Regional Refugee Response for the Ukraine Situation

UNHCR The UN Refugee Agency

MARKET ASSESSMENT – FINAL REPORT

October, 2023

The Market Assessment was conducted by Magenta Consulting and commissioned by UNHCR under the framework of the Refugee Response in the Republic of Moldova for the Cash Working Group. UNHCR is grateful for the engagement of the representatives of civil society organizations, and their networks, as well as to other UN Agencies, humanitarian partners, and the refugee community, as well as to the donors that made this assessment possible.

Copyright © 2023 UNHCR. All rights reserved.

This publication is copyrighted, but the text may be used free of charge for advocacy, campaigning, education, and research, provided that the source is acknowledged in full. For copying in any other circumstances, or for re-use in other publications, or for translation or adaptation, permission must be secured. The information in this publication is correct at the time of publication.

Contents:

ACRONYMS **11**

INTRODUCTION **12**

i.1 Purpose of the research 12

i.2 Methodology 12

i.3 Limits of the study 15

CHAPTER I: MARKET ASSESSMENT - SURVEY AMONG CUSTOMER **16**

1.1. Profile of the respondents 16

1.2. Availability of markets 17

1.3. Accessibility 46

1.4. Difficulties and expectations (main problems faced) 55

1.5. Availability of financial service providers 59

CHAPTER II: MARKET ASSESSMENT - SURVEY AMONG RETAILERS **68**

2.1. Food items list 68

2.2. Suppliers 82

2.3. Services 88

2.4. Quality 90

2.5. Access 91

2.6. Difficulties and expectations (main problems faced) 92

2.7. Availability of financial service providers 96

2.8. Payment methods 102

CHAPTER III: MARKET ASSESSMENT – KEY INFORMANT INTERVIEWS **107**

3.1. Beneficiaries' consumption and mobility patterns 107

3.2. Overall price levels in the regions 109

3.3. Specific barriers to access certain markets 109

CONCLUSIONS **114**

Figures:

Figure 1: Category of respondents, N=191, % 16
Figure 2: Demographic data of respondents, % 16
Figure 3: Duration of refugees' stay in RM, N=108, % 17
Figure 4.1: Q2.1. Please indicate the current level of availability in stores and markets in your community/region for each of the following, % 18
Figure 4.2: Q2.1. Please indicate the current level of availability in stores and markets in your community/region for each of the following, % 18
Figure 4.3: Q2.1. Please indicate the current level of availability in stores and markets in your community/region for each of the following, % 19
Figure 4.4: Q2.1. Please indicate the current level of availability in stores and markets in your community/region for each of the following, % 19
Figure 4.5: Q2.1. Please indicate the current level of availability in stores and markets in your community/region for each of the following, % 20
Figure 4.6: Q2.1. Please indicate the current level of availability in stores and markets in your community/region for each of the following, % 20
Figure 4.7: Q2.1. Please indicate the current level of availability in stores and markets in your community/region for each of the following, % 21
Figure 4.8: Q2.1. Please indicate the current level of availability in stores and markets in your community/region for each of the following, % 21
Figure 4.9: Q2.1. Please indicate the current level of availability in stores and markets in your community/region for each of the following, % 22
Figure 4.10: Q2.1. Please indicate the current level of availability in stores and markets in your community/region for each of the following, % 22
Figure 5.1: Q2.2. How regularly are you buying these items?, % 24
Figure 5.2: Q2.2. How regularly are you buying these items?, % 24
Figure 5.3: Q2.2. How regularly are you buying these items?, % 25
Figure 5.4: Q2.2. How regularly are you buying these items?, % 25
Figure 5.5: Q2.2. How regularly are you buying these items?, % 26
Figure 5.6: Q2.2. How regularly are you buying these items?, % 26
Figure 5.7: Q2.2. How regularly are you buying these items?, % 27
Figure 5.8: Q2.2. How regularly are you buying these items?, % 27
Figure 5.9: Q2.2. How regularly are you buying these items?, % 28
Figure 5.10: Q2.2. How regularly are you buying these items?, % 28
Figure 6.1: Q2.3. How has the current price changed for the items you buy compared to the same period last year?, % of respondents that mentioned regularly purchasing the items 30
Figure 6.2: Q2.3. How has the current price changed for the items you buy compared to the same period last year?, % of respondents that mentioned regularly purchasing the items 30
Figure 6.3: Q2.3. How has the current price changed for the items you buy compared to the same period last year?, % of respondents that mentioned regularly purchasing the items 31
Figure 6.4: Q2.3. How has the current price changed for the items you buy compared to the same period last year?, % of respondents that mentioned regularly purchasing the items 31
Figure 6.5: Q2.3. How has the current price changed for the items you buy compared to the same period last year?, % of respondents that mentioned regularly purchasing the items 32
Figure 6.6: Q2.3. How has the current price changed for the items you buy compared to the same period last year?, % of respondents that mentioned regularly purchasing the items 32

Figure 6.7: Q2.3. How has the current price changed for the items you buy compared to the same period last year?, % of respondents that mentioned regularly purchasing the items 33
Figure 6.8: Q2.3. How has the current price changed for the items you buy compared to the same period last year?, % of respondents that mentioned regularly purchasing the items 33
Figure 6.9: Q2.3. How has the current price changed for the items you buy compared to the same period last year?, % of respondents that mentioned regularly purchasing the items 34
Figure 6.10: Q2.3. How has the current price changed for the items you buy compared to the same period last year?, % of respondents that mentioned regularly purchasing the items 34
Figure 7.1: Q2.4. Please assess the how affordable are the items?, % 36
Figure 7.2: Q2.4. Please assess the how affordable are the items?, % 36
Figure 7.3: Q2.4. Please assess the how affordable are the items?, % 37
Figure 7.4: Q2.4. Please assess the how affordable are the items?, % 37
Figure 7.5: Q2.4. Please assess the how affordable are the items?, % 38
Figure 7.6: Q2.4. Please assess the how affordable are the items?, % 38
Figure 7.7: Q2.4. Please assess the how affordable are the items?, % 39
Figure 7.8: Q2.4. Please assess the how affordable are the items?, % 39
Figure 7.9: Q2.4. Please assess the how affordable are the items?, % 40
Figure 7.10: Q2.4. Please assess the how affordable are the items?, % 40
Figure 8: Q2.6. In the last 30 days, did households in this region face any of the following barriers to consistently accessing marketplaces?, N=191, % 46
Figure 9.1: Q3.1. How far away is the nearest market where you normally buy food items is located?, % 46
Figure 9.2: Q3.1. How far away is the nearest market where you normally buy food items is located?, % 46
Figure 9.3: Q3.1. How far away is the nearest market where you normally buy food items is located?, % 47
Figure 9.4: Q3.1. How far away is the nearest market where you normally buy food items is located?, average (km) 47
Figure 10.1: Q3.2. Please assess the level of prices for food items in this market, % 47
Figure 10.2: Q3.2. Please assess the level of prices for food items in this market, % 48
Figure 10.3: Q3.2. Please assess the level of prices for food items in this market, % 48
Figure 10.4: Q3.2. Please assess the level of prices for food items in this market, % disaggregated by whether the household reporting currently facing the issue of a lack of money to cover essential needs .. 48
Figure 11.1: Q3.3. Please assess the level of assortment/diversity of food items in this market, % 48
Figure 11.2: Q3.3. Please assess the level of assortment/diversity of food items in this market, % 48
Figure 11.3: Q3.3. Please assess the level of assortment/diversity of food items in this market, % 49
Figure 12.1: Q3.4. How far away is the nearest market where you normally buy non-food items is located?, % 49
Figure 12.2: Q3.4. How far away is the nearest market where you normally buy non-food items is located?, % 49
Figure 12.3: Q3.4. How far away is the nearest market where you normally buy non-food items is located?, % 50
Figure 12.4: Q3.4. How far away is the nearest market where you normally buy non-food items is located?, average (km) 50
Figure 13.1: Q3.5. Please assess the level of prices for non-food items in this market, % 50
Figure 13.2: Q3.5. Please assess the level of prices for non-food items in this market, % 51
Figure 13.3: Q3.5. Please assess the level of prices for non-food items in this market, % 51
Figure 14.1: Q3.6. Please assess the level of assortment/diversity of non-food items in this market, % ... 51
Figure 14.2: Q3.6. Please assess the level of assortment/diversity of non-food items in this market, % ... 51

Figure 14.3: Q3.6. Please assess the level of assortment/diversity of non-food items in this market, % ...52
Figure 15.1: Q3.7. In the past 3 months, has there been a time when you or members your household could not access any food item that are usually part of your diet by this time of the year?, % ...52
Figure 15.2: Q3.7. In the past 3 months, has there been a time when you or members your household could not access any food item that are usually part of your diet by this time of the year?, % ...52
Figure 15.3: Q3.7. In the past 3 months, has there been a time when you or members your household could not access any food item that are usually part of your diet by this time of the year?, % ...52
Figure 15.4: Q3.7. Profile of respondents based on instances of household's reduced access to essential food items in the past 3 months, % ...53
Figure 16: Q3.8. If yes, what was the main reason?, N=37, % ...53
Figure 17.1: Q3.9. In the past 3 months, has there been a time when you or members your household could not access essential non-food items that you are usually buying during this time of the year?, % ...54
Figure 17.2: Q3.9. In the past 3 months, has there been a time when you or members your household could not access essential non-food items that you are usually buying during this time of the year?, % ...54
Figure 17.3: Q3.9. In the past 3 months, has there been a time when you or members your household could not access essential non-food items that you are usually buying during this time of the year?, % ...54
Figure 17.4: Profile of respondents based on instances of household's reduced access to essential non-food items in the past 3 months, % ...54
Figure 18: Q3.10. If yes, what was the main reason?, N=29, % ...55
Figure 19.1: Q4.1. What are the main problems with accessing essential food and non-food items you have faced during the same period of the year?, % ...55
Figure 19.2: Q4.1. What are the main problems with accessing essential food and non-food items you have faced during the same period of the year?, % ...56
Figure 19.3: Q4.1. What are the main problems with accessing essential food and non-food items you have faced during the same period of the year?, % ...56
Figure 20.1: Q4.2. What are the main problems with accessing essential food and non-food items you have faced currently?, % ...57
Figure 20.2: Q4.2. What are the main problems with accessing essential food and non-food items you have faced currently?, % ...57
Figure 20.3: Q4.2. What are the main problems with accessing essential food and non-food items you have faced currently?, % ...57
Figure 20.4: Q4.2. What are the main problems with accessing essential food and non-food items you have faced currently?, % disaggregated based on whether the respondents reported currently facing a lack of money to cover essential needs ...58
Figure 20.4: Profile of participants, disaggregated based on whether the respondents reported currently facing a lack of money to cover essential needs ...58
Figure 21.1: Q4.3. How do you cope with these problems?, % ...59
Figure 21.2: Q4.3. How do you cope with these problems?, % ...59
Figure 21.3: Q4.3. How do you cope with these problems?, % ...59
Figure 22.1: Q5.1. Are there bank branches in your locality and are they currently open?, % ...60
Figure 22.2: Q5.1. Are there bank branches in your locality and are they currently open?, % ...60
Figure 22.3: Q5.1. Are there bank branches in your locality and are they currently open?, % ...60
Figure 23.1: Q5.2. Are there any ATMs in your locality and are they working?, % ...61
Figure 23.2: Q5.2. Are there any ATMs in your locality and are they working?, % ...61
Figure 23.3: Q5.2. Are there any ATMs in your locality and are they working?, % ...61
Figure 24.1: Q5.3. How far away is the nearest bank located?, % ...62
Figure 24.2: Q5.3. How far away is the nearest bank located?, % ...62

Figure 24.3: Q5.3. How far away is the nearest bank located?, % 62
Figure 24.4: Q5.3. How far away is the nearest bank located?, average (km) 63
Figure 25.2: Q5.4. How far away is the nearest ATM located?, % 64
Figure 25.3: Q5.4. How far away is the nearest ATM located?, % 64
Figure 25.4: Q5.4. How far away is the nearest ATM located?, average (km)....64
Figure 26.1: Q5.5. Are other financial services available in your locality (national and international financial transfers)?, % 65
Figure 26.2: Q5.5. Are other financial services available in your locality (national and international financial transfers)?, % (yes) 65
Figure 26.3: Q5.5. Are other financial services available in your locality (national and international financial transfers)?, % (yes) 65
Figure 27.1: Q5.6. The financial service providers work..., %....66
Figure 27.2: Q5.6. The financial service providers work..., %....66
Figure 27.3: Q5.6. The financial service providers work..., %....66
Figure 28.1: Q5.7. How far away is the nearest financial service provider located?, % 67
Figure 28.2: Q5.7. How far away is the nearest financial service provider located?, % 67
Figure 28.3: Q5.7. How far away is the nearest financial service provider located?, % 67
Figure 29: What is the maximum number of distinct items on sale in this shop?, N=46, % 68
Figure 30.1: Q2.1. In your shop, what do you normally sell?, N=46, % 68
Figure 30.2: Q2.1. In your shop, what do you normally sell?, N=46, % 69
Figure 30.3: Q2.1. In your shop, what do you normally sell?, N=46, % 70
Figure 31.1: Q2.2. Are there any products that are currently scarce in your shop?, N=46, % 71
Figure 31.2: Q2.2. Are there any products that are currently scarce in your shop?, N=46, % 71
Figure 31.3: Q2.2. Are there any products that are currently scarce in your shop?, N=46, % 72
Figure 32.1: Q2.3. Are you afraid of running out of stocks within a week from now for…, % 73
Figure 32.2: Q2.3. Are you afraid of running out of stocks within a week from now for…, N* 73
Figure 32.3: Q2.3. Are you afraid of running out of stocks within a week from now for…, N* 73
Figure 33.1: Q2.4. How many suppliers do you have for…, %* 74
Figure 33.2: Q2.4. How many suppliers do you have for…, N* 74
Figure 33.3: Q2.4. How many suppliers do you have for…, N* 75
Figure 33.4: Q2.4. How many suppliers do you have for…, N* 75
Figure 33.5: Q2.4. How many suppliers do you have for…, N* 75
Figure 33.6: Q2.4. How many suppliers do you have for…, N* 76
Figure 33.7: Q2.4. How many suppliers do you have for…, N* 76
Figure 34.1: Q2.5. What is the current retail price level change for…, %*....77
Figure 34.2: Q2.5. What is the current retail price level change for…, N* 77
Figure 34.3: Q2.5. What is the current retail price level change for…, N* 78
Figure 34.4: Q2.5. What is the current retail price level change for…, N* 78
Figure 34.5: Q2.5. What is the current retail price level change for…, N* 79
Figure 34.6: Q2.5. What is the current retail price level change for…, N* 79
Figure 34.7: Q2.5. What is the current retail price level change for…, N* 80
Figure 35.1: Q2.6.1. If we ask you what the price will be in a week from now, would you get it right for…, %*....80
Figure 35.2: Q2.6.1. If we ask you what the price will be in a week from now, would you get it right for…, N* 81

Figure 35.3: Q2.6.1. If we ask you what the price will be in a week from now, would you get it right for…, N* 81
Figure 36.2: 3.1/3.5. Does your company work mainly with one supplier of…, N of retailers that sell the items 83
Figure 36.3: 3.1/3.5. Does your company work mainly with one supplier of…, N of retailers that sell the items 83
Figure 36.4: 3.1/3.5. Does your company work mainly with one supplier of…, N of retailers that sell the items, disaggregated by number of distinct items on sale 83
Figure 37.1: 3.2. Is your main supplier of basic food products (reference to the list above) in this area?/ 3.6. Is your main supplier of essential non-food products in this area?, % of retailers that sell the items 84
Figure 37.2: 3.2. Is your main supplier of basic food products (reference to the list above) in this area?/ 3.6. Is your main supplier of essential non-food products in this area?, N of retailers that sell the items 84
Figure 37.3: 3.2. Is your main supplier of basic food products (reference to the list above) in this area?/ 3.6. Is your main supplier of essential non-food products in this area?, N of retailers that sell the items 84
Figure 38.1: Q4.1. Considering your customers' current demand, for how many days would your current stocks last?, N=46, % 85
Figure 38.3: Q4.1. Considering your customers' current demand, for how many days would your current stocks last?, N=46, % 86
Figure 38.4: Q4.1. Considering your customers' current demand, for how many days would your current stocks last?, N=46, %, disaggregated by number of distinct items on sale 86
Figure 39.1: Q4.2. If you place an order today, do you expect to receive your products within a week?, N=46, % 86
Figure 39.2: Q4.2. If you place an order today, do you expect to receive your products within a week?, N=46, % 87
Figure 39.3: Q4.2. If you place an order today, do you expect to receive your products within a week?, N=46, % 87
Figure 40.1: Q4.3. Are most of your suppliers geographically located in the same place?, N=46, % 87
Figure 40.2: Q4.3. Are most of your suppliers geographically located in the same place?, N=46, % 87
Figure 40.3: Q4.3. Are most of your suppliers geographically located in the same place?, N=46, % 87
Figure 41.1: Q4.4. Which of the following best describes this market/shop?, % 88
Figure 41.3: Q4.4. Which of the following best describes this market/shop?, % 88
Figure 42.2: Q4.5 – Q4.6. Which of the following applies to this shop?, % 89
Figure 42.3: Q4.5 – Q4.6. Which of the following applies to this shop?, % 89
Figure 42.4: Q4.5 – Q4.6. Which of the following applies to this shop?, % disaggregated by number of distinct items on sale 89
Figure 43.1: Q4.7 – Q4.9. Quality assessment, % 90
Figure 43.2: Q4.7 – Q4.9. Quality assessment, % 90
Figure 43.3: Q4.7 – Q4.9. Quality assessment, % 90
Figure 44.1: Q4.10. – Q4.11. Access assessment, % 91
Figure 44.2: Q4.10. – Q4.11. Access assessment, % 91
Figure 44.3: Q4.10. – Q4.11. Access assessment, % 92
Figure 45.1: Q5.1. What are the main problems with selling the products that you have faced during the same period of the year?/ Q5.2. What are the main problems with selling the products that you have faced currently?, N=46, % 93
Figure 45.2: Q5.1. What are the main problems with selling the products that you have faced during the same period of the year?/ Q5.2. What are the main problems with selling the products that you have faced currently?, N=46, % 93

