



Food Affordability in Ukraine Amidst the War

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Since March 2022, the KSE Agrocenter has been assessing food affordability in Ukraine by evaluating people's ability to secure sufficient income or resources to obtain food. This analysis is based on the Food Affordability Index (FAI), which measures the ratio of the average salary to the cost of a defined basket of essential food products. To provide a more detailed understanding of the situation, the FAI also incorporates alternative income scenarios, including the minimum pension, minimum wage, and payments for internally displaced persons (IDPs), allowing for differentiation among social groups. The index is calculated using regional daily prices for 21 critical food items, as reported by the State Statistics Service of Ukraine (SSSU).

MAIN FINDINGS

- Before the RF's full-scale invasion, the FAI score was 9.5, implying that the person with an average salary could buy 9.5 food baskets. After February 24, 2022, as both consumer prices rose and income declined, FAI decreased by 19%. 3 years amidst the war, in February 2025, the national average FAI is still **far below the pre-war level** (89.42% of January 2022 value). While it is higher than the 3-year-lowest value in mid-2023, **food affordability has been declining since July 2024 as opposed to the expected positive effect of the harvesting season.**
- Western regions such as Cherkasy, Chernivtsi, Rivne oblasts, experienced the highest improvement in FAI: up to 96% of the January 2022 level in February 2025. In regions closer to the frontline (Zaporizhzhia, Dnipro oblasts), and those suffering from more intense air strikes (Odesa oblast) the recovery was less pronounced: 82-86% of the January 2022 level in February 2025.
- FAI values for alternative income scenarios, i.e.m the minimum pension, minimum wage, and internally displaced persons' (IDP) payments, show noticeably slower recovery.
- For vulnerable groups, FAI is still far below the pre-war level.

METHODOLOGY

The FAI is calculated as the ratio of income to the price of a standardized basket of essential food products, reflecting the affordability of food in each region. The basket used for the estimation is based on the basket from the 2022 FAI estimation by KSE Agrocenter¹, updated based on the average food products consumption data by SSSU.² In terms of incomes, 4 scenarios are estimated. The primary income scenario uses salary data sourced from work.ua portal. It is calculated as an average of salaries offered in the job listings and salary expectations of applicants.³ Additionally, three scenarios for more vulnerable lower-income groups were analyzed to reflect the broader socioeconomic impact on food affordability. In this case, we use minimum wages and pensions, as well as IDP payments by the government as the income data. Average food products prices were obtained from SSSU.⁴

FAI AMIDST THE WAR

First five months of the war: Before Russia's full-scale invasion, the Food Affordability Index (FAI) stood at 9.5, meaning that a person earning an average salary could purchase 9.5 food baskets. However, in the first five months of the war, the FAI dropped sharply by 19% compared to pre-war levels due to rising consumer prices and declining incomes. Price increases were driven by global food and energy market shocks, large-scale infrastructure destruction, rising logistics costs, business disruptions, and breakdowns in supply chains. At the same time, average nominal earnings - including employment benefits for those who lost their jobs - fell by 34%, as estimated based on the Gradus report and authors' observations.⁵

1 KSE Agrocenter. Food Security and Agricultural Policy Review in Ukraine. May 17 2022. Annex A1 - Methodology. https://kse.ua/wp-content/uploads/2022/05/Food-security-and-policy-in-Ukraine_issue-1_merged-1.pdf

2 SSSU. Balances and consumption of main food products by the population of Ukraine. https://www.ukrstat.gov.ua/druk/publicat/kat_u/2022/zb/07/Zb_bsph2021.pdf

3 <https://www.work.ua/stat/salary/>

4 SSSU. Average consumer prices for goods (services). https://www.ukrstat.gov.ua/operativ/operativ2018/ct/sctp/Arch_sctp_e.htm

