative only of market conditions during the time frame in which they were collected.

The JMMI methodology records the price of the least expensive commonly purchased brand or variety available in the store for each item. As brand availability may vary from area to area, price comparisons across areas may sometimes be based on slightly varying products.

In some cases, partners were unable to collect the minimum number of retailer KI or customer KI interviews required by the JMMI methodology. Where necessary, imputation from raion-level or oblast-level medians was used to compensate for missing prices and enable the cost of the JMMI basket to be calculated.

While the JMMI's remote monitoring methodology produces reliable data on prices and availability, further data on market functionality cannot be collected using this methodology.

As the JMMI continues to expand into new hromadas, some changes in the overall median prices may be driven by shifts in coverage rather than by true price.

About REACH

REACH Initiative facilitates the development of information tools and products that enhance the capacity of aid actors to make evidence-based decisions in emergency, recovery and development contexts. The methodologies used by REACH include primary data collection and in-depth analysis, and all activities are conducted through inter-agency aid coordination mechanisms. REACH is a joint initiative of IMPACT Initiatives, ACTED and the United Nations Institute for Training and Research - Operational Satellite Applications

Endnotes

Page 4

[1] National Bank of Ukraine, NBU March 2024 Inflation Update, 10 April 2024, available here

[2] EastFruit, Due to the influx of imported products, potato prices in Ukraine have begun to decline, 20 March 2024, available here

[3] State Statistics Service of Ukraine, Average consumer prices for goods (services) in Ukraine in 2024, 12 April 2024, available here

[4] National Bank of Ukraine, NBU March 2024 Inflation Update, 10 April 2024, available here

Page 5

[5] State Statistics Service of Ukraine, Average consumer prices for goods (services) in Ukraine in 2024, 12 April 2024, available here

Page 9

[6] Reach HSM Calibration 2024 Indicator Analysis_Macroregion, 11 April 2024, available here

[7] Reach HSM Calibration 2024 Indicator Analysis_Oblast, 11 April 2024, available here

[8] HSM Calibration Assessment 2024 Factsheet (will be published in May/June 2024)

[9] The Pension Fund of Ukraine, Average amount of pension benefit granted, 12 April 2024, available here

Page 10

[10] State Statistics Service of Ukraine, Price indices, 9 April 2024, available here

[11] Trading Economics, Ukraine Inflation Slows Further in March, 9 April 2024, available here

[12] State Statistics Service of Ukraine, Price indices, 8 March 2024, available here

[13] State Statistics Service of Ukraine, Price indices, 9 April 2024, available here

[14] National Bank of Ukraine, NBU March 2024 Inflation Update, 10 April 2024, available here

[15] National Bank of Ukraine, Monthly Business Outlook Survey March 2024, 1 April 2024, available here

[16] National Bank of Ukraine, Monthly Macroeconomic and Monetary Review, April 2024, 4 April 2024, available here

[17] State Statistics Service of Ukraine, Ukraine's foreign trade in goods in January-February 2024, 15 April 2024, available here

[18] National Bank of Ukraine, Monthly Macroeconomic and Monetary Review, April 2024, 4 April 2024, available here

About the CWG

The Ukraine Cash Working Group (CWG) was established in 2016 and is currently co-chaired by ACTED and OCHA. It is a technical working group within the Inter Cluster Coordination Group (ICCG) under the overall strategic and programmatic direction of the Humanitarian Country Team (HCT). The CWG focuses on the operational coordination of Multi-Purpose Cash (MPC) programming and the support to the coherence of the use of cash as a modality in the wider humanitarian response.

Participating partners

Donors