Figure 45.3: Q5.1. What are the main problems with selling the products that you have faced during the same period of the year?/ Q5.2. What are the main problems with selling the products that you have faced currently?, N=46, % 94
Figure 46.1: Q5.3. How do you cope with these problems?, N=46, % 94
Figure 46.2: Q5.3. How do you cope with these problems?, N=46, % 95
Figure 46.3: Q5.3. How do you cope with these problems?, N=46, % 95
Figure 47.1: Q5.4. Do you expect any changes in the work of your company in the near future due to the conflict in Ukraine?, N=46, % 95
Figure 47.2: Q5.4. Do you expect any changes in the work of your company in the near future due to the conflict in Ukraine?, N=46, % 96
Figure 47.3: Q5.4. Do you expect any changes in the work of your company in the near future due to the conflict in Ukraine?, N=46, % 96
Figure 48.1: Q6.1. Are there bank branches in your locality and are they currently open?, N=46, % 97
Figure 48.2: Q6.1. Are there bank branches in your locality and are they currently open?, N=46, % 97
Figure 48.3: Q6.1. Are there bank branches in your locality and are they currently open?, N=46, % 98
Figure 49.1: Q6.2. Are there any ATMs in your locality and are they working?, N=46, % 98
Figure 49.2: Q6.2. Are there any ATMs in your locality and are they working?, N=46, % 98
Figure 49.3: Q6.2. Are there any ATMs in your locality and are they working?, N=46, % 99
Figure 50.1: Q6.3 – Q6.4. How far away is the nearest bank located? How far away is the nearest ATM located?, N=46, % 99
Figure 50.2: Q6.3 – Q6.4. How far away is the nearest bank located? How far away is the nearest ATM located?, N=46, % 99
Figure 50.3: Q6.3 – Q6.4. How far away is the nearest bank located? How far away is the nearest ATM located?, N=46, % 100
Figure 51.1: Q6.5. Are other financial services available in your locality (national and international financial transfers)?, N=46, % 100
Figure 51.3: Q6.5. Are other financial services available in your locality (national and international financial transfers)?, N=46, % 101
Figure 52.1: Q6.6. The financial service providers work…., N=46, % 101
Figure 52.2: Q6.6. The financial service providers work…., N=46, % 101
Figure 52.3: Q6.6. The financial service providers work…., N=46, % 101
Figure 53.1: Q6.7. How far away is the nearest financial service provider located?, N=46, % 102
Figure 53.2: Q6.7. How far away is the nearest financial service provider located?, N=46, % 102
Figure 53.3: Q6.7. How far away is the nearest financial service provider located?, N=46, % 102
Figure 54.1: Q7.1. Is this payment method currently accepted in your store?, N=46, % 102
Figure 54.2: Q7.1. Is this payment method currently accepted in your store?, N=46, % 103
Figure 54.3: Q7.1. Is this payment method currently accepted in your store?, N=46, % 103
Figure 54.4: Q7.1. Is this payment method currently accepted in your store?, N=46, % disaggregated by number of distinct items on sale 103
Figure 55.1: Q7.2 Are there any restrictions on using…, N=46, % 104
Figure 55.2: Q7.2 Are there any restrictions on using…, N=46, % (yes) 104
Figure 55.3: Q7.2 Are there any restrictions on using…, N=46, % (yes) 104
Figure 56: Q7.3 . Does the markup apply to buyers using…, N=46, % 105
Figure 57.1: Q7.4. Does this store allow customers to use credit cards to withdraw cash from their account?, % 105

Figure 57.2: Q7.4. Does this store allow customers to use credit cards to withdraw cash from their account?, % 105
Figure 57.3: Q7.4. Does this store allow customers to use credit cards to withdraw cash from their account?, % 106
Figure 57.4: Q7.4. Does this store allow customers to use credit cards to withdraw cash from their account?, % disaggregated by number of distinct items on sale 106

Tables:

Table 1. Retailer survey sample distribution 13
Table 2. Customer survey population and sample geographic distribution 13
Table 3.1: Q2.5. What is the current price for the following items? Please evaluate the cheapest available products of this type. Median (Food items) 41
Table 3.2: Q2.5. What is the current price for the following items? Please evaluate the cheapest available products of this type. Median (Food items) 42
Table 3.3: Q2.5. What is the current price for the following items? Please evaluate the cheapest available products of this type. Median (Food items) 42
Table 4.1: Q2.5. What is the current price for the following items? Please evaluate the cheapest available products of this type. Median (Non-food items and fuel) 43
Table 4.2: Q2.5. What is the current price for the following items? Please evaluate the cheapest available products of this type. Median (Non-food items and fuel) 44
Table 4.3: Q2.5. What is the current price for the following items? Please evaluate the cheapest available products of this type. Median (Non-food items and fuel) 45
Table 5: Basic food and hygiene products consumption costs, per person 82
Table 6: Where is your main supplier of…, N* of respondents whose main supplier is outside their area 84
Table 7: If another region, please specify, N* of respondents whose main supplier is in another region of Moldova 84
Table 8: Where do most of the goods come from your main supplier of…, N* of respondents whose main supplier is in their area 85
Table 9.1: If another region or country, please specify. N* of respondents whose main supplier is in their area and mainly gets their goods from another region of Moldova 85
Table 9.2: If another region or country, please specify. N* of respondents whose main supplier is in their area and mainly gets their goods from another region of Moldova 85

ACRONYMS

ATU Gagauzia - Autonomous Territorial Unit of Gagauzia

CATI - Computer Assisted Telephone Interview

MDL – Moldovan Leu

MPCA – Multi-Purpose Cash Assistance

N – number of respondents

NGO – Non-Governmental Organization

P.P. – percentage points

RAC – Refugee Accommodation Centre

RM – Republic of Moldova

TAPI - Tablet Assisted Personal Interview

UN – United Nations

UNHCR - United Nations High Commissioner for Refugees in Moldova

INTRODUCTION

This study was carried out by *Magenta Consulting* for United Nations High Commissioner for Refugees. Data collection was conducted between 12 May – 9 June 2023.

i.1 Purpose of the research

The purpose of the study is to inform the Cash Working Group and other humanitarian actors of evolutions in prices (including inflation at micro and macro level), availability of goods and market functionality, and provide evidence base information for the organization of MPCA in Moldova as a response to the humanitarian crisis in the country. The following research questions are foreseen to be answered at minimum: what the prices and availability of basic food and non-food items are in markets throughout Moldova, and how these vary over time; what disruptions in supply chains and market accessibility for any key commodities the traders or consumers are facing or could face; to what extent market operations and functionality have changed over time.

The **objectives** of the market assessment and monitoring are:

- Assess and track prices, availability, and accessibility of basic commodities in the market on quarterly basis,
- Assess the impact of the current humanitarian crisis and the sessional needs changes (such as winter) on the market systems,
- Assess the capacities in supply chain and market system to respond to increased demand,
- Contribute to a broader understanding of the market environment for the benefit of humanitarian actors across all sectors.

i.2 Methodology

A combination of qualitative and quantitative method was employed for the research. The following activities were conducted:

1. **20 Key Informant interviews** were conducted with Cash Working Group partners and organizations that indicated they have provided or facilitated cash assistance. The respondents were invited to participate using a list approved by the beneficiary. The interviews were conducted online using Google Meet or face-to-face, based on the respondents' preferences.

2. **Retailer survey** on 46 retailers, to gain a better understanding on how the different markets operate, to assess the commodity prices, accessibility to the market and the market capacities to response increasing demand.

Method: face-to-face TAPI (Tablet Assisted Personal Interview) method
Sample size: 46 retailers (markets, open markets, supermarkets, non-food items shops)
Respondents: trader representative responsible for the purchase or has a role in decision-making
Geography: national (Right Bank of r.Nistru)

3. **Customer survey** on a sample of 191 households, to provide a customer's perspective to the exercise on the functionality of marketplaces, observations on the prices.

Method: face-to-face TAPI (Tablet Assisted Personal Interview) method for the Right Bank data collection; CATI (Computer Assisted Telephone Interview) method of Left Bank data collection[1]

[1] For the Transnistria region, only refugees were included in the survey through telephone interviews, with the citizens and retailers have not been included. The main reasons for this were difficulties related to logistical arrangements that would allow conducting data collection in the region and time limits.

Sampling technique: proportional stratified probabilistic sample
Sample size: 191 households - 108 refugees from Ukraine and 83 RM citizens
Respondents: retail customers aged 18+
Geography: Right and Left Banks
Margin of error: +-11 at 95% confidence level

Samples

Below is presented the tables that contains the regional distribution of the sample. A judgement sampling method was used to include at least one of the following included in each region: smaller markets, chain supermarkets, non-food items shops and open markets. The number of questionnaires in each region were distributed roughly equally, with a slight larger number of questionnaires for Chisinau due to concentration of population. These approach was selected because of a small sample, lack of statistical data for the distribution of retailers and to insure having retailers of varied sizes and from various regions participate in the study.

The settlements were selected from the group of localities randomly selected for the customer survey. While the data was collected, it was ensured that retailers from both urban and rural areas were included, with having at least one retailer in rural areas of each region. The number of questionnaire for rural areas was much lower than in urban areas, and was chosen purposefully based on the population distribution.

Table 1. Retailer survey sample distribution

	Nr. of q-res
North[2]	11
Centre[3]	10
Chisinau	14
South[4]	11
Total	**46**

The sample for RM population is a proportional probabilistic sample at the regional level. The RM citizens sample was calculated based on the National Bureau of Statistics data “Resident population (2019)”. The refugee sample distribution was calculated based on the data provided by the beneficiary. The sample includes a subsample of refugees living on the Left Bank (Transnistrian region).

Table 2. Customer survey population and sample geographic distribution

		Nr. of q-res	
		Refugees Sample	**RM citizens Sample**
North[5]	Urban	12	9
	Rural	9	14
Centre[6]	Urban	5	5
	Rural	2	17
Chisinau	Urban	34	19
	Rural	1	2
South[7]	Urban	9	5
	Rural	6	13
Transnistria		29	-
Total		**105**	**75**

[2] Retailer survey: Northern region included Balti, Briceni and Floresti rayons
[3] Retailer survey: Central region included Orhei, Ialoveni and Straseni rayons
[4] Retailer survey: Southern region included ATU Gagauzia, Causeni and Cimisilia rayons
[5] Customer survey: Northern region included Balti, Floresti, Briceni, Glodeni, Donduseni, Ocnita rayons
[6] Customer survey: Central region included Anenii noi, Hancesti, Ialoveni, Orhei, Straseni rayons
[7] Customer survey: Southern region included ATU Gagauzia, Basarabeasca, Causeni, Cimislia, Stefan Voda

Rayon, settlement, household and respondent selection

The country was divided into 4 regions: North, Centre, Chisinau and South. Both urban and rural settlements were included in the sample.

For the refugees sample (including the Transnistria region respondents), telephone numbers were offered by the client, and these were used to set up face-to-face interviews in the randomly selected urban and rural settlements. For Transnistrian region, the refugees were randomly selected from the contacts offered by the beneficiary, and the data was collected via the telephone. For the RM citizens sample, the settlements were also selected randomly.

Respondent selection

For the RM citizens, the starting points for the interviewer routes were selected randomly in each settlement, with multiple starting points for each settlement. The interviewers moved using a +2 statistical step when choosing households that were invited to participate in the study. The interviewer knocked on the door of the household selected using the statistical step and asked the household member that answered the door which of the household members aged 18+ last celebrated their birthday. If the potential identified respondent had been away from home (for example, working abroad), the interviewer chose the person whose birthday was before the birthday of the first selected person. Before starting the interview, the interviewer asked the person whether they were the one that made decisions / had information about the purchases of food and non-food items made by the household; if they were, then the interviewer invited the person to participate in the survey. If not, the person mainly responsible for shopping in the household was then identified. If the household refused to participate in the survey, the interviewer moved to the next household.

For the retailer survey, retailers were approached and invited to participate, ensuring to include different types of retailers in every region. In case of urban localities, the interviewers would approach a randomly selected shop of the needed type, in the area where customer questionnaires were collected. In case of rural localities, interviewers would approach the most sizeable / central shops. While interviewers would approach the more sizeable retailers, proximity was not specifically calculated to the customer survey participant's dwelling.

i.2.1 Data collection process

Questionnaire elaboration

The questionnaire for the retailer and customer surveys were prepared by Cash Working Group partners who volunteer for the task and have expertise on Monitoring and Evaluation. The questionnaire was reviewed/adjusted by Magenta in close collaboration with the client. After the English questionnaire was finalized, it was translated into Romanian and Russian. The key informant interviews were conducted following a semi-structured interview guide, developed by Magenta in close collaboration with the beneficiary.

Interviewers' selection and training

A team of 25 interviewers with considerate experience in conducting surveys were selected. The team of interviewers was trained in the purpose of the project, the types of answers to be expected from the respondents, how to record the answers and follow the instructions in the questionnaire. All interviews were conducted in the language requested by the respondent – Russian or Romanian.

Data input

Interviews were conducted on tablets using Kobo software, using the forms programmed by the client.

Quality Control

Once the data collection process started, simultaneously began the process of monitoring and verification of the work performed by the interviewers.

All completed questionnaires were be checked and a minimum of 10% of questionnaires had spot checks to verify the accuracy of the data recorded and, where necessary, clarify with respondents any inconsistencies in their answers with that of the interviewer. The fieldwork supervisors randomly checked interviewers and accompanied them on some interviews.

Contact information of survey respondents (names, locations or mobile numbers) were collected for callback verifications. At least 30% of the respondents were called to check if the completed questionnaires corresponded to the responses given during call-backs. In case of any kind of suspicion towards the work of an interviewer, the call-backs were performed for all respondents of this specific interviewer. In case of poor work by a specific interviewer, all their questionnaires were removed.

Database checks were performed during the data collection, to ensure the functioning of the programmed tools, the correct introduction of data and logical errors.

i.2.2 Data processing and analysis

After the data collection was completed, the data was cleaned and then processed. Magenta Consulting used statistic software SPSS to analyse survey data. The results for all questions were presented graphically and a descriptive analysis was added for the main findings. Apart from general graphs/tables, data was compared across different groups (refugees vs RM citizens, urban vs rural, regional differences) and the significant findings were commented. Customer survey data were weighted by regional (5 regions) and areal (urban/rural) criteria.

The shares presented in the report are rounded: the sum of the rounded values may vary +-1 percentage points (p.p.). This variation is within the margin of error.

i.3 Limits of the study

This subchapter includes the limitations of the study.

1. The prices reported by customer and retailer survey participants are not precise and represent an approximate assessment by the respondents. It seems that sometimes the respondents mentioned the price of the product that they usually used, and not the cheapest one.
2. Difficulties in finding supermarkets that would accept participating in the retailer survey were encountered. In the retailer survey, 5 supermarkets participated, which was lower than initially planned. In order to compensate low participation of supermarkets, the questionnaires were conducted with other types of retailers, and an additional price-check exercise was conducted in 12 supermarkets in all of 4 regions. During this exercise, prices were collected for the cheapest available variety of the product for which data was collected during the customer survey.
3. Prices for some product categories needed to be standardized to allow a consistent assessment during the data analysis. The prices indicated by respondents living in Transnistria were converted into lei, 1 Transnistrian Ruble = 1.14 Moldovan Lei (rate published by the Transnistrian region bank on May 24, 2023). For 2 product categories - laundry soap and soap - the units of measure were uniformized. Laundry soap is presented in kg, with an estimate of 1 l = 1 kg. Soap is presented in ml, with an estimate 1 bar of soap = 100 g and 1 g = 1 ml.

CHAPTER I: MARKET ASSESSMENT - SURVEY AMONG CUSTOMER

1.1. Profile of the respondents

According to the available statistical data[8] for the RM citizens and refugees, the regional and areal distribution of the sample was calculated, with the collected sample matching the population distribution by regions/areas. Among the customer survey respondents, 57% are refugees (of which a majority had relocated to the Republic of Moldova one year or more ago) and 44% are Moldovan citizens. In terms of the respondent profile, most survey participants are under the age of 55. Both women and men took part in the survey, with women making up the majority of respondents (75% of refugee respondents and 70% of RM citizens).

Figure 1: Category of respondents, N=191, %

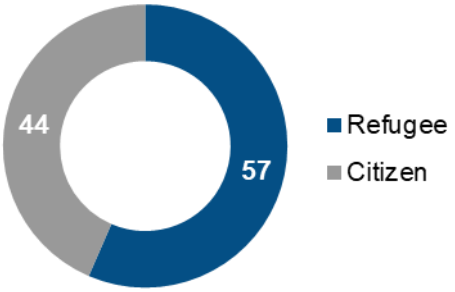
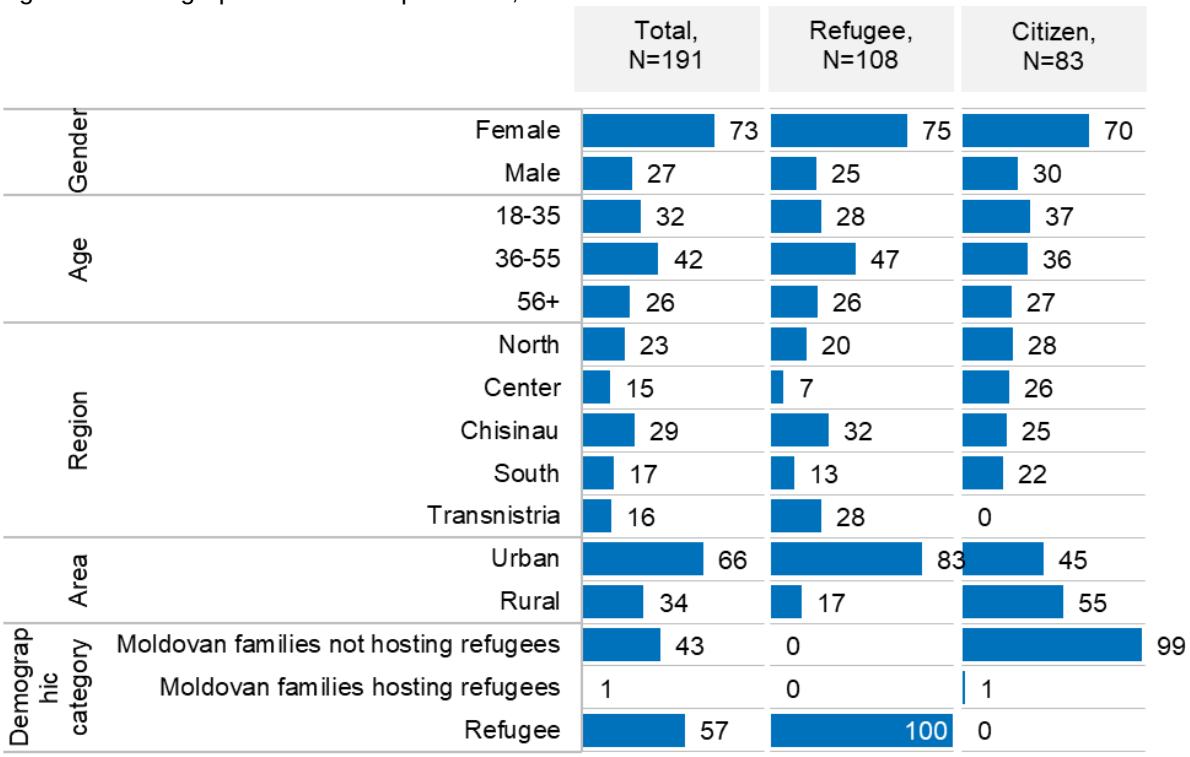
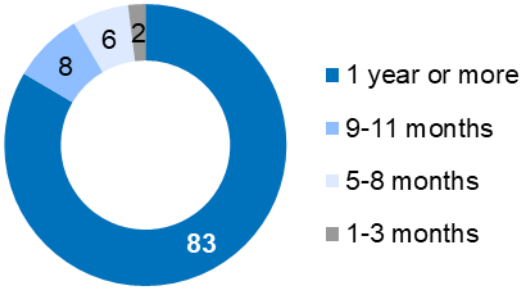


Figure 2: Demographic data of respondents, %



[8] Data source for RM citizens population distribution by region, area, gender and age is the National Bureau of Statistics data "Resident population (2019)". Data source for refugee population distribution by region, area, gender and age – database provided by client.