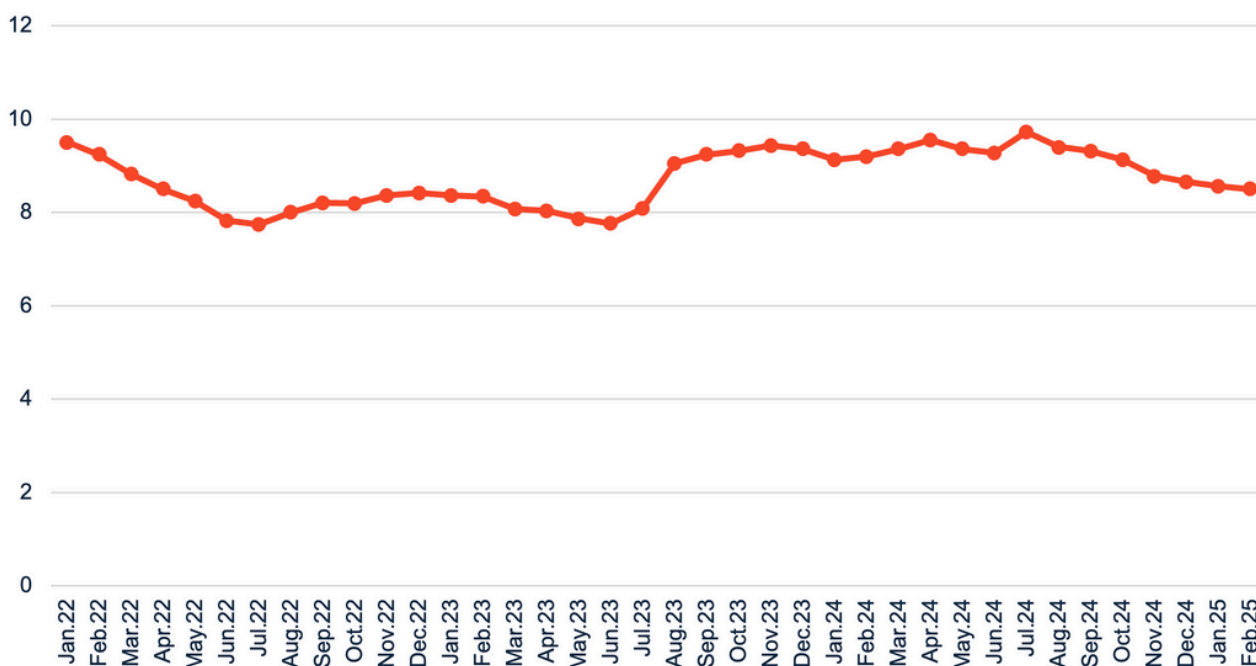
5 KSE Agrocenter. Food Security and Agricultural Policy Review in Ukraine. May 17 2022. Annex A1 - Methodology. https://kse.ua/wp-content/uploads/2022/05/Food-security-and-policy-in-Ukraine_issue-1_merged-1.pdf

Between July 2022 and June 2023 – the marketing year for most plant-based agricultural commodities - the FAI showed seasonal improvements during the vegetable and staple crop harvesting period, returning to its July 2022 level by the end of the period. This indicates that food affordability in Ukraine remained stable throughout the year, though at low level - approximately 80% of pre-war affordability.

From **August 2023 to July 2024**, the FAI exhibited an upward trend. By August 2023, labor shortages became evident due to high demand in agriculture during the staple crop harvest and a strained labor market after 1.5 years of war and multiple waves of mobilization, resulting in rising wages. Simultaneously, consumer prices for vegetables dropped with the onset of the harvesting season. This combination significantly boosted the FAI, which reached 9.4 in November 2023 and remained relatively stable at approximately 95–99% of pre-war levels.

However, **since September 2024**, the FAI has reverted to a negative trend, reflecting both rising inflation and seasonal price increases during the winter months. By February 2025, value of FAI reached, 8.5, which is approximately 89% of the January 2022 level, indicating that the affordability of food still is still far from full recovery.