Figure 3: Duration of refugees' stay in RM, N=108, %



1.2. Availability of markets

Overall, basic food items are widely available for respondents, with more than 90% reporting sufficient availability of products such as bread, pastry, macaroni, corn, rice, potato, vegetable oil, butter, fat, sugar, honey, jams, ice creams, other sweets, dairy products and vegetables. Similarly, hygiene items, drinking water, and electricity appear to be highly available, with more than 90% of respondents reporting sufficient availability. However, challenges exist in accessing certain non-food items, such as gas, cooking and eating utensils, bedding, clothing (including shoes), general medicines, and supportive devices. For these, the availability in sufficient quantities ranges from 54% to 83%. The lowest availability seems to be reported for fuel for vehicles (58%), firewood (35%), and coal (34%).

The data suggests that interviewed refugees generally have better access to all the items compared to the interviewed RM citizens. At the same time, both groups face challenges in accessing essential items, such as fuel for vehicles, firewood, coal and supportive devices. The top most significant differences between the two respondent groups are indicated below:

- Clothing items (including shoes) – sufficient availability indicated by 84% of interviewed refugees and 51% of interviewed citizens
- Gas – sufficient availability indicated by 92% of interviewed refugees and 71% of RM citizens;
- Bedding items - sufficient availability indicated by 79% of interviewed refugees and 59% of interviewed citizens
- Fruit - sufficient availability indicated by 94% of refugees and 76% of citizens
- Beans, lentils, peas - sufficient availability indicated by 98% of refugees and 81% of citizens
- Fuel for vehicles – sufficient availability indicated by 65% of refugees and 48% of citizens.
- Coal – sufficient availability indicated by 41% of interviewed RM citizens and 29% of refugees
- The interviewed citizens specified that fuel for vehicles (33%), clothing items (23%) and bedding (22%) were missing or unavailable.

It appears that respondents from Centre, Chisinau and South mentioned a lower availability of some products in their region, particularly for non-food items. The top products for which there is the largest discrepancy in terms of reported sufficient availability:

- Supportive devices – lowest shares registered for respondents from the South (25%) and those from the Centre (28%)
- Clothing – lowest shares registered for respondents from the Central region (43%) and those from the Southern region (53%)
- Bedding – to a lesser degree, sufficient availability was indicated by 53% of respondents from the South and 49% from the Central region
- Firewood – lowest shares registered for sufficient availability among Chisinau respondents (20%)
- Cooking utensils – lowest sufficient availability indicated by respondents from the Centre of the country (57%).

In terms of differences among urban and rural locations, availability in urban areas is higher than in rural areas for most essential items, particularly for non-food items. The top 4 products that were reported by urban respondents as more available in sufficient quantities were:

- Bedding (83% of respondents in urban areas vs 44% - of those in rural areas)
- Clothes (81% urban vs 46% rural areas)
- Supportive devices (65% urban vs 31% rural)
- Cooking and eating utensils (88% in urban areas vs. 61% in rural areas).
- On the other hand, firewood was evaluated as sufficiently available to respondents living in villages than to those living in towns.

Figure 4.1: Q2.1. Please indicate the current level of availability in stores and markets in your community/region for each of the following, %

% per row		Total, N=191			
		Available in sufficient quantity	Insufficient amount of goods	The product is missing	I don't know
Food items	Bread, pastry, macaroni, Corn, rice	96	4	0	1
	Potato	95	4	1	1
	Vegetable oil, butter, fat	94	4	1	1
	Sugar, honey, jams, ice creams, sweets	93	5	1	0
	Vegetables	93	7	0	0
	Dairy products	91	5	1	3
	Beans, lentils, peas	90	4	3	2
	Meat, fish, eggs	88	8	2	2
	Fruits	86	12	1	1
Non-food items	Hygiene NFIs	96	3	0	1
	Drinking water	94	2	2	2
	Cooking and eating utensils	79	11	4	5
	Bedding	70	12	11	6
	Clothing (including shoes)	70	16	11	3
Healthcare items	General medicines	75	19	6	1
	Supportive devices	54	7	6	33
Fuel	Electricity	96	3	1	0
	Gas	83	4	10	3
	Fuel for vehicles	58	4	16	22
	Firewood	35	20	9	36
	Coal	34	7	16	43

Figure 4.2: Q2.1. Please indicate the current level of availability in stores and markets in your community/region for each of the following, %

% per row		Refugee, N=108			
		Available in sufficient quantity	Insufficient amount of goods	The product is missing	I don't know
Food items	Bread, pastry, macaroni, Corn, rice	99	1	0	0
	Potato	96	4	0	0
	Vegetable oil, butter, fat	99	0	0	1
	Sugar, honey, jams, ice creams, sweets	98	2	0	0
	Vegetables	99	1	0	0
	Dairy products	97	2	0	2
	Beans, lentils, peas	98	1	0	2
	Meat, fish, eggs	93	6	0	1
	Fruits	94	6	0	0
Non-food items	Hygiene NFIs	98	2	0	0
	Drinking water	100	0	0	0
	Cooking and eating utensils	86	4	2	8
	Bedding	79	9	3	10
	Clothing (including shoes)	84	11	2	4
Healthcare items	General medicines	78	16	5	1
	Supportive devices	60	2	1	37
Fuel	Electricity	100	0	0	0
	Gas	92	1	2	5
	Fuel for vehicles	65	0	4	31
	Firewood	32	10	2	57
	Coal	29	2	4	66

Figure 4.3: Q2.1. Please indicate the current level of availability in stores and markets in your community/region for each of the following, %

% per row		Citizen, N=83			
		Available in sufficient quantity	Insufficient amount of goods	The product is missing	Don't know
Food items	Bread, pastry, macaroni, Corn, rice	90	8	0	1
	Potato	92	4	1	2
	Vegetable oil, butter, fat	89	10	1	0
	Sugar, honey, jams, ice creams, sweets	87	10	3	0
	Vegetables	85	15	0	0
	Dairy products	84	9	3	4
	Beans, lentils, peas	81	9	8	3
	Meat, fish, eggs	82	10	5	4
	Fruits	76	21	2	1
Non-food items	Hygiene NFIs	94	4	1	1
	Drinking water	87	4	5	4
	Cooking and eating utensils	70	21	7	2
	Bedding	59	17	22	1
	Clothing (including shoes)	51	24	23	3
Health care items	General medicines	70	22	8	0
	Supportive devices	45	15	13	27
Fuel	Electricity	90	8	2	0
	Gas	71	7	20	1
	Fuel for vehicles	48	8	33	11
	Firewood	40	33	18	9
	Coal	41	13	32	14

Figure 4.4: Q2.1. Please indicate the current level of availability in stores and markets in your community/region for each of the following, %

% per row		North, N=44			
		Available in sufficient quantity	Insufficient amount of goods	The product is missing	Don't know
Food items	Bread, pastry, macaroni, Corn, rice	90	10	0	0
	Potato	92	4	2	2
	Vegetable oil, butter, fat	96	4	0	0
	Sugar, honey, jams, ice creams, sweets	98	2	0	0
	Vegetables	94	6	0	0
	Dairy products	92	4	2	2
	Beans, lentils, peas	83	13	4	0
	Meat, fish, eggs	87	8	2	2
	Fruits	82	16	2	0
Non-food items	Hygiene NFIs	98	2	0	0
	Drinking water	98	0	2	0
	Cooking and eating utensils	86	8	2	4
	Bedding	75	12	13	0
	Clothing (including shoes)	80	9	11	0
Health care items	General medicines	76	14	11	0
	Supportive devices	65	9	6	20
Fuel	Electricity	93	2	5	0
	Gas	80	5	15	0
	Fuel for vehicles	64	5	16	15
	Firewood	41	31	15	13
	Coal	47	17	15	20

Figure 4.5: Q2.1. Please indicate the current level of availability in stores and markets in your community/region for each of the following, %

% per row		Center, N=29			
		Available in sufficient quantity	Insufficient amount of goods	The product is missing	Don't know
Food items	Bread, pastry, macaroni, Corn, rice	100	0	0	0
	Potato	96	0	0	4
	Vegetable oil, butter, fat	96	0	0	4
	Sugar, honey, jams, ice creams, sweets	97	3	0	0
	Vegetables	82	18	0	0
	Dairy products	96	0	0	4
	Beans, lentils, peas	93	4	0	4
	Meat, fish, eggs	93	4	0	4
	Fruits	79	18	4	0
Non-food items	Hygiene NFIs	97	0	3	0
	Drinking water	93	3	0	4
	Cooking and eating utensils	57	28	4	11
	Bedding	49	18	18	15
	Clothing (including shoes)	43	18	29	11
Health care items	General medicines	69	28	4	0
	Supportive devices	28	21	0	51
Fuel	Electricity	97	3	0	0
	Gas	79	4	10	7
	Fuel for vehicles	43	10	22	25
	Firewood	36	47	0	17
	Coal	25	7	21	47

Figure 4.6: Q2.1. Please indicate the current level of availability in stores and markets in your community/region for each of the following, %

% per row		Chisinau, N=55			
		Available in sufficient quantity	Insufficient amount of goods	The product is missing	Don't know
Food items	Bread, pastry, macaroni, Corn, rice	93	5	0	2
	Potato	96	4	0	0
	Vegetable oil, butter, fat	88	10	2	0
	Sugar, honey, jams, ice creams, sweets	84	12	4	0
	Vegetables	92	8	0	0
	Dairy products	85	9	2	4
	Beans, lentils, peas	88	2	8	2
	Meat, fish, eggs	80	11	5	4
	Fruits	87	11	0	2
Non-food items	Hygiene NFIs	91	7	0	2
	Drinking water	86	4	6	4
	Cooking and eating utensils	82	6	7	5
	Bedding	77	7	9	7
	Clothing (including shoes)	74	15	9	2
Health care items	General medicines	81	17	2	0
	Supportive devices	65	0	11	23
Fuel	Electricity	92	8	0	0
	Gas	84	6	7	3
	Fuel for vehicles	53	0	15	31
	Firewood	20	6	17	57
	Coal	24	2	21	53

Figure 4.7: Q2.1. Please indicate the current level of availability in stores and markets in your community/region for each of the following, %

% per row		South, N=33			
		Available in sufficient quantity	Insufficient amount of goods	The product is missing	Don't know
Food items	Bread, pastry, macaroni, Corn, rice	100	0	0	0
	Potato	90	10	0	0
	Vegetable oil, butter, fat	97	3	0	0
	Sugar, honey, jams, ice creams, sweets	97	3	0	0
	Vegetables	98	2	0	0
	Dairy products	91	9	0	0
	Beans, lentils, peas	100	0	0	0
	Meat, fish, eggs	91	9	0	0
	Fruits	88	12	0	0
Non-food items	Hygiene NFIs	100	0	0	0
	Drinking water	100	0	0	0
	Cooking and eating utensils	75	15	6	3
	Bedding	53	26	18	3
	Clothing (including shoes)	53	32	9	7
Health care items	General medicines	69	28	2	0
	Supportive devices	25	10	9	57
Fuel	Electricity	100	0	0	0
	Gas	82	2	16	0
	Fuel for vehicles	56	6	28	10
	Firewood	54	20	3	22
	Coal	49	6	19	26

Figure 4.8: Q2.1. Please indicate the current level of availability in stores and markets in your community/region for each of the following, %

% per row		Transnistria, N=30			
		Available in sufficient quantity	Insufficient amount of goods	The product is missing	Don't know
Food items	Bread, pastry, macaroni, Corn, rice	100	0	0	0
	Potato	100	0	0	0
	Vegetable oil, butter, fat	100	0	0	0
	Sugar, honey, jams, ice creams, sweets	97	3	0	0
	Vegetables	100	0	0	0
	Dairy products	97	0	0	3
	Beans, lentils, peas	93	0	0	7
	Meat, fish, eggs	97	3	0	0
	Fruits	97	3	0	0
Non-food items	Hygiene NFIs	100	0	0	0
	Drinking water	100	0	0	0
	Cooking and eating utensils	90	7	0	3
	Bedding	90	3	0	7
	Clothing (including shoes)	90	10	0	0
Health care items	General medicines	72	10	14	3
	Supportive devices	72	3	0	24
Fuel	Electricity	100	0	0	0
	Gas	93	0	0	7
	Fuel for vehicles	72	0	0	28
	Firewood	34	0	0	66
	Coal	24	0	0	76

Figure 4.9: Q2.1. Please indicate the current level of availability in stores and markets in your community/region for each of the following, %

% per row		Urban, N=126			
		Available in sufficient quantity	Insufficient amount of goods	The product is missing	Don't know
Food items	Bread, pastry, macaroni, Corn, rice	97	3	0	1
	Potato	97	3	1	0
	Vegetable oil, butter, fat	94	4	1	1
	Sugar, honey, jams, ice creams, sweets	91	7	2	0
	Vegetables	95	5	0	0
	Dairy products	92	4	2	2
	Beans, lentils, peas	91	3	3	3
	Meat, fish, eggs	89	8	1	3
	Fruits	90	9	0	1
Non-food items	Hygiene NFIs	95	3	1	1
	Drinking water	93	2	3	2
	Cooking and eating utensils	88	5	2	5
	Bedding	83	8	3	5
	Clothing (including shoes)	81	12	4	2
Health care items	General medicines	78	17	5	1
	Supportive devices	65	2	4	28
Fuel	Electricity	94	5	1	0
	Gas	90	4	2	4
	Fuel for vehicles	64	2	6	28
	Firewood	29	12	6	53
	Coal	31	5	8	56

Figure 4.10: Q2.1. Please indicate the current level of availability in stores and markets in your community/region for each of the following, %

% per row		Rural, N=65			
		Available in sufficient quantity	Insufficient amount of goods	The product is missing	Don't know
Food items	Bread, pastry, macaroni, Corn, rice	93	7	0	0
	Potato	91	6	0	3
	Vegetable oil, butter, fat	95	5	0	0
	Sugar, honey, jams, ice creams, sweets	98	2	0	0
	Vegetables	90	10	0	0
	Dairy products	90	7	0	3
	Beans, lentils, peas	90	5	3	2
	Meat, fish, eggs	87	7	4	1
	Fruits	78	19	3	0
Non-food items	Hygiene NFIs	99	1	0	0
	Drinking water	97	0	1	2
	Cooking and eating utensils	61	23	9	6
	Bedding	44	21	28	7
	Clothing (including shoes)	46	24	25	5
Health care items	General medicines	68	23	9	0
	Supportive devices	31	17	10	41
Fuel	Electricity	99	0	1	0
	Gas	71	3	24	2
	Fuel for vehicles	45	8	37	10
	Firewood	47	34	15	4
	Coal	40	10	31	19

Based on the collected data, bread, pastry, macaroni, corn, rice, and vegetables are staple foods regularly purchased by respondents, with 80% reporting purchasing the products at least several times a week. Similarly, potatoes, vegetable oil, butter, fat, and sugar, honey, jams, ice creams, other sweets are commonly bought by respondents. On the other hand, items like bedding, cooking and eating utensils, and clothing (including shoes) appear to be less purchased, especially bedding, which over 45% of respondents do not buy.

The data also indicates disparities in purchasing patterns between refugees and citizens for certain products. The top four products for which there are the most significant differences in terms of at least weekly purchases:

- Meat, fish, eggs - 58% of interviewed refugees, compared to 32% of citizens
- Drinking water - 53% of interviewed refugees, vs. 29% of citizens
- Fuel for vehicles – 38% of citizens, compared to 13% of refugees
- Fruit – 79% of refugees, compared to 63% of citizens.

The interviewed refugees buy fuel, particularly firewood and coal, bedding, beans and lentils to a lesser degree than compared to RM citizens. On the other hand, RM citizen mentioned to a higher degree not purchasing drinking water and meat/fish/eggs, compared to refugees.

There are differences in purchase frequency when considering the region of the respondents. The top four products for which there are the most significant regional differences in terms of weekly/daily purchases:

- Vegetables – lowest rates registered among respondents from the Central (11%) and Southern regions (15%)
- Drinking water – respondents from the Center (28%) and South (25%) purchase the product more rarely
- Potatoes – respondents from the Central region have the lowest share at 28%
- Sugar, honey, jams, ice cream and other sweets – 18% of respondents from Transnistria mentioned purchasing the items at least weekly
- Moreover, most of respondents from Chisinau and Transnistria do not usually purchase firewood or coal.

There are also differences among urban and rural locations in terms of regular purchase frequency – for the most part, respondents from towns/cities are buying items more often than the respondents that live in villages. The biggest differences in weekly or daily purchases are noted for:

- Drinking water (57% of urban respondents vs 15% of rural respondents)
- Meat/fish/eggs (56% urban vs 28% rural)
- Potatoes (57% urban vs 34% rural).

Moreover, the products that the rural respondents do not buy, compared to urban respondents, are drinking water (74% rural vs 33% urban), supportive devices (81% rural vs 60% urban) and meat/fish/eggs (23% rural vs 6% urban). On the other hand, some products are not usually purchased by those from urban areas to a larger degree – firewood (85% urban vs 20% rural), coal (91% urban vs 62% rural), and less so, fuel for vehicles (63% urban vs 49% rural).

Respondents that mentioned that supportive devices are less available indicated they didn't buy these goods to a larger degree (69%), compared to those that mentioned the goods being available in sufficient quantity (47%). Roughly half of the interviewees that reported firewood was available sufficiently in the region and about one-third of those that mentioned firewood was insufficient reported not buying this item.