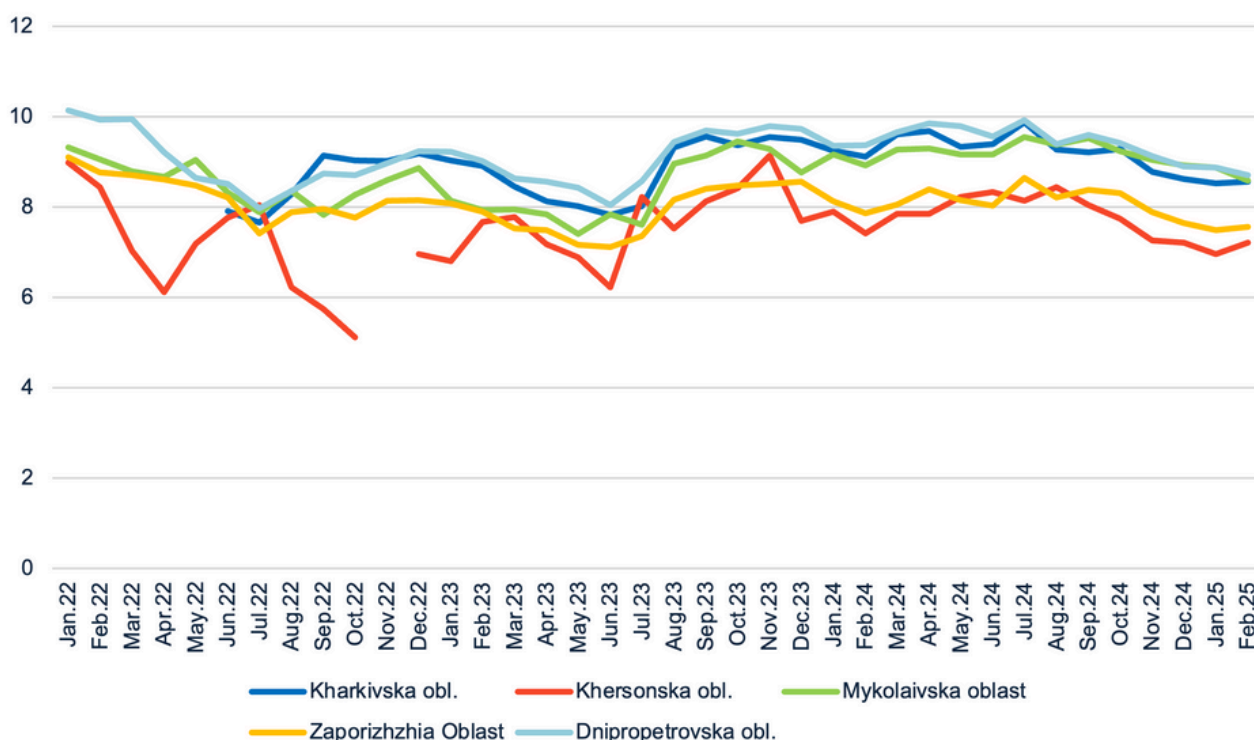
Figure 1. FAI, Ukraine average



Regional disparities are distinct, particularly in frontline areas like Kherson, Zaporizhzhia, and Mykolaiv, where the recovery in food affordability has lagged behind national trend. By mid-2022, Kherson’s FAI had dropped to 61% of its January 2022 level, reflecting the severe disruptions to local infrastructure and food supply chains. By mid-2024, Kherson’s FAI has only recovered to 88%, and dropped to 80% of the pre-war level by February 2025.

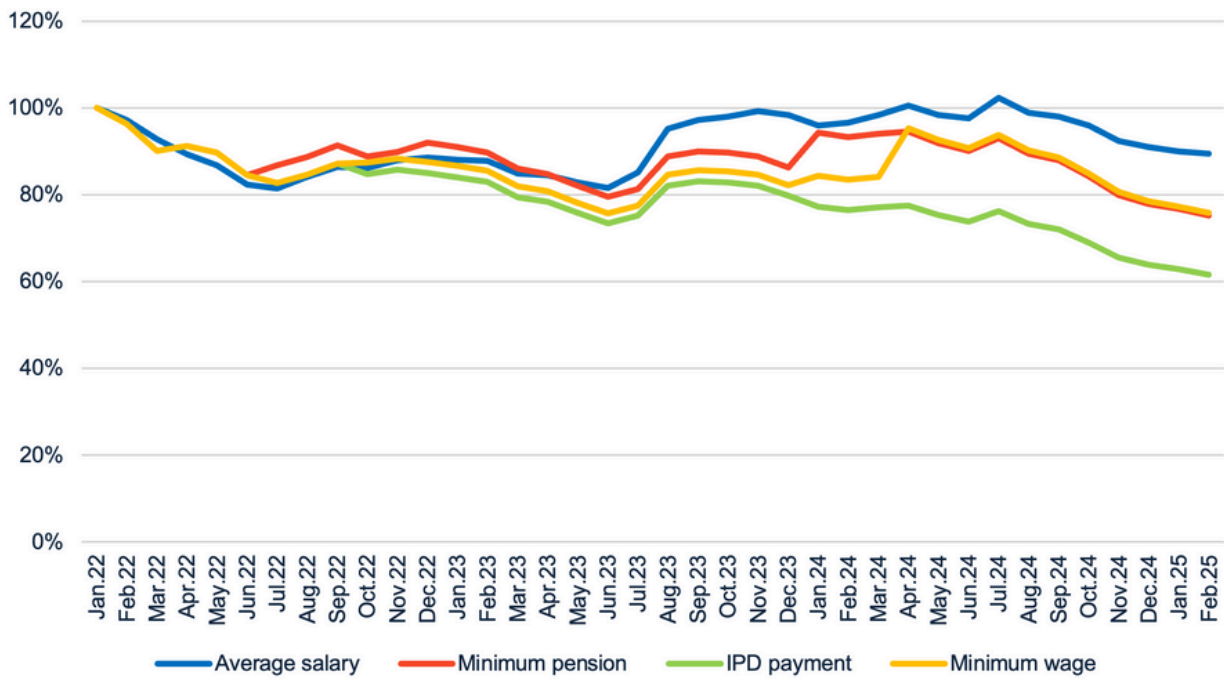
Similarly, Zaporizhzhia oblast remains behind with FAI equal to only 83% of pre-war level in February 2025. At the same time, Mykolaiv, Dnipro and Kharkiv oblasts have demonstrated slightly better recovery rate, reaching 92%, 96% and 97% of January 2022 FAI level by February 2025, respectively.

Figure 2. FAI, frontline regions



Vulnerable populations, such as pensioners, minimum wage earners, and internally displaced persons (IDPs), have experienced a much slower recovery in food affordability compared to the broader population. By February 2025, the FAI for individuals receiving IDP payments had dropped to around 62% of January 2022 levels, while for pensioners it had fallen to 75%. These figures are significantly below the national average.

Figure 3. FAI, vulnerable groups income scenarios



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