Figure 5.1: Q2.2. How regularly are you buying these items?, %

% per row		Total, N=191					
		Every day	Several times a week or every week	Several times a month or every month	Once in every 2-3 months	Several times a year or less frequently	Don't buy
Food items	Bread, pastry, macaroni, Corn, rice	26	54	15	1	0	3
	Potato	4	45	31	4	1	14
	Vegetable oil, butter, fat	3	23	50	8	1	16
	Sugar, honey, jams, ice creams, sweets	4	28	44	8	3	13
	Vegetables	13	63	18	1	1	4
	Dairy products	15	60	14	2	0	10
	Beans, lentils, peas	3	8	32	16	8	32
	Meat, fish, eggs	3	43	33	7	1	12
	Fruits	12	60	19	5	0	4
Non-food items	Hygiene NFIs	3	13	53	11	2	18
	Drinking water	14	29	7	2	2	47
	Cooking and eating utensils	2	1	1	6	41	49
	Bedding	2	1	1	4	47	45
	Clothing (including shoes)	3	1	9	34	31	22
Healthcare items	General medicines	2	16	42	25	9	7
	Supportive devices	3	3	8	8	11	67
Fuel	Electricity	20	3	63	0	1	13
	Gas	17	4	51	6	2	20
	Fuel for vehicles	5	19	14	2	2	58
	Firewood	1	2	2	1	31	63
	Coal	1	2	1	1	14	81

Figure 5.2: Q2.2. How regularly are you buying these items?, %

% per row		Refugee, N=108					
		Every day	Several times a week or every week	Several times a month or every month	Once in every 2-3 months	Several times a year or less frequently	Don't buy
Food items	Bread, pastry, macaroni, Corn, rice	21	55	18	2	0	5
	Potato	4	49	29	1	1	16
	Vegetable oil, butter, fat	1	23	59	4	0	13
	Sugar, honey, jams, ice creams, sweets	3	30	48	2	2	15
	Vegetables	17	63	17	1	1	1
	Dairy products	15	65	9	2	0	9
	Beans, lentils, peas	1	10	36	7	4	42
	Meat, fish, eggs	3	55	32	6	0	4
	Fruits	16	63	15	3	0	3
Non-food items	Hygiene NFIs	1	11	55	7	0	26
	Drinking water	17	36	10	1	0	36
	Cooking and eating utensils	0	0	2	4	36	57
	Bedding	0	0	1	5	38	56
	Clothing (including shoes)	0	0	14	39	20	27
Healthcare items	General medicines	0	19	45	21	10	5
	Supportive devices	3	3	12	8	12	62
Fuel	Electricity	21	1	60	0	0	18
	Gas	18	1	54	1	1	25
	Fuel for vehicles	2	11	21	2	0	64
	Firewood	0	1	2	1	11	85
	Coal	0	0	1	1	2	96

Figure 5.3: Q2.2. How regularly are you buying these items?, %

% per row		Citizen, N=83					
		Every day	Several times a week or every week	Several times a month or every month	Once in every 2-3 months	Several times a year or less frequently	Don't buy
Food items	Bread, pastry, macaroni, Corn, rice	33	54	12	0	0	1
	Potato	4	41	34	9	1	12
	Vegetable oil, butter, fat	5	22	38	14	2	19
	Sugar, honey, jams, ice creams, sweets	5	26	39	16	4	11
	Vegetables	8	63	20	1	0	8
	Dairy products	15	53	20	1	1	11
	Beans, lentils, peas	5	6	26	29	14	20
	Meat, fish, eggs	4	28	35	8	3	23
	Fruits	8	55	24	8	0	5
Non-food items	Hygiene NFIs	6	16	49	16	4	8
	Drinking water	10	19	5	3	4	60
	Cooking and eating utensils	4	3	0	8	48	38
	Bedding	4	3	0	2	60	31
	Clothing (including shoes)	6	3	3	29	45	15
Healthcare items	General medicines	4	12	38	29	8	9
	Supportive devices	4	3	2	7	10	74
Fuel	Electricity	18	6	68	0	1	6
	Gas	17	6	46	12	5	14
	Fuel for vehicles	8	30	5	1	5	51
	Firewood	3	3	3	1	57	34
	Coal	1	5	0	1	30	63

Figure 5.4: Q2.2. How regularly are you buying these items?, %

% per row		North, N=44					
		Every day	Several times a week or every week	Several times a month or every month	Once in every 2-3 months	Several times a year or less frequently	Don't buy
Food items	Bread, pastry, macaroni, Corn, rice	37	44	16	0	0	2
	Potato	11	41	21	3	2	21
	Vegetable oil, butter, fat	6	41	24	6	2	20
	Sugar, honey, jams, ice creams, sweets	13	18	48	13	0	8
	Vegetables	18	46	28	2	0	6
	Dairy products	13	62	10	0	2	12
	Beans, lentils, peas	10	1	29	13	11	35
	Meat, fish, eggs	7	33	39	10	0	11
	Fruits	12	60	20	6	0	2
Non-food items	Hygiene NFIs	10	11	45	12	7	15
	Drinking water	13	32	5	2	2	46
	Cooking and eating utensils	7	5	1	11	35	41
	Bedding	7	5	0	7	52	29
	Clothing (including shoes)	10	5	6	49	18	12
Health care items	General medicines	5	19	30	16	17	12
	Supportive devices	7	6	3	13	11	60
Fuel	Electricity	19	7	43	0	2	29
	Gas	18	6	19	15	8	34
	Fuel for vehicles	9	21	12	0	2	57
	Firewood	5	5	5	0	41	44
	Coal	2	10	1	0	28	58

Figure 5.5: Q2.2. How regularly are you buying these items?, %

% per row		Center, N=29					
		Every day	Several times a week or every week	Several times a month or every month	Once in every 2-3 months	Several times a year or less frequently	Don't buy
Food items	Bread, pastry, macaroni, Corn, rice	28	61	4	0	0	7
	Potato	0	28	57	7	0	7
	Vegetable oil, butter, fat	0	11	58	17	4	11
	Sugar, honey, jams, ice creams, sweets	0	35	26	14	7	18
	Vegetables	4	72	22	0	0	3
	Dairy products	11	54	32	0	0	4
	Beans, lentils, peas	0	7	37	31	11	15
	Meat, fish, eggs	0	47	32	4	4	14
	Fruits	7	51	32	10	0	0
Non-food items	Hygiene NFIs	0	24	51	11	0	14
	Drinking water	7	21	8	6	7	51
	Cooking and eating utensils	0	0	0	0	53	47
	Bedding	0	0	0	4	60	36
	Clothing (including shoes)	3	0	0	22	53	22
Health care items	General medicines	0	17	43	26	7	7
	Supportive devices	0	0	3	0	18	79
Fuel	Electricity	13	0	81	0	0	7
	Gas	16	7	55	0	4	18
	Fuel for vehicles	0	22	0	7	10	60
	Firewood	0	0	0	4	76	20
	Coal	0	0	0	0	32	68

Figure 5.6: Q2.2. How regularly are you buying these items?, %

% per row		Chisinau, N=55					
		Every day	Several times a week or every week	Several times a month or every month	Once in every 2-3 months	Several times a year or less frequently	Don't buy
Food items	Bread, pastry, macaroni, Corn, rice	21	58	16	2	0	3
	Potato	2	60	17	4	2	16
	Vegetable oil, butter, fat	4	19	59	4	0	14
	Sugar, honey, jams, ice creams, sweets	0	31	53	4	2	9
	Vegetables	10	70	13	2	0	6
	Dairy products	18	60	9	4	0	9
	Beans, lentils, peas	0	19	25	17	6	33
	Meat, fish, eggs	3	53	27	9	2	6
	Fruits	16	64	15	2	0	4
Non-food items	Hygiene NFIs	4	13	46	13	0	24
	Drinking water	26	34	9	0	0	30
	Cooking and eating utensils	0	0	0	10	37	53
	Bedding	0	0	0	0	42	58
	Clothing (including shoes)	0	0	7	41	28	24
Health care items	General medicines	2	7	34	41	7	8
	Supportive devices	5	3	14	9	7	62
Fuel	Electricity	35	6	47	0	0	13
	Gas	31	2	39	2	0	26
	Fuel for vehicles	2	22	10	2	0	65
	Firewood	0	0	2	0	0	98
	Coal	0	0	0	0	0	100

Figure 5.7: Q2.2. How regularly are you buying these items?, %

% per row		South, N=33					
		Every day	Several times a week or every week	Several times a month or every month	Once in every 2-3 months	Several times a year or less frequently	Don't buy
Food items	Bread, pastry, macaroni, Corn, rice	26	61	13	0	0	0
	Potato	3	37	40	6	0	13
	Vegetable oil, butter, fat	0	15	55	9	0	21
	Sugar, honey, jams, ice creams, sweets	6	43	37	6	0	9
	Vegetables	18	70	10	0	0	2
	Dairy products	10	66	9	3	0	12
	Beans, lentils, peas	3	5	36	18	10	28
	Meat, fish, eggs	3	29	34	7	0	27
	Fruits	7	63	13	9	0	9
Non-food items	Hygiene NFIs	0	6	77	6	0	10
	Drinking water	6	19	6	3	0	67
	Cooking and eating utensils	0	0	0	0	55	45
	Bedding	0	0	0	6	48	45
	Clothing (including shoes)	0	0	12	24	39	25
Health care items	General medicines	0	14	50	27	6	3
	Supportive devices	0	0	0	0	6	94
Fuel	Electricity	13	0	83	0	0	3
	Gas	11	0	77	9	0	3
	Fuel for vehicles	10	21	26	0	0	42
	Firewood	0	0	0	3	57	40
	Coal	0	0	0	6	15	79

Figure 5.8: Q2.2. How regularly are you buying these items?, %

% per row		Transnistria, N=30					
		Every day	Several times a week or every week	Several times a month or every month	Once in every 2-3 months	Several times a year or less frequently	Don't buy
Food items	Bread, pastry, macaroni, Corn, rice	17	48	28	3	0	3
	Potato	3	48	38	0	0	10
	Vegetable oil, butter, fat	0	21	59	10	0	10
	Sugar, honey, jams, ice creams, sweets	0	18	50	4	7	21
	Vegetables	14	62	21	0	3	0
	Dairy products	21	55	14	0	0	10
	Beans, lentils, peas	0	3	41	3	3	48
	Meat, fish, eggs	0	52	38	3	0	7
	Fruits	17	59	21	0	0	3
Non-food items	Hygiene NFIs	0	14	52	10	0	24
	Drinking water	7	31	10	0	0	52
	Cooking and eating utensils	0	0	7	3	31	59
	Bedding	0	0	3	3	38	55
	Clothing (including shoes)	0	0	24	24	24	28
Health care items	General medicines	0	28	62	3	7	0
	Supportive devices	0	3	17	14	17	48
Fuel	Electricity	7	0	86	0	0	7
	Gas	0	3	86	0	0	10
	Fuel for vehicles	3	7	24	0	0	66
	Firewood	0	3	3	0	0	93
	Coal	0	0	3	0	0	97

Figure 5.9: Q2.2. How regularly are you buying these items?, %

% per row		Urban, N=126					
		Every day	Several times a week or every week	Several times a month or every month	Once in every 2-3 months	Several times a year or less frequently	Don't buy
Food items	Bread, pastry, macaroni, Corn, rice	23	54	17	2	0	5
	Potato	4	53	29	2	1	12
	Vegetable oil, butter, fat	3	22	55	6	0	13
	Sugar, honey, jams, ice creams, sweets	5	29	46	4	3	13
	Vegetables	15	64	16	1	1	4
	Dairy products	18	60	11	2	0	10
	Beans, lentils, peas	3	11	34	12	4	34
	Meat, fish, eggs	3	53	32	5	1	6
	Fruits	16	63	15	4	0	3
Non-food items	Hygiene NFIs	5	13	52	8	1	21
	Drinking water	19	38	10	1	0	33
	Cooking and eating utensils	3	2	2	8	39	48
	Bedding	3	2	1	2	44	49
	Clothing (including shoes)	4	2	10	36	25	23
Health care items	General medicines	3	19	39	24	10	5
	Supportive devices	5	4	11	8	12	60
Fuel	Electricity	26	4	54	0	1	15
	Gas	23	3	49	1	1	23
	Fuel for vehicles	6	16	13	2	1	63
	Firewood	2	3	3	1	7	85
	Coal	1	3	1	1	3	91

Figure 5.10: Q2.2. How regularly are you buying these items?, %

% per row		Rural, N=65					
		Every day	Several times a week or every week	Several times a month or every month	Once in every 2-3 months	Several times a year or less frequently	Don't buy
Food items	Bread, pastry, macaroni, Corn, rice	32	55	12	0	0	0
	Potato	4	30	36	9	1	20
	Vegetable oil, butter, fat	1	23	39	13	3	21
	Sugar, honey, jams, ice creams, sweets	3	29	41	16	2	10
	Vegetables	9	63	22	1	0	4
	Dairy products	8	60	18	2	1	10
	Beans, lentils, peas	2	2	28	24	16	29
	Meat, fish, eggs	3	25	35	12	2	23
	Fruits	5	55	28	7	0	5
Non-food items	Hygiene NFIs	0	14	54	17	3	13
	Drinking water	4	11	3	3	5	74
	Cooking and eating utensils	0	0	1	2	46	51
	Bedding	0	0	0	7	55	39
	Clothing (including shoes)	0	0	7	32	41	19
Health care items	General medicines	0	10	47	25	7	11
	Supportive devices	0	1	2	7	9	81
Fuel	Electricity	8	1	82	0	0	9
	Gas	7	4	54	14	5	16
	Fuel for vehicles	2	26	16	2	5	49
	Firewood	0	0	2	2	77	20
	Coal	0	0	1	2	35	62

Respondents that mentioned having regularly purchased the essential products were asked to evaluate how the prices for each category changed compared to last year. Across the board, a significant majority of respondents reported an increase in prices for most items. For staple food items like bread, pastry, macaroni, corn, and rice, as well as dairy products and meat/fish/eggs, around 77% of respondents buying these products indicated that prices had increased by up to 50%. Most of those that regularly purchase general medicines (75%) and hygiene items (73%) reported that the price for these products increased by up to half of the last year's price. Those that regularly buy gas (42%), firewood (38%) and coal (30%) assessed that the prices had increased twice or more. 41% of those that buy drinking water and 36% of those that purchase fuel for vehicles mentioned that the prices for these items had remained or decreased compared to last year.

Overall, RM citizens mentioned higher price increase for the items they usually bought, compared to the refugees. The products for which the interviewed RM citizens indicated highest increase were firewood, coal, gas and electricity – at least three in four citizens who use these items have reported a price increase. For several product categories, a higher share of refugees indicated that over the last year prices stayed the same or decreased, compared to citizens - the biggest difference is for the electricity price (23% of refugees vs 8% of citizens reported no increase to the price) and meat/fish/eggs (25% of refugees vs 11% of citizens).

In terms of differences among respondents from different regions, the main findings were the following:

- Respondents from the South reported higher increases for the products they usually purchased – for example, the highest difference was noted for drinking water, vegetable oil/butter/fat, fuel for vehicles and sugar/honey/jams/ice creams/sweets.
- For buyers from the Central region, the highest increases were for some food products (fruit, meat/fish/eggs, bread/pastry/macaroni/corn/rice and vegetables)
- For those from the Northern region, the highest price increase was for non-food items (cooking utensils, clothing, bedding and supportive devices)
- Respondents from Transnistria reported lower increases for gas and electricity.

There were also differences among the responses urban and rural residents regarding the price changes for essential products, with rural interviewees mostly indicating to a higher degree that the prices have increased for food items and fuel. A larger share of urban respondents mentioned that the prices decreased or stayed the same, compared to those living in villages.

Figure 6.1: Q2.3. How has the current price changed for the items you buy compared to the same period last year?, % of respondents that mentioned regularly purchasing the items

% per row		Total								
		N	Decreased	Stayed the same	Increased up to 15%	Increased up to 30%	Increased up to 50%	Increased up to 100%	Increased more than >100%	I don't know
Food items	Bread, pastry, macaroni, Corn, rice	**185**	2	12	42	26	9	4	0	6
	Potato	**164**	1	19	40	18	7	4	0	10
	Vegetable oil, butter, fat	**183**	2	17	33	15	20	6	0	7
	Sugar, honey, jams, ice creams,sweets	**168**	0	12	39	19	8	10	1	10
	Vegetables	**183**	2	10	32	21	15	11	2	7
	Dairy products	**172**	1	13	43	21	12	5	0	6
	Beans, lentils, peas	**129**	2	21	40	12	4	3	0	18
	Meat, fish, eggs	**168**	1	11	26	32	19	2	1	8
	Fruits	**184**	2	13	28	22	18	9	1	6
Non-food items	Hygiene NFIs	**157**	0	16	36	30	7	2	0	9
	Drinking water	**102**	1	40	42	7	3	0	0	7
	Cooking and eating utensils	**98**	0	14	23	21	5	1	1	35
	Bedding	**104**	0	19	20	21	7	2	0	32
	Clothing (including shoes)	**149**	1	16	23	26	7	3	1	22
Health care items	General medicines	**178**	1	9	36	23	16	5	1	10
	Supportive devices	**62**	2	24	22	15	4	0	0	32
Fuel	Electricity	**166**	1	15	17	22	16	11	11	8
	Gas	**152**	3	15	10	9	15	11	32	6
	Fuel for vehicles	**79**	11	25	22	17	10	6	1	8
	Firewood	**71**	0	6	8	11	27	28	10	10
	Coal	**36**	3	12	14	13	14	25	5	13

Figure 6.2: Q2.3. How has the current price changed for the items you buy compared to the same period last year?, % of respondents that mentioned regularly purchasing the items

% per row		Refugee								
		N	Decreased	Stayed the same	Increased up to 15%	Increased up to 30%	Increased up to 50%	Increased up to 100%	Increased more than >100%	I don't know
Food items	Bread, pastry, macaroni, Corn, rice	**103**	1	18	42	22	4	3	0	10
	Potato	**90**	0	24	43	13	2	4	0	13
	Vegetable oil, butter, fat	**63**	2	24	42	5	3	3	0	23
	Sugar, honey, jams, ice creams,sweets	**107**	1	11	38	21	9	11	0	10
	Vegetables	**105**	1	16	36	21	10	10	0	6
	Dairy products	**104**	0	13	33	27	15	2	0	9
	Beans, lentils, peas	**98**	0	16	51	13	11	2	0	8
	Meat, fish, eggs	**94**	1	24	40	10	11	5	0	8
	Fruits	**94**	0	17	42	15	4	8	0	14
Non-food items	Hygiene NFIs	**80**	0	18	45	25	4	0	0	8
	Drinking water	**69**	0	41	45	4	2	0	0	7
	Cooking and eating utensils	**46**	0	13	24	24	4	0	0	36
	Bedding	**47**	0	24	23	17	4	1	0	32
	Clothing (including shoes)	**78**	0	19	26	22	6	4	0	23
Health care items	General medicines	**103**	0	10	40	18	16	5	0	11
	Supportive devices	**41**	0	22	19	18	4	0	0	37
Fuel	Electricity	**88**	1	22	16	20	8	9	11	12
	Gas	**81**	0	23	11	8	11	10	25	11
	Fuel for vehicles	**38**	5	33	27	19	10	0	0	6
	Firewood	**16**	0	14	4	14	14	11	7	37
	Coal	**5**	0	22	0	23	22	0	0	33

Figure 6.3: Q2.3. How has the current price changed for the items you buy compared to the same period last year?, % of respondents that mentioned regularly purchasing the items

% per row		Citizen								
		N	Decreased	Stayed the same	Increased up to 15%	Increased up to 30%	Increased up to 50%	Increased up to 100%	Increased more than >100%	I don't know
Food items	Bread, pastry, macaroni, Corn, rice	**82**	4	4	42	29	15	5	0	1
	Potato	**73**	3	13	37	24	13	4	0	6
	Vegetable oil, butter, fat	**66**	3	19	38	18	4	3	0	14
	Sugar, honey, jams, ice creams,sweets	**76**	4	9	23	23	23	11	5	1
	Vegetables	**79**	3	10	18	24	29	9	3	5
	Dairy products	**64**	2	8	15	39	25	3	2	6
	Beans, lentils, peas	**74**	1	9	33	31	15	9	0	3
	Meat, fish, eggs	**68**	3	8	24	21	32	6	0	6
	Fruits	**74**	0	7	36	23	13	12	3	5
Non-food items	Hygiene NFIs	**76**	0	14	26	35	11	5	0	9
	Drinking water	**33**	3	37	36	13	3	0	0	8
	Cooking and eating utensils	**51**	0	15	22	19	5	2	2	34
	Bedding	**57**	0	15	17	24	9	3	0	31
	Clothing (including shoes)	**71**	2	14	20	30	9	3	3	20
Health care items	General medicines	**75**	1	8	30	29	17	4	3	8
	Supportive devices	**21**	5	29	28	9	4	0	0	24
Fuel	Electricity	**78**	1	7	17	24	25	12	11	3
	Gas	**72**	7	6	9	10	18	11	39	0
	Fuel for vehicles	**41**	17	18	17	14	10	12	3	10
	Firewood	**55**	0	4	9	10	31	34	10	2
	Coal	**31**	3	10	17	12	13	29	6	10

Figure 6.4: Q2.3. How has the current price changed for the items you buy compared to the same period last year?, % of respondents that mentioned regularly purchasing the items

% per row		North								
		N	Decreased	Stayed the same	Increased up to 15%	Increased up to 30%	Increased up to 50%	Increased up to 100%	Increased more than >100%	I don't know
Food items	Bread, pastry, macaroni, Corn, rice	**43**	0	5	30	25	18	9	0	12
	Potato	**35**	0	21	34	21	14	6	0	5
	Vegetable oil, butter, fat	**35**	0	25	32	20	14	0	0	9
	Sugar, honey, jams, ice creams, sweets	**41**	0	20	39	20	8	1	0	11
	Vegetables	**41**	3	7	27	21	19	14	0	9
	Dairy products	**39**	0	8	43	24	9	8	0	8
	Beans, lentils, peas	**29**	0	18	39	14	2	2	0	25
	Meat, fish, eggs	**40**	0	20	20	29	19	0	0	12
	Fruits	**43**	2	16	23	21	24	6	0	7
Non-food items	Hygiene NFIs	**38**	0	17	41	20	11	3	0	9
	Drinking water	**24**	4	47	22	4	2	0	0	19
	Cooking and eating utensils	**26**	0	8	24	34	10	4	0	20
	Bedding	**32**	0	17	15	34	12	5	0	18
	Clothing (including shoes)	**39**	0	23	11	28	15	11	2	10
Health care items	General medicines	**39**	0	12	30	24	16	10	0	8
	Supportive devices	**18**	0	24	23	15	15	0	0	23
Fuel	Electricity	**32**	0	10	16	27	17	10	15	5
	Gas	**29**	7	11	19	12	11	7	33	0
	Fuel for vehicles	**19**	16	23	22	17	13	5	0	5
	Firewood	**25**	0	9	23	8	28	18	12	2
	Coal	**18**	6	12	28	5	16	21	10	3

Figure 6.5: Q2.3. How has the current price changed for the items you buy compared to the same period last year?, % of respondents that mentioned regularly purchasing the items

% per row		Center								
		N	Decreased	Stayed the same	Increased up to 15%	Increased up to 30%	Increased up to 50%	Increased up to 100%	Increased more than >100%	I don't know
Food items	Bread, pastry, macaroni, Corn, rice	**27**	0	12	42	27	16	4	0	0
	Potato	**27**	0	19	34	28	12	0	0	8
	Vegetable oil, butter, fat	**26**	4	16	8	20	44	4	0	4
	Sugar, honey, jams, ice creams, sweets	**24**	0	14	34	17	9	17	0	9
	Vegetables	**28**	0	15	7	45	19	4	11	0
	Dairy products	**28**	0	12	40	33	11	0	0	4
	Beans, lentils, peas	**25**	0	45	34	8	4	0	0	8
	Meat, fish, eggs	**25**	0	4	12	34	42	4	0	4
	Fruits	**29**	0	4	10	53	26	4	0	4
Non-food items	Hygiene NFIs	**25**	0	25	17	42	0	4	0	12
	Drinking water	**14**	0	49	22	15	7	0	0	6
	Cooking and eating utensils	**15**	0	26	7	14	0	0	0	53
	Bedding	**18**	0	16	6	11	6	0	0	62
	Clothing (including shoes)	**23**	0	17	18	18	14	0	0	32
Health care items	General medicines	**27**	4	4	34	35	8	0	4	12
	Supportive devices	**6**	0	32	15	0	0	0	0	52
Fuel	Electricity	**27**	3	7	27	12	19	8	16	8
	Gas	**24**	9	0	0	9	34	9	35	5
	Fuel for vehicles	**11**	9	18	9	28	0	9	9	17
	Firewood	**23**	0	5	0	0	27	50	5	14
	Coal	**9**	0	23	0	10	11	34	0	22

Figure 6.6: Q2.3. How has the current price changed for the items you buy compared to the same period last year?, % of respondents that mentioned regularly purchasing the items

% per row		Chisinau								
		N	Decreased	Stayed the same	Increased up to 15%	Increased up to 30%	Increased up to 50%	Increased up to 100%	Increased more than >100%	I don't know
Food items	Bread, pastry, macaroni, Corn, rice	**53**	6	18	49	22	2	2	0	1
	Potato	**46**	5	18	41	16	5	2	0	13
	Vegetable oil, butter, fat	**47**	2	16	38	6	22	13	0	3
	Sugar, honey, jams, ice creams, sweets	**50**	0	9	33	19	14	14	0	12
	Vegetables	**52**	4	12	32	19	14	16	0	2
	Dairy products	**50**	2	14	37	13	20	10	0	5
	Beans, lentils, peas	**37**	6	21	43	9	6	0	0	16
	Meat, fish, eggs	**52**	2	9	31	33	17	4	0	3
	Fruits	**53**	2	14	29	17	18	16	0	4
Non-food items	Hygiene NFIs	**42**	0	9	45	39	3	0	0	5
	Drinking water	**38**	0	28	57	10	3	0	0	2
	Cooking and eating utensils	**26**	0	11	28	12	4	0	0	45
	Bedding	**23**	0	12	29	19	9	0	0	30
	Clothing (including shoes)	**42**	3	14	36	24	3	0	0	21
Health care items	General medicines	**50**	0	9	35	16	24	4	2	9
	Supportive devices	**21**	5	22	28	13	0	0	0	31
Fuel	Electricity	**48**	2	2	10	29	17	24	9	8
	Gas	**41**	3	0	7	17	12	9	48	5
	Fuel for vehicles	**19**	20	39	15	10	11	0	0	6
	Firewood	**1**	0	0	0	100	0	0	0	0
	Coal	**0**	0	0	0	0	0	0	0	0

Figure 6.7: Q2.3. How has the current price changed for the items you buy compared to the same period last year?, % of respondents that mentioned regularly purchasing the items

% per row		South								
		N	Decreased	Stayed the same	Increased up to 15%	Increased up to 30%	Increased up to 50%	Increased up to 100%	Increased more than >100%	I don't know
Food items	Bread, pastry, macaroni, Corn, rice	**33**	2	10	37	40	3	5	0	3
	Potato	**28**	0	13	53	14	6	10	0	4
	Vegetable oil, butter, fat	**26**	0	8	47	28	13	4	0	0
	Sugar, honey, jams, ice creams, sweets	**30**	0	4	54	20	0	16	7	0
	Vegetables	**32**	0	10	40	16	12	15	3	3
	Dairy products	**29**	0	19	39	26	13	3	0	0
	Beans, lentils, peas	**24**	0	8	42	25	3	8	0	14
	Meat, fish, eggs	**24**	0	18	28	33	11	0	4	5
	Fruits	**30**	0	10	38	14	12	16	7	4
Non-food items	Hygiene NFIs	**30**	0	6	32	32	14	6	0	11
	Drinking water	**11**	0	30	70	0	0	0	0	0
	Cooking and eating utensils	**18**	0	10	26	15	4	0	6	39
	Bedding	**18**	0	22	26	13	0	6	0	34
	Clothing (including shoes)	**25**	0	7	28	31	0	4	4	26
Health care items	General medicines	**32**	0	13	41	20	17	3	0	7
	Supportive devices	**2**	0	0	0	0	0	0	0	100
Fuel	Electricity	**32**	0	2	28	27	26	3	14	0
	Gas	**32**	0	7	12	2	19	26	34	0
	Fuel for vehicles	**19**	5	16	26	27	6	15	0	6
	Firewood	**20**	0	6	0	23	31	21	14	5
	Coal	**7**	0	0	0	41	16	29	0	15

Figure 6.8: Q2.3. How has the current price changed for the items you buy compared to the same period last year?, % of respondents that mentioned regularly purchasing the items

% per row		Transnistria								
		N	Decreased	Stayed the same	Increased up to 15%	Increased up to 30%	Increased up to 50%	Increased up to 100%	Increased more than >100%	I don't know
Food items	Bread, pastry, macaroni, Corn, rice	**29**	0	11	54	14	7	0	0	14
	Potato	**27**	0	27	38	12	0	4	0	19
	Vegetable oil, butter, fat	**27**	4	19	38	4	8	4	0	23
	Sugar, honey, jams, ice creams, sweets	**24**	0	17	39	17	4	0	0	22
	Vegetables	**30**	3	7	52	10	7	0	0	21
	Dairy products	**27**	0	12	62	12	4	0	0	12
	Beans, lentils, peas	**16**	7	13	40	0	0	7	0	33
	Meat, fish, eggs	**28**	0	4	37	30	7	4	0	19
	Fruits	**29**	4	21	43	14	7	0	0	11
Non-food items	Hygiene NFIs	**23**	0	32	36	14	9	0	0	9
	Drinking water	**14**	0	57	36	0	0	0	0	7
	Cooking and eating utensils	**12**	0	25	25	33	0	0	0	17
	Bedding	**13**	0	38	23	15	0	0	0	23
	Clothing (including shoes)	**22**	0	19	19	29	5	0	0	29
Health care items	General medicines	**30**	0	7	41	24	10	3	0	14
	Supportive devices	**16**	0	27	20	27	0	0	0	27
Fuel	Electricity	**28**	0	67	7	7	0	0	0	19
	Gas	**27**	0	65	12	0	0	0	0	23
	Fuel for vehicles	**10**	0	30	40	0	20	0	0	10
	Firewood	**2**	0	0	0	0	0	0	0	100
	Coal	**1**	0	0	0	0	0	0	0	100

Figure 6.9: Q2.3. How has the current price changed for the items you buy compared to the same period last year?, % of respondents that mentioned regularly purchasing the items

% per row		Urban								
		N	Decreased	Stayed the same	Increased up to 15%	Increased up to 30%	Increased up to 50%	Increased up to 100%	Increased more than >100%	I don't know
Food items	Bread, pastry, macaroni, Corn, rice	**120**	3	16	42	23	4	4	0	8
	Potato	**112**	2	25	37	16	4	4	0	12
	Vegetable oil, butter, fat	**110**	2	22	36	8	17	6	0	8
	Sugar, honey, jams, ice creams, sweets	**110**	0	15	40	18	7	8	0	13
	Vegetables	**122**	4	10	36	20	14	9	0	8
	Dairy products	**114**	1	13	45	18	12	3	0	7
	Beans, lentils, peas	**83**	4	25	40	6	5	2	0	18
	Meat, fish, eggs	**118**	1	15	29	31	16	3	0	6
	Fruits	**123**	3	16	31	23	13	8	0	5
Non-food items	Hygiene NFIs	**100**	0	19	41	31	3	1	0	5
	Drinking water	**85**	1	42	43	6	3	0	0	6
	Cooking and eating utensils	**66**	0	15	26	23	3	0	0	33
	Bedding	**65**	0	24	23	21	5	0	0	26
	Clothing (including shoes)	**97**	1	21	26	26	3	2	0	20
Health care items	General medicines	**121**	0	11	39	19	17	5	1	8
	Supportive devices	**50**	2	28	24	14	0	0	0	32
Fuel	Electricity	**107**	2	24	13	20	11	12	10	9
	Gas	**98**	1	22	9	8	12	6	34	8
	Fuel for vehicles	**46**	9	35	24	13	12	2	0	7
	Firewood	**19**	0	17	17	24	11	0	10	22
	Coal	**11**	9	28	28	15	10	0	0	9

Figure 6.10: Q2.3. How has the current price changed for the items you buy compared to the same period last year?, % of respondents that mentioned regularly purchasing the items

% per row		Rural								
		N	Decreased	Stayed the same	Increased up to 15%	Increased up to 30%	Increased up to 50%	Increased up to 100%	Increased more than >100%	I don't know
Food items	Bread, pastry, macaroni, Corn, rice	**65**	0	4	42	30	17	5	0	3
	Potato	**52**	0	7	46	22	16	4	0	5
	Vegetable oil, butter, fat	**51**	2	7	26	28	26	4	0	5
	Sugar, honey, jams, ice creams, sweets	**58**	0	8	39	21	11	12	4	6
	Vegetables	**62**	0	11	23	25	16	16	7	3
	Dairy products	**58**	0	11	39	25	13	8	0	3
	Beans, lentils, peas	**46**	0	16	39	22	1	3	0	18
	Meat, fish, eggs	**49**	0	3	20	33	26	2	2	13
	Fruits	**61**	0	7	23	22	27	11	3	7
Non-food items	Hygiene NFIs	**56**	0	11	25	28	14	5	0	15
	Drinking water	**17**	0	31	39	12	3	0	0	15
	Cooking and eating utensils	**32**	0	13	16	18	8	3	3	38
	Bedding	**39**	0	11	14	19	9	6	0	41
	Clothing (including shoes)	**52**	0	7	16	26	15	6	4	26
Health care items	General medicines	**58**	2	7	29	30	14	3	2	13
	Supportive devices	**12**	0	9	16	21	22	0	0	33
Fuel	Electricity	**59**	0	0	25	25	25	9	12	4
	Gas	**54**	7	2	12	10	19	19	28	2
	Fuel for vehicles	**33**	14	12	19	23	8	12	3	9
	Firewood	**52**	0	2	5	6	33	39	9	5
	Coal	**24**	0	4	8	13	16	37	8	15

Certain food items, such as bread, pastry, macaroni, corn, rice, and potatoes are generally perceived as affordable, with 74% to 80% of respondents considering their prices reasonable. However, there are notable challenges regarding affordability for certain food items – over half of respondents find fruit (60%), meat/fish/eggs (58%) and vegetables (51%) unaffordable. Non-food items also pose affordability issues - clothing items and general medicines are perceived as not affordable by roughly 55% of respondents (both refugees and Moldovans). Most (61%) evaluated gas and half (48%)– electricity - as not affordable.

For almost all items, the interviewed refugees evaluated the products as affordable to a higher degree, compared to RM citizens. The biggest discrepancies among respondent categories in terms of items' affordability were noted:

- Vegetables – 61% of interviewed refugees and 30% of interviewed RM citizens evaluated the item as affordable
- Dairy products – assessed as affordable by 73% of refugees and 42% of RM citizens
- Vegetable oil, butter, fat - assessed as affordable by 72% of refugees and 42% of RM citizens
- Firewood – 64% of RM citizens and 15% of refugees evaluated the item as unaffordable. It is important to note that lower shares of interviewed refugees were able to evaluate the affordability of this item

Overall, respondents from the Central and Southern regions mentioned to a lower degree that the prices were affordable. In terms of differences among respondents based on regions, the biggest discrepancies were for the following items:

- Vegetables – assessed as affordable by 24% of respondents from the Central region
- Supportive devices - assessed as affordable by 3% of Southern respondents
- Drinking water - 47% of Southern respondents and 49% of those from the North evaluated the item as affordable
- Vegetable oil, butter, fat - assessed as affordable by 49% of respondents from the Southern region and 36% of Central region
- For electricity and gas, respondents from Transnistria mentioned to a higher degree the price was affordable

Respondents that live in urban areas view essential items as more affordable, compared to rural residents. The main differences in affordability were noted for:

- Vegetable oil/butter/fat are considered affordable by 70% of respondents from urban areas and 37% of those from villages
- Vegetables – assessed as affordable by 58% of urban respondents and 28% rural respondents
- For drinking water, 76% of urban respondents and 41% of those from rural areas assessed the price as affordable. Half of rural respondents were unable to evaluate the affordability of this item
- Firewood and coal were evaluated as unaffordable by most rural respondents. Lower shares of interviewed urban respondents managed to assess how affordable these fuel items were.

Figure 7.1: Q2.4. Please assess the how affordable are the items?, %

% per row		Total, N=191		
		Price is affordable	Price is not affordable	Don't know
Food items	Bread, pastry, macaroni, Corn, rice	80	19	1
	Potato	74	20	6
	Vegetable oil, butter, fat	59	35	6
	Sugar, honey, jams, ice creams, sweets	65	25	10
	Vegetables	48	51	2
	Dairy products	60	35	5
	Beans, lentils, peas	60	19	22
	Meat, fish, eggs	34	58	8
	Fruits	38	60	2
Non-food items	Hygiene NFIs	65	28	7
	Drinking water	64	7	29
	Cooking and eating utensils	27	37	36
	Bedding	29	36	35
	Clothing (including shoes)	29	55	16
Healthcare items	General medicines	37	55	8
	Supportive devices	25	23	52
Fuel	Electricity	42	48	10
	Gas	25	61	14
	Fuel for vehicles	23	31	46
	Firewood	7	36	56
	Coal	7	23	71

Figure 7.2: Q2.4. Please assess the how affordable are the items?, %

% per row		Refugee, N=108		
		Price is affordable	Price is not affordable	Don't know
Food items	Bread, pastry, macaroni, Corn, rice	92	6	2
	Potato	86	8	6
	Vegetable oil, butter, fat	72	24	4
	Sugar, honey, jams, ice creams, sweets	75	15	10
	Vegetables	61	39	0
	Dairy products	73	21	6
	Beans, lentils, peas	70	6	24
	Meat, fish, eggs	39	56	5
	Fruits	44	55	1
Non-food items	Hygiene NFIs	72	15	12
	Drinking water	76	4	20
	Cooking and eating utensils	29	36	35
	Bedding	30	33	37
	Clothing (including shoes)	27	54	19
Healthcare items	General medicines	40	55	4
	Supportive devices	27	18	56
Fuel	Electricity	48	35	17
	Gas	33	47	20
	Fuel for vehicles	20	18	62
	Firewood	6	15	80
	Coal	2	7	90

Figure 7.3: Q2.4. Please assess the how affordable are the items?, %

% per row		Citizen, N=83		
		Price is affordable	Price is not affordable	Don't know
Food items	Bread, pastry, macaroni, Corn, rice	64	36	0
	Potato	58	35	7
	Vegetable oil, butter, fat	42	49	9
	Sugar, honey, jams, ice creams, sweets	51	39	10
	Vegetables	30	66	4
	Dairy products	42	54	4
	Beans, lentils, peas	47	35	19
	Meat, fish, eggs	28	62	11
	Fruits	31	66	3
Non-food items	Hygiene NFIs	55	44	1
	Drinking water	49	10	41
	Cooking and eating utensils	25	38	37
	Bedding	27	40	33
	Clothing (including shoes)	32	56	12
Healthcare items	General medicines	33	54	13
	Supportive devices	22	30	48
Fuel	Electricity	33	65	1
	Gas	15	79	6
	Fuel for vehicles	27	47	26
	Firewood	10	64	26
	Coal	12	43	45

Figure 7.4: Q2.4. Please assess the how affordable are the items?, %

% per row		North, N=44		
		Price is affordable	Price is not affordable	Don't know
Food items	Bread, pastry, macaroni, Corn, rice	74	26	0
	Potato	66	26	9
	Vegetable oil, butter, fat	67	23	10
	Sugar, honey, jams, ice creams, sweets	76	22	2
	Vegetables	44	54	2
	Dairy products	47	48	4
	Beans, lentils, peas	58	18	25
	Meat, fish, eggs	34	60	6
	Fruits	34	66	0
Non-food items	Hygiene NFIs	70	25	5
	Drinking water	49	12	38
	Cooking and eating utensils	27	45	28
	Bedding	37	41	23
	Clothing (including shoes)	30	58	12
Healthcare items	General medicines	30	52	19
	Supportive devices	21	16	63
Fuel	Electricity	33	51	16
	Gas	20	56	24
	Fuel for vehicles	22	36	41
	Firewood	9	56	36
	Coal	16	42	42

Figure 7.5: Q2.4. Please assess the how affordable are the items?, %

% per row		Center, N=29		
		Price is affordable	Price is not affordable	Don't know
Food items	Bread, pastry, macaroni, Corn, rice	**79**	18	4
	Potato	**75**	22	4
	Vegetable oil, butter, fat	**35**	62	4
	Sugar, honey, jams, ice creams, sweets	**50**	36	15
	Vegetables	**24**	76	0
	Dairy products	**57**	43	0
	Beans, lentils, peas	**53**	36	11
	Meat, fish, eggs	**11**	82	7
	Fruits	**28**	72	0
Non-food items	Hygiene NFIs	**53**	43	4
	Drinking water	**64**	7	29
	Cooking and eating utensils	**17**	43	40
	Bedding	**17**	40	43
	Clothing (including shoes)	**17**	69	15
Health care items	General medicines	**36**	57	7
	Supportive devices	**17**	36	48
Fuel	Electricity	**28**	65	7
	Gas	**11**	78	11
	Fuel for vehicles	**18**	47	35
	Firewood	**4**	80	17
	Coal	**4**	50	47

Figure 7.6: Q2.4. Please assess the how affordable are the items?, %

% per row		Chisinau, N=55		
		Price is affordable	Price is not affordable	Don't know
Food items	Bread, pastry, macaroni, Corn, rice	**85**	14	2
	Potato	**79**	16	5
	Vegetable oil, butter, fat	**65**	32	4
	Sugar, honey, jams, ice creams, sweets	**63**	24	13
	Vegetables	**51**	45	4
	Dairy products	**67**	29	4
	Beans, lentils, peas	**61**	19	19
	Meat, fish, eggs	**43**	52	6
	Fruits	**37**	59	4
Non-food items	Hygiene NFIs	**67**	25	9
	Drinking water	**76**	8	17
	Cooking and eating utensils	**29**	31	40
	Bedding	**28**	28	43
	Clothing (including shoes)	**34**	48	18
Healthcare items	General medicines	**41**	54	5
	Supportive devices	**34**	31	35
Fuel	Electricity	**32**	55	12
	Gas	**9**	74	16
	Fuel for vehicles	**29**	19	51
	Firewood	**8**	7	85
	Coal	**6**	2	92

Figure 7.7: Q2.4. Please assess the how affordable are the items?, %

% per row		South, N=33		
		Price is affordable	Price is not affordable	Don't know
Food items	Bread, pastry, macaroni, Corn, rice	69	31	0
	Potato	61	29	10
	Vegetable oil, butter, fat	49	42	9
	Sugar, honey, jams, ice creams, sweets	55	33	12
	Vegetables	45	55	0
	Dairy products	55	41	3
	Beans, lentils, peas	58	14	28
	Meat, fish, eggs	36	49	15
	Fruits	39	57	3
Non-food items	Hygiene NFIs	55	38	7
	Drinking water	47	3	49
	Cooking and eating utensils	32	24	44
	Bedding	29	34	37
	Clothing (including shoes)	28	46	26
Healthcare items	General medicines	39	58	3
	Supportive devices	3	7	90
Fuel	Electricity	42	58	0
	Gas	16	81	3
	Fuel for vehicles	18	43	40
	Firewood	12	54	34
	Coal	2	28	70

Figure 7.8: Q2.4. Please assess the how affordable are the items?, %

% per row		Transnistria, N=30		
		Price is affordable	Price is not affordable	Don't know
Food items	Bread, pastry, macaroni, Corn, rice	93	7	0
	Potato	90	7	3
	Vegetable oil, butter, fat	69	24	7
	Sugar, honey, jams, ice creams, sweets	76	14	10
	Vegetables	72	28	0
	Dairy products	72	14	14
	Beans, lentils, peas	69	7	24
	Meat, fish, eggs	38	55	7
	Fruits	55	45	0
Non-food items	Hygiene NFIs	76	10	14
	Drinking water	83	0	17
	Cooking and eating utensils	28	45	28
	Bedding	28	45	28
	Clothing (including shoes)	31	59	10
Healthcare items	General medicines	41	55	3
	Supportive devices	45	24	31
Fuel	Electricity	86	3	10
	Gas	86	3	10
	Fuel for vehicles	24	14	62
	Firewood	3	0	97
	Coal	3	0	97

Figure 7.9: Q2.4. Please assess the how affordable are the items?, %

% per row		Urban, N=126		
		Price is affordable	Price is not affordable	Don't know
Food items	Bread, pastry, macaroni, Corn, rice	**86**	12	2
	Potato	**81**	15	4
	Vegetable oil, butter, fat	**70**	26	5
	Sugar, honey, jams, ice creams, sweets	**70**	18	12
	Vegetables	**58**	41	2
	Dairy products	**67**	27	6
	Beans, lentils, peas	**66**	15	19
	Meat, fish, eggs	**41**	53	6
	Fruits	**42**	56	2
Non-food items	Hygiene NFIs	**68**	22	10
	Drinking water	**76**	7	18
	Cooking and eating utensils	**34**	37	29
	Bedding	**34**	32	35
	Clothing (including shoes)	**34**	49	17
Healthcare items	General medicines	**41**	54	5
	Supportive devices	**33**	19	48
Fuel	Electricity	**48**	39	13
	Gas	**30**	54	15
	Fuel for vehicles	**27**	17	56
	Firewood	**9**	12	79
	Coal	**9**	6	85

Figure 7.10: Q2.4. Please assess the how affordable are the items?, %

% per row		Rural, N=65		
		Price is affordable	Price is not affordable	Don't know
Food items	Bread, pastry, macaroni, Corn, rice	**68**	32	0
	Potato	**61**	29	11
	Vegetable oil, butter, fat	**37**	53	10
	Sugar, honey, jams, ice creams, sweets	**55**	39	6
	Vegetables	**28**	71	1
	Dairy products	**45**	52	3
	Beans, lentils, peas	**47**	26	26
	Meat, fish, eggs	**20**	68	12
	Fruits	**30**	68	2
Non-food items	Hygiene NFIs	**58**	38	3
	Drinking water	**41**	7	52
	Cooking and eating utensils	**14**	37	49
	Bedding	**18**	46	36
	Clothing (including shoes)	**20**	65	15
Healthcare items	General medicines	**30**	56	14
	Supportive devices	**10**	30	61
Fuel	Electricity	**29**	67	4
	Gas	**15**	73	12
	Fuel for vehicles	**15**	58	27
	Firewood	**4**	83	13
	Coal	**2**	55	43

Overall, the median prices for most items are relatively consistent across the total sample, with both refugees and citizens indicating mostly similar prices for the essential items. However, there are differences observed prices reported by refugees and citizens for two products – beef and cheese. For instance, the median price indicated for beef is higher among refugees (140 MDL) compared to citizens (114 MDL). Regarding dairy products, there are notable differences in the median prices of cheese, refugees naming a higher price (180 MDL) compared to citizens (145 MDL).

When analysing the data obtained in different regions, usually the price variations for most food items is within 10-20 MDL. The exception is cheese, with the median reported price among Transnistrian respondents (196 MDL) and Northern respondents (180 MDL) being higher than in other regions. On the other hand, respondents living in urban and rural areas reported similar prices for essential food items, with deviations within 10 MDL.

Table 3.1: Q2.5. What is the current price for the following items? Please evaluate the cheapest available products of this type. Median (Food items)

Products	Median (MDL)		
	Total, N=191	Refugee, N=108	Citizen, N=83
Food items			
Bread, 1 unit	7	7	7
Macaroni, 1 kg	23	25	23
Corn, 1 kg	15	15	15
Rice, 1 kg	26	25	26
Buckwheat, 1 kg	30	32	28
Wheat flour, 1 kg	16	15	18
Beans, 1 kg	30	30	30
Peas, 1 kg	17	18	16
Cucumbers, 1 kg	40	40	40
Cabbage, 1 kg	20	20	20
Carrots, 1 kg	18	20	16
Tomatoes, 1 kg	40	45	40
Onions, 1 kg	22	23	21
Apples, 1 kg	13	12.6	14
Bananas, 1 kg	36	36	38
Oranges, 1 kg	35	35	35
Beef, 1 kg	130	140	114
Chicken, 1 kg	80	80	85
Fish, 1 kg	75	78	70
Eggs, 10 units	27	28	25
Milk, 1 l	18	20	18
Cheese, 1 kg	158	180	145
Sunflower oil, 1 l	35	35	35
Butter, 200 g	40	40	40
Sugar, 1 kg	24	24	24

Table 3.2: Q2.5. What is the current price for the following items? Please evaluate the cheapest available products of this type. Median (Food items)

Products	Median (MDL)					
	Total, N=191	North, N=44	Center, N=29	Chisinau, N=55	South, N=33	Transnistria, N=30
Food items						
Bread, 1 unit	7	7	7	7	8	6
Macaroni, 1 kg	23	22	23	20	25	28
Corn, 1 kg	15	16	15	15	15	22
Rice, 1 kg	26	25	22	25	27	28
Buckwheat, 1 kg	30	30	25	30	30	42
Wheat flour, 1 kg	16	20	16	15	13	27
Beans, 1 kg	30	30	30	30	30	42
Peas, 1 kg	17	20	16	15	18	22
Cucumbers, 1 kg	40	38	40	40	45	43
Cabbage, 1 kg	20	22	18	20	20	28
Carrots, 1 kg	18	18	15	20	16	21
Tomatoes, 1 kg	40	36	40	40	45	49
Onions, 1 kg	22	20	21	24	25	25
Apples, 1 kg	13	15	12	12	13	14
Bananas, 1 kg	36	35	36	35	40	42
Oranges, 1 kg	35	35	35	32	37	35
Beef, 1 kg	130	120	120	130	120	140
Chicken, 1 kg	80	90	80	80	80	84
Fish, 1 kg	75	70	72	80	76	70
Eggs, 10 units	27	25	30	26	25	30
Milk, 1 l	18	20	16	17	20	22
Cheese, 1 kg	158	180	120	150	150	196
Sunflower oil, 1 l	35	34	38	35	35	54
Butter, 200 g	40	38	42	40	40	48
Sugar, 1 kg	24	24	23	24	25	27

Table 3.3: Q2.5. What is the current price for the following items? Please evaluate the cheapest available products of this type. Median (Food items)

Products	Median (MDL)		
	Total, N=191	Urban, N=126	Rural, N=65
Food items			
Bread, 1 unit	7	7	7
Macaroni, 1 kg	23	23	25
Corn, 1 kg	15	15	15
Rice, 1 kg	26	26	26
Buckwheat, 1 kg	30	30	30
Wheat flour, 1 kg	16	17	15
Beans, 1 kg	30	30	30
Peas, 1 kg	17	17	18
Cucumbers, 1 kg	40	40	40
Cabbage, 1 kg	20	20	20
Carrots, 1 kg	18	20	18
Tomatoes, 1 kg	40	42	40
Onions, 1 kg	22	22	21
Apples, 1 kg	13	12	15
Bananas, 1 kg	36	36	36
Oranges, 1 kg	35	35	35
Beef, 1 kg	130	130	130
Chicken, 1 kg	80	80	80
Fish, 1 kg	75	75	70
Eggs, 10 units	27	28	25
Milk, 1 l	18	20	18
Cheese, 1 kg	158	160	150
Sunflower oil, 1 l	35	35	36
Butter, 200 g	40	40	40
Sugar, 1 kg	24	24	24

For hygiene items, interviewed RM citizens and refugees mentioned similar prices, with a range of up to 14 MDL. On the other hand, Moldovan citizens that participated in the survey indicated higher minimum prices for essential clothing, some cooking utensils, and firewood, compared to refugees, with the highest differences noted for:

- Winter coat – citizens indicated a minimum price of 1700 MDL and refugees – 1400 MDL
- Boots - citizens specified a minimum price of 1000 MDL and refugees – 800 MDL
- Firewood - citizens indicated a price of 1400 MDL and refugees – 1200 MDL
- Jacket, shirt, sweater, cooking pot – discrepancies of 100 MDL between prices indicated by citizens and refugees
- At the same time, refugees mentioned higher median prices for sneakers (550 MDL, compared to 500 MDL by citizens) and eyeglasses (500 MDL, vs a median of 450 MDL by RM citizens).

Among respondents from different regions, it appears that most clothing and bedding, eyeglasses and firewood are the items that have the biggest discrepancies in terms of reported minimum price:

- Eyeglasses – the lowest price (280 MDL) reported by respondents from the North
- Firewood - the highest price was mentioned by respondents from Transnistria (1680 MDL)
- The lowest price for boots was indicated by respondents from the South – 800 MDL
- Lowest priced for jackets – reported by Chisinau respondents (600 MDL)
- Winter coats, sneakers, shirts, blankets, pillows, cooking pots - discrepancies of 100 MDL across the regions

Similar to the findings for different respondent categories and regions, there are some differences reported by urban and rural respondents in terms of prices for some clothes, bedding, cooking items, coal and firewood. The biggest differences among rural and urban respondents are noted for:

- Sneakers – urban respondents mentioned a price of 700 MDL compared to the price of 450 MDL reported by rural respondents
- Jackets – higher price reported by urban respondents (800 MDL) than rural respondents (650 MDL)
- Blankets – 400 MDL price reported by those from towns vs 300 MDL – by those from villages
- Eyeglasses, firewood – prices reported by rural respondents were higher by 100 MDL compared to the prices reported by respondents living in urban areas.
- On the other hand, prices for hygiene items appear to be similar across urban and rural areas (a range of up to 5 MDL), according to the respondents.

Table 4.1: Q2.5. What is the current price for the following items? Please evaluate the cheapest available products of this type. Median (Non-food items and fuel)

Products	Median (MDL)		
	Total, N=191	Refugee, N=108	Citizen, N=83
Non-food items			
Drinking water, 1.5 l	12	12	13
Toilet paper, 1 unit	7	7	7
Toothbrush, 1 unit	25	24	30
Toothpaste, 1 unit	42	36	50
Laundry Soap, 1 kg price	50	50	50
Liquid dish detergent, 500 ml	30	30	32
Sanitary napkins, 10 units	32	30	35
Soap, 500 ml price	40	42	38
Jeans, 1 unit	462	450	500
Shirt, 1 unit	300	280	380
Sweater, 1 unit	380	300	400
Socks, 1 pair	20	20	20
Underwear, 1 unit	55	50	60
Jacket, 1 unit	700	700	800

Winter coat, 1 unit	1500	1400	1700
Boots, 1 pair	1000	800	1000
Sneakers, 1 pair	500	550	500
Bedlinens, 1 set	500	500	500
Pillow, 1 unit	200	200	200
Blanket, 1 unit	400	400	380
Cup, 1 unit	25	25	25
Plate, 1 unit	28	28	25
Spoon, 1 unit	16	15	18
Cooking knife, 1 unit	40	50	35
Frying pan, 1 unit	300	300	350
Pot, 1 unit	350	300	400
Antiinflamatory medicine, 1 pack	80	80	80
Alcohol solution, 500 ml	30	30	30
Eyeglasses, 1 unit	500	500	450
Fuel			
Gasoline, 1 l	25	25	24
Diesel, 1 l	20	25	20
Gas, 1 m3	28	29	28
Coal, 1 kg	20	120[9]	12
Firewood, 1 m3	1400	1200	1400
Electricity, 1 kW	3	3	3

Table 4.2: Q2.5. What is the current price for the following items? Please evaluate the cheapest available products of this type. Median (Non-food items and fuel)

Products	Median (MDL)					
	Total, N=191	North, N=44	Center, N=29	Chisinau, N=55	South, N=33	Transnistria, N=30
Non-food items						
Drinking water, 1.5 l	12	13	10	12	13	11
Toilet paper, 1 unit	7	6	9	8	6	7
Toothbrush, 1 unit	25	24	30	25	23	25
Toothpaste, 1 unit	42	50	45	40	40	35
Laundry Soap, 1 kg price	50	67	53	40	36	30
Liquid dish detergent, 500 ml	30	28	34	32	27	28
Sanitary napkins, 10 units	32	32	40	30	30	32
Soap, 500 ml price	40	38	50	40	35	28
Jeans, 1 unit	462	450	450	500	500	420
Shirt, 1 unit	300	300	400	350	300	280
Sweater, 1 unit	380	400	370	400	350	350
Socks, 1 pair	20	20	20	20	20	21
Underwear, 1 unit	55	60	60	50	45	56
Jacket, 1 unit	700	800	700	600	800	700
Winter coat, 1 unit	1500	1500	1500	1500	1500	1400
Boots, 1 pair	1000	900	1200	1000	800	1120
Sneakers, 1 pair	500	500	600	600	500	560
Bedlinens, 1 set	500	500	500	500	500	560
Pillow, 1 unit	200	250	175	150	140	168
Blanket, 1 unit	400	400	300	400	300	392
Cup, 1 unit	25	22	30	25	20	28
Plate, 1 unit	28	22	30	30	25	28
Spoon, 1 unit	16	20	20	15	18	14
Cooking knife, 1 unit	40	36	55	45	50	28
Frying pan, 1 unit	300	350	350	300	280	280
Pot, 1 unit	350	300	400	350	300	406
Antiinflamatory medicine, 1 pack	80	95	60	100	80	70
Alcohol solution, 500 ml	30	50	30	30	35	70
Eyeglasses, 1 unit	500	280	1000	450	500	700

[9] Almost all of refugees did not know the price, with one respondent indicating the presented amount.

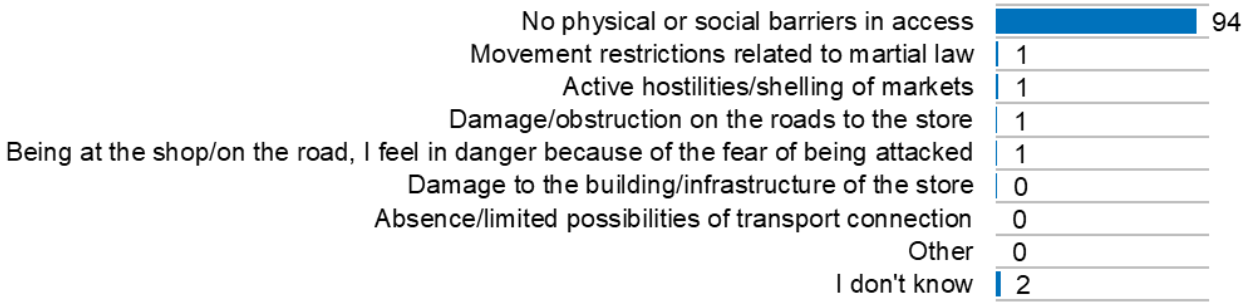
Fuel						
Gasoline, 1 l	25	24	24	25	25	31
Diesel, 1 l	20	20	20	19	20	29
Gas, 1 m3	28	28	28	28	29	1
Coal, 1 kg	20	15	12	10	100	0
Firewood, 1 m3	1400	1400	1400	1300	1300	1680
Electricity, 1 kW	3	3	3	3	4	0

Table 4.3: Q2.5. What is the current price for the following items? Please evaluate the cheapest available products of this type. Median (Non-food items and fuel)

Products	Median (MDL)		
	Total, N=191	Urban, N=126	Rural, N=65
Non-food items			
Drinking water, 1.5 l	12	12	11
Toilet paper, 1 unit	7	7	7
Toothbrush, 1 unit	25	26	24
Toothpaste, 1 unit	42	40	45
Laundry Soap, 1 kg price	50	50	50
Liquid dish detergent, 500 ml	30	32	28
Sanitary napkins, 10 units	32	32	35
Soap, 500 ml price	40	40	38
Jeans, 1 unit	462	450	500
Shirt, 1 unit	300	300	350
Sweater, 1 unit	380	400	380
Socks, 1 pair	20	20	20
Underwear, 1 unit	55	50	60
Jacket, 1 unit	700	800	650
Winter coat, 1 unit	1500	1500	1500
Boots, 1 pair	1000	1000	1000
Sneakers, 1 pair	500	700	450
Bedlinens, 1 set	500	500	500
Pillow, 1 unit	200	200	150
Blanket, 1 unit	400	400	300
Cup, 1 unit	25	25	25
Plate, 1 unit	28	28	25
Spoon, 1 unit	16	15	17
Cooking knife, 1 unit	40	50	30
Frying pan, 1 unit	300	300	350
Pot, 1 unit	350	350	300
Antiinflamatory medicine, 1 pack	80	98	80
Alcohol solution, 500 ml	30	30	50
Eyeglasses, 1 unit	500	400	500
Fuel			
Gasoline, 1 l	25	25	24
Diesel, 1 l	20	20	20
Gas, 1 m3	28	28	29
Coal, 1 kg	20	100	15
Firewood, 1 m3	1400	1300	1400
Electricity, 1 kW	3	3	3

Respondents were asked whether their household faced any of the presented barriers when accessing marketplaces in the last 30 days. Overall, no physical or social barriers in accessing marketplaces were registered among respondents (94%).

Figure 8: Q2.6. In the last 30 days, did households in this region face any of the following barriers to consistently accessing marketplaces?, N=191, %



1.3. Accessibility

The respondents that are included in the sample were distributed proportionally to the regional distribution of the population. The rayons and settlements in each region were selected randomly.

When asked to evaluate accessibility, prices and diversity of food and non-food products in marketplaces, respondents were asked to think about the nearest marketplace where they usually shop for these items. For most respondents (74%), the nearest market where they normally buy food items is located less than 1 km away, with the average registered distance being 0.8 km. The distances mentioned by refugees and citizens are similar.

Respondents from the Northern regions reported slightly bigger distances to the market where they normally shop for food items – 2.3 km. Moreover, respondents from rural areas on average, travel slightly further to reach their usual marketplace for purchasing food – average distance of 1.4 km compared to 0.5 km indicated by urban residents.

Figure 9.1: Q3.1. How far away is the nearest market where you normally buy food items is located?, %

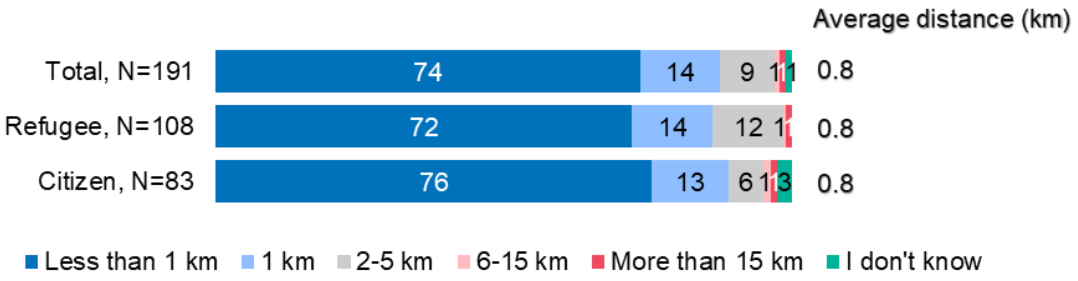


Figure 9.2: Q3.1. How far away is the nearest market where you normally buy food items is located?, %

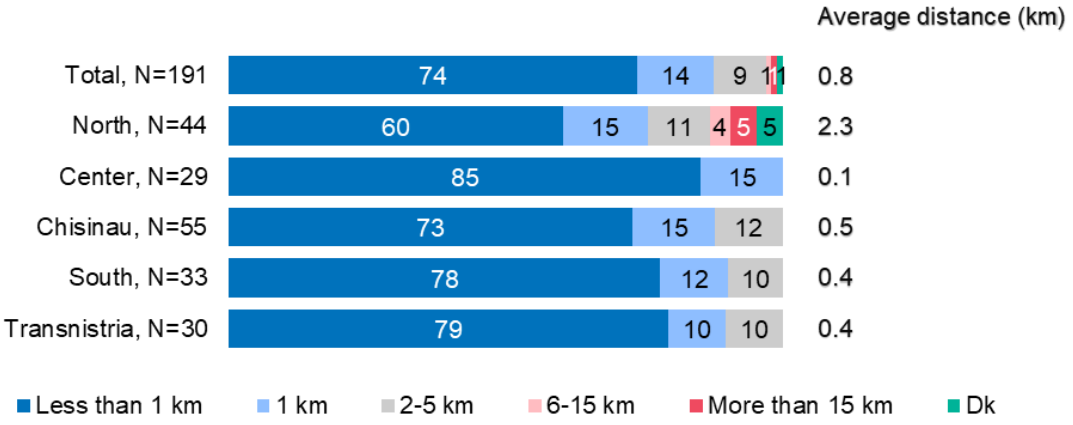


Figure 9.3: Q3.1. How far away is the nearest market where you normally buy food items is located?, %

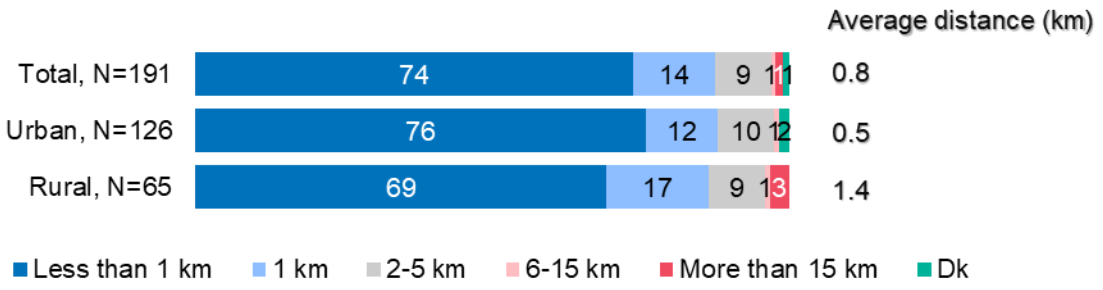
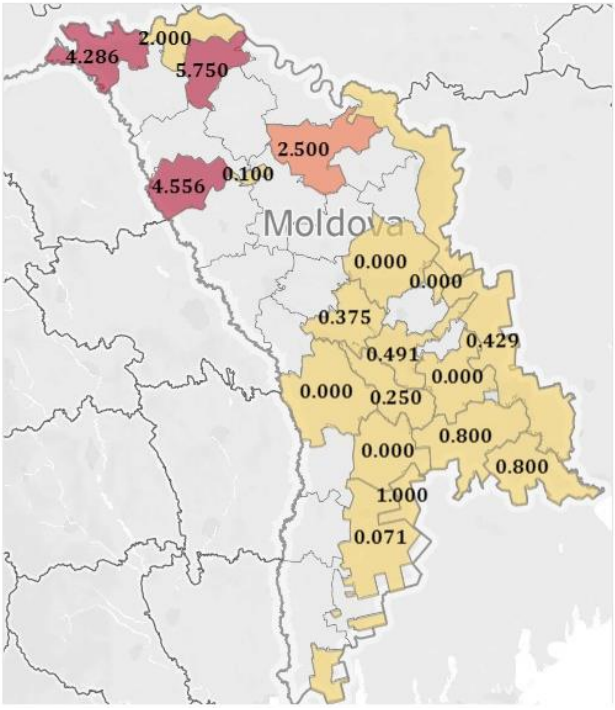


Figure 9.4: Q3.1. How far away is the nearest market where you normally buy food items is located?, average (km)



The majority (61%) consider the price level for food items at the nearest market where they usually purchase food to be average and 33% - that the prices are high. Moldovans (51%) to a larger degree perceive the food prices at their usual marketplace as high, compared to 19% of refugees who specify the same opinion.

In terms of geographical differences, half of interviewees from the Central region think that the food prices in their usual market are high (50%). On the other hand, those from Chisinau (72%) and Transnistria (69%) see the food prices as average. Respondents from rural areas indicate to a larger degree that the prices for food items at their usual market are very high (52%, +29 percentage points more compared to urban). Moreover, respondents that reported currently facing a lack of money to cover essential needs indicated to a larger degree that the prices for food items were high at their usual market.

Figure 10.1: Q3.2. Please assess the level of prices for food items in this market, %

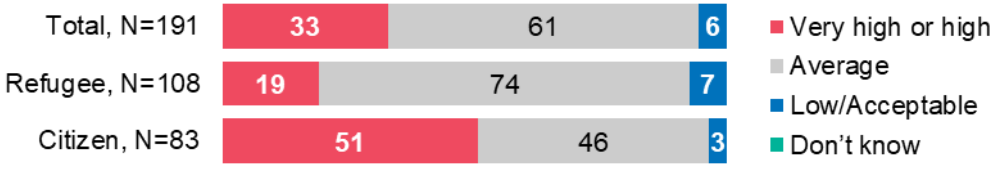


Figure 10.2: Q3.2. Please assess the level of prices for food items in this market, %

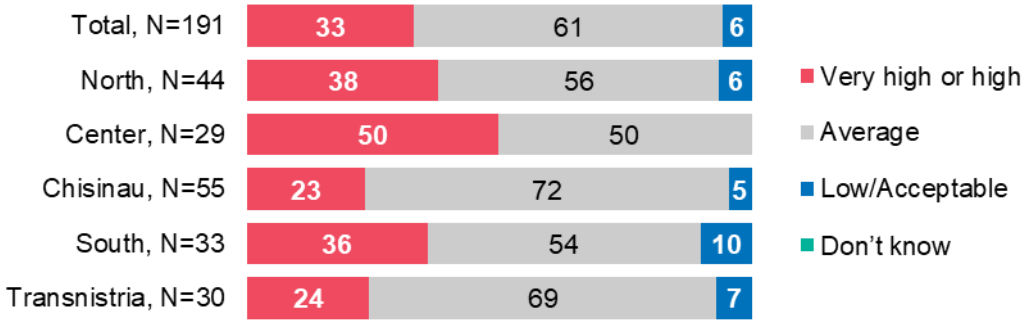


Figure 10.3: Q3.2. Please assess the level of prices for food items in this market, %

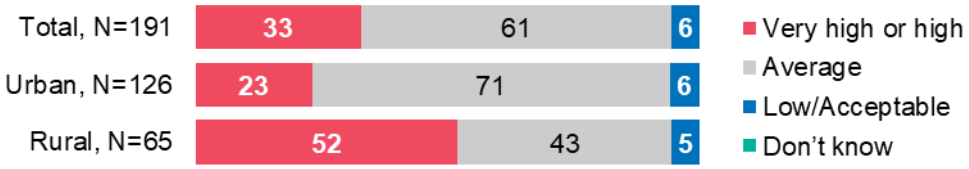
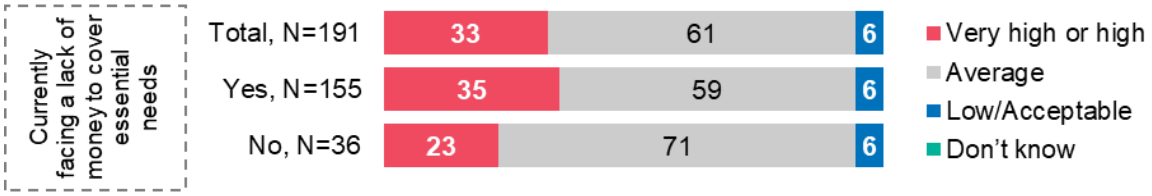


Figure 10.4: Q3.2. Please assess the level of prices for food items in this market, % disaggregated by whether the household reporting currently facing the issue of a lack of money to cover essential needs



Most respondents (66%) believe that the level of assortment of food at the nearest market where they typically buy food items is sufficient, while 31% assess it as average. This opinion is similar among interviewees from different categories (refugees and RM citizens) and areas (urban, rural). In terms of regional differences, respondents from the South (73%), Transnistria (72%) and North (70%) indicate to a larger degree that the food assortment at their usual market is good.

Figure 11.1: Q3.3. Please assess the level of assortment/diversity of food items in this market, %

Figure 11.2: Q3.3. Please assess the level of assortment/diversity of food items in this market, %

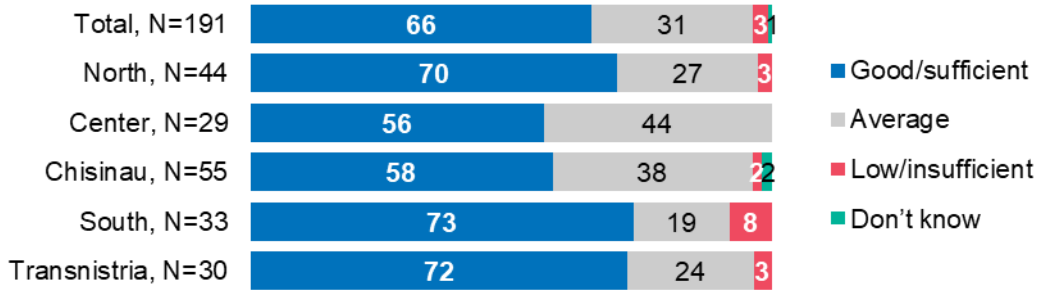


Figure 11.3: Q3.3. Please assess the level of assortment/diversity of food items in this market, %

It appears that the markets where respondents usually buy non-food items are located farther than the ones where they buy food items. For most respondents (56%), the nearest market where they normally buy non-food items is located less than 1 km away, with an average distance of 4.0 km. On average, Moldovan respondents reported a slightly bigger distance (4.8 km) to the nearest market where they typically purchase non-food items, compared to refugees (3.4 km).

Respondents from the Central (6.9 km) and Northern (5.3 km) regions reported bigger distances to their normal marketplace for non-food items. Similar to the findings regarding the distance to the closest food marketplace, the rural respondents' nearest market for non-food items is located further away (7.8 km), compared to urban respondents' usual market (2.0 km).

Figure 12.1: Q3.4. How far away is the nearest market where you normally buy non-food items is located?, %

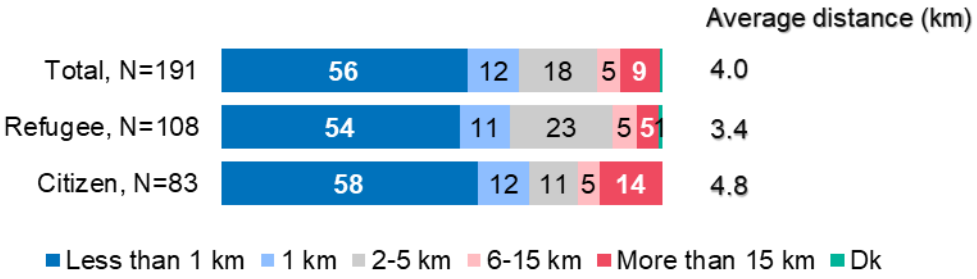


Figure 12.2: Q3.4. How far away is the nearest market where you normally buy non-food items is located?, %

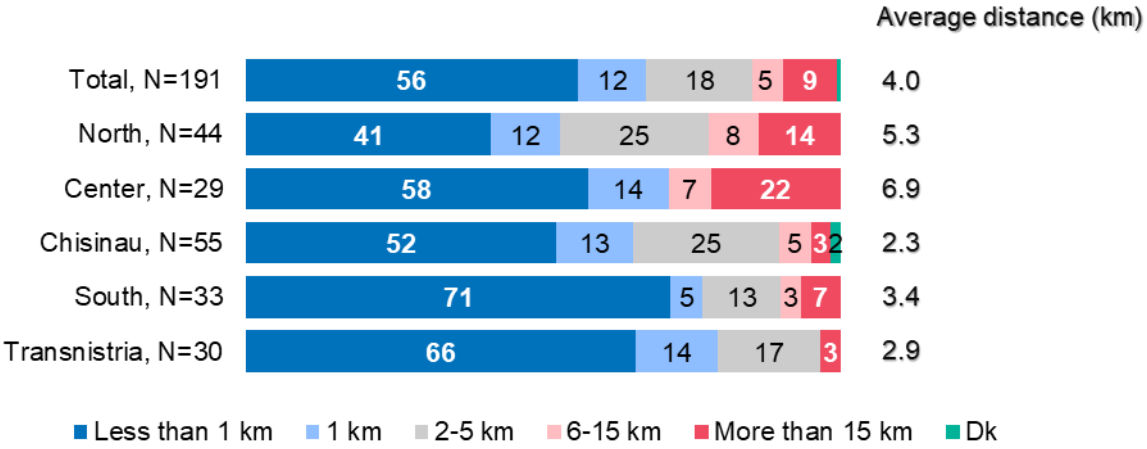


Figure 12.3: Q3.4. How far away is the nearest market where you normally buy non-food items is located?, %

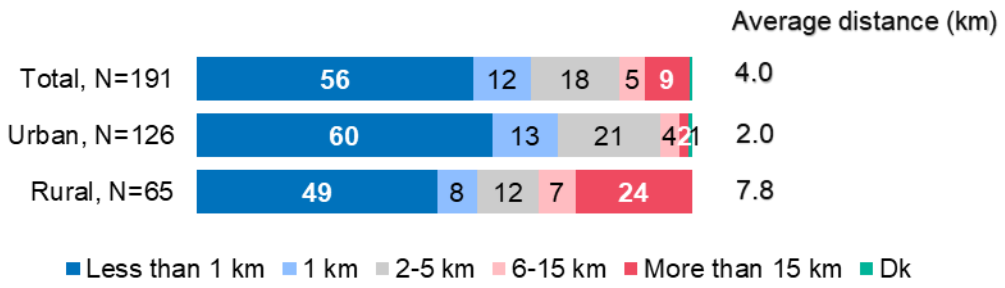
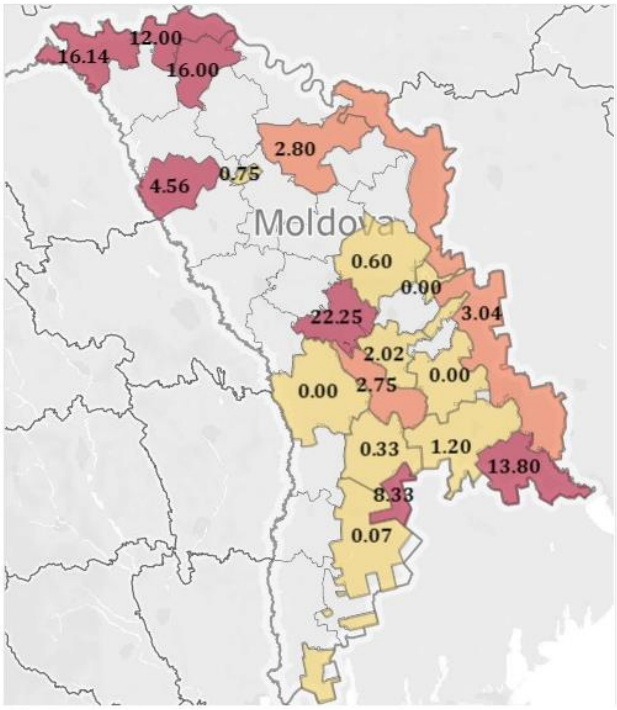


Figure 12.4: Q3.4. How far away is the nearest market where you normally buy non-food items is located?, average (km)



Half of respondents (51%) consider the level of prices for non-food items at the nearest usual market to be average, while 40% say the prices are high. Similar to the findings for the food items, RM citizens believe the prices for non-food items at their usual marketplace are high (55%), with 29% of refugees mentioning the same opinion.

Respondents from the Central region indicated to a larger degree that the prices for non-food items at their usual market are high (67%). Most of Chisinau (62%) and North (60%) interviewees mention that the non-food items at their usual marketplace are average. Similar to the opinions expressed about food items, rural respondents report to a larger degree that the prices for non-food items are very high (62%).

Figure 13.1: Q3.5. Please assess the level of prices for non-food items in this market, %

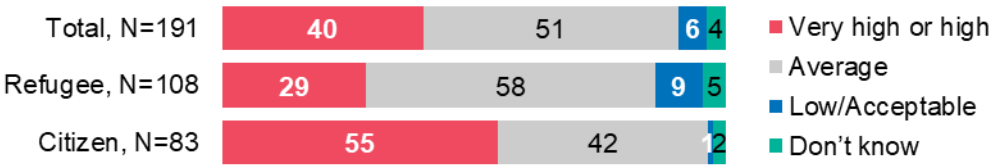


Figure 13.2: Q3.5. Please assess the level of prices for non-food items in this market, %

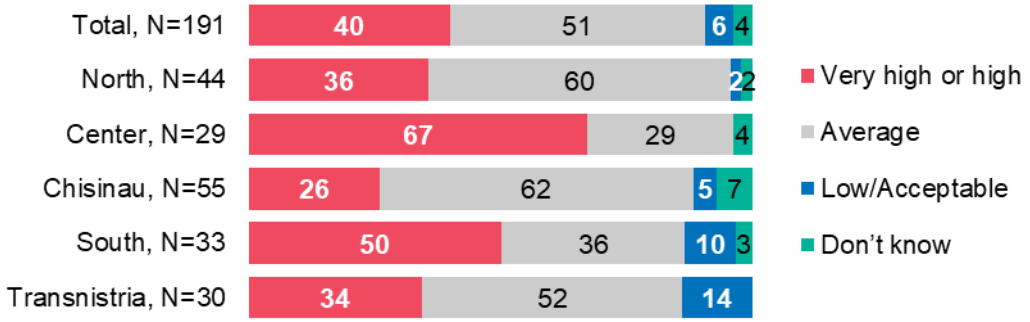
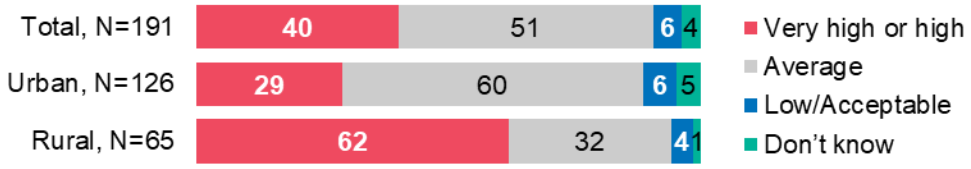


Figure 13.3: Q3.5. Please assess the level of prices for non-food items in this market, %



Most respondents (59%) believe that the level of assortment of non-food items at the nearest market where they typically buy non-food items is good, while 32% - assess it as average. The opinion that the diversity of non-food items at their usual market is average was mentioned to a slightly larger degree by citizens (38%, +10 p.p. compared to refugees).

Respondents from Transnistria indicated to a larger degree that their usual marketplace had a sufficient assortment of non-food items (72%). Roughly half of interviewees from the Central region (49%) assessed the non-food items assortment at their usual market as average. 67% of rural respondents and 55% of those from urban areas specified that the diversity of non-food items at their market was sufficient.

Figure 14.1: Q3.6. Please assess the level of assortment/diversity of non-food items in this market, %

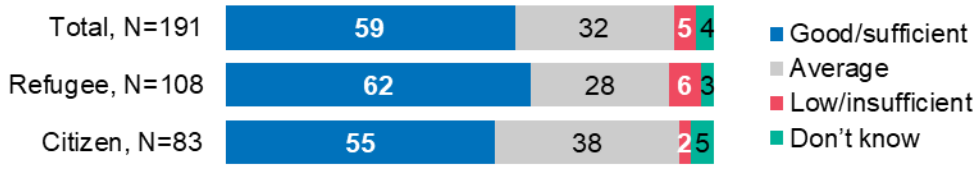


Figure 14.2: Q3.6. Please assess the level of assortment/diversity of non-food items in this market, %

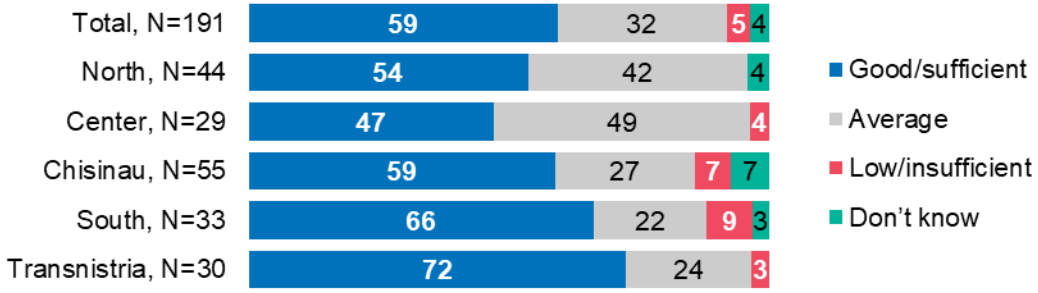
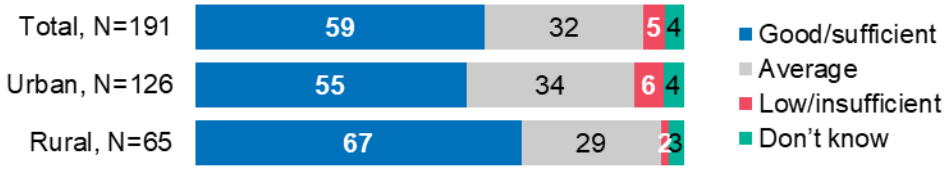


Figure 14.3: Q3.6. Please assess the level of assortment/diversity of non-food items in this market, %



Over the last 3 months, most respondents (80%) mention they did not have any situations when they were unable to access any food items that are typically part of their diet. At the same time, Moldovan respondents seem to experience more shortages of food items that are usually part of their diet in the past 3 months (28%), compared to refugees facing the same problems (13%).

In terms of regional differences, respondents from the Central region (29%) and Chisinau (25%) had a slightly more reduced access to the food from their usual diet in the past 3 months. Of respondents that reported having reduced access to the food from their usual diet in the past 3 months, 45% are aged 18-35.

Figure 15.1: Q3.7. In the past 3 months, has there been a time when you or members your household could not access any food item that are usually part of your diet by this time of the year?, %

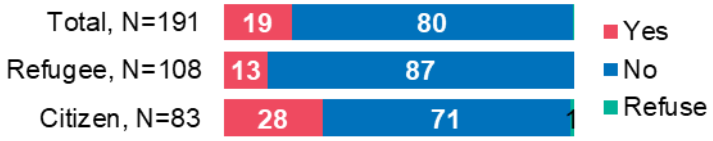


Figure 15.2: Q3.7. In the past 3 months, has there been a time when you or members your household could not access any food item that are usually part of your diet by this time of the year?, %

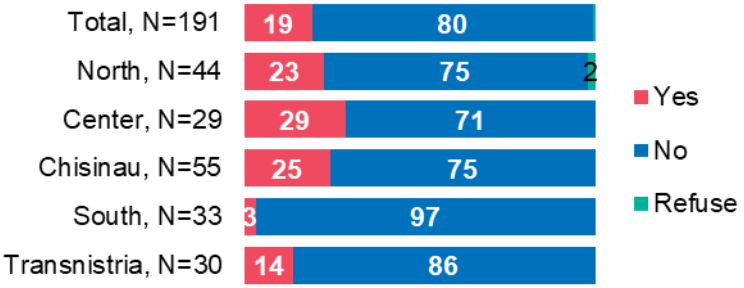


Figure 15.3: Q3.7. In the past 3 months, has there been a time when you or members your household could not access any food item that are usually part of your diet by this time of the year?, %

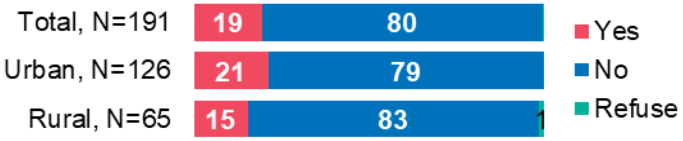
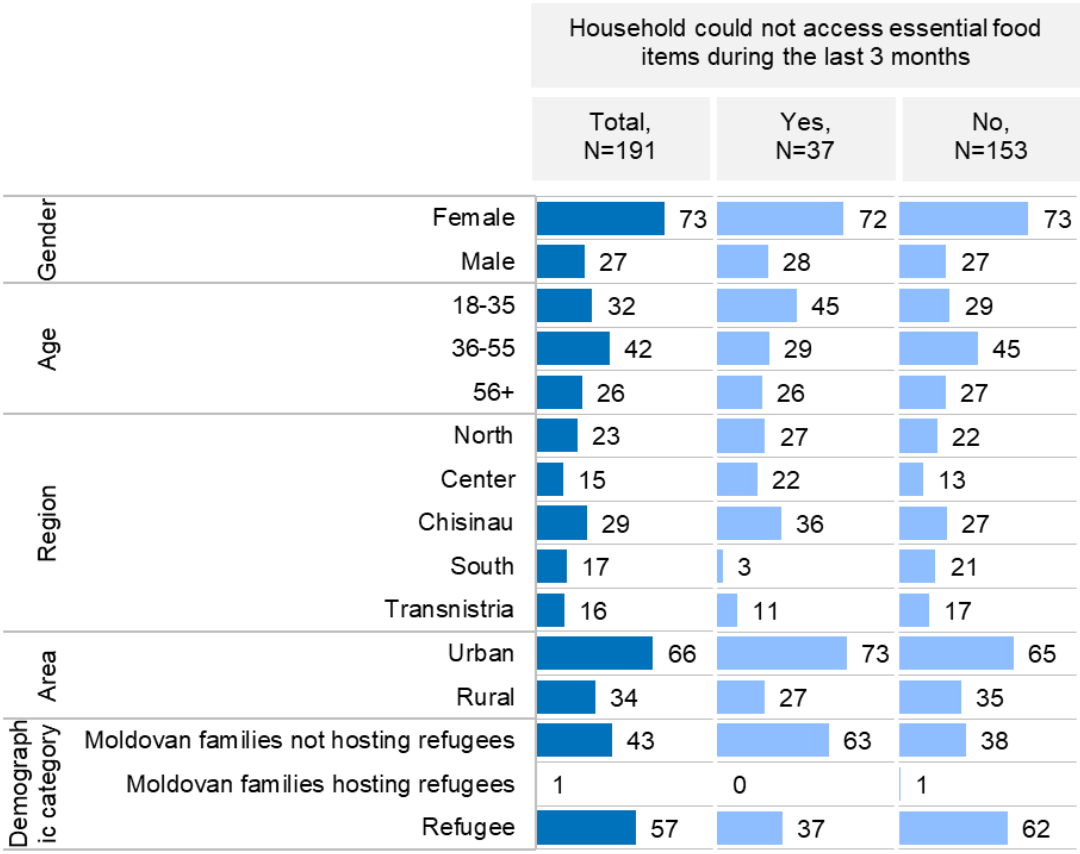
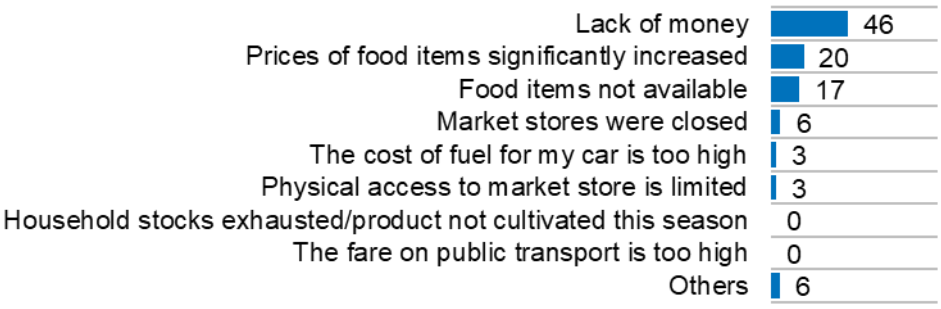


Figure 15.4: Q3.7. Profile of respondents based on instances of household's reduced access to essential food items in the past 3 months, %



Respondents who encountered in the past three months instances when they had not been able to access food items from their usual diet where asked the main reason for this shortage. The top three reasons were the lack of money (46%), food prices increasing (20%), and the unavailability of certain food items (17%).

Figure 16: Q3.8. If yes, what was the main reason?, N=37, %



Most respondents (83%) did not encounter any instances where they were unable to access essential non-food items in the past 3 months. Refugees mentioned to a higher degree not encountering essential non-food items shortages – 88% - compared to 76% of RM citizens.

To a larger degree, respondents from the Southern and Transnistrian regions (93%) did not report having instances where they were unable to access essential non-food items over the last 3 months. When taking about the respondent profile, 43% of those that said they were unable to access essential non-food items in the last 3 months are 18-35 years old.

Figure 17.1: Q3.9. In the past 3 months, has there been a time when you or members your household could not access essential non-food items that you are usually buying during this time of the year?, %

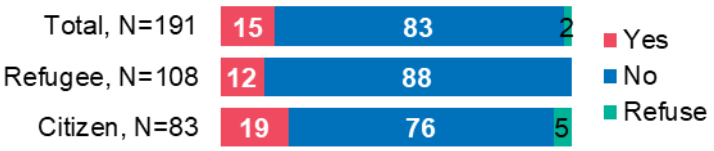


Figure 17.2: Q3.9. In the past 3 months, has there been a time when you or members your household could not access essential non-food items that you are usually buying during this time of the year?, %

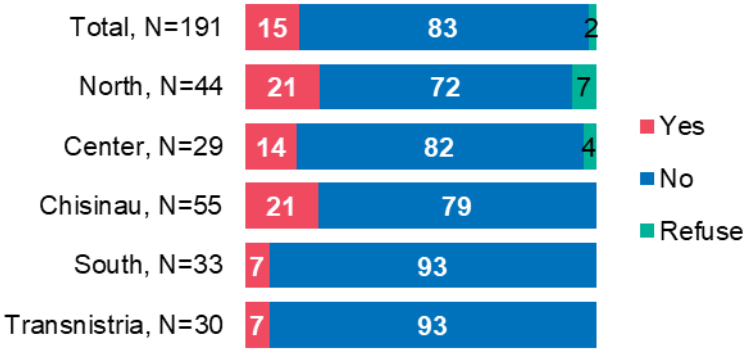


Figure 17.3: Q3.9. In the past 3 months, has there been a time when you or members your household could not access essential non-food items that you are usually buying during this time of the year?, %

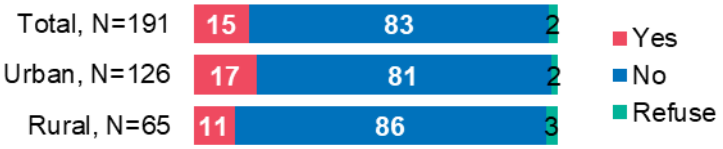
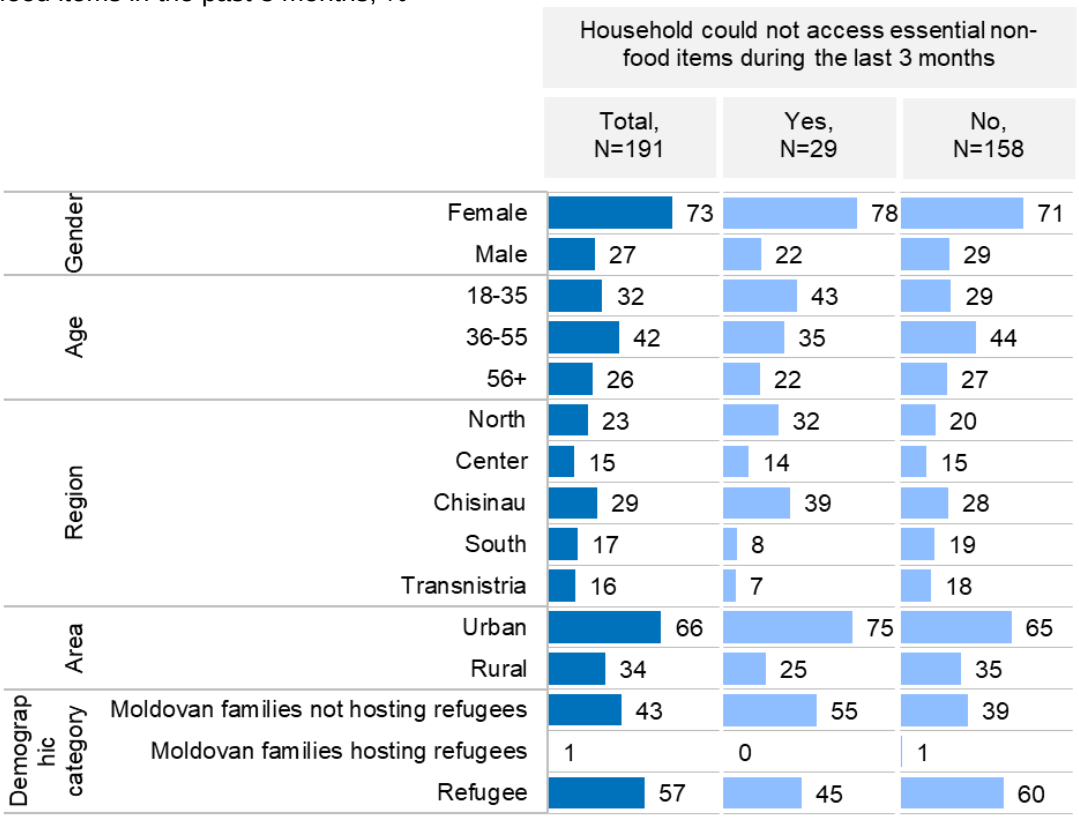
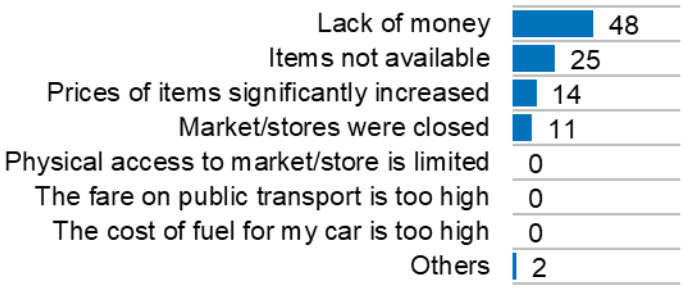


Figure 17.4: Profile of respondents based on instances of household's reduced access to essential non-food items in the past 3 months, %



Similar to the findings for essential food items, the top three reasons cited for encountering instances where they could not access essential non-food items were the lack of money (48%), unavailability of items (25%), and the increased prices for non-food items (14%).

Figure 18: Q3.10. If yes, what was the main reason?, N=29, %



1.4. Difficulties and expectations (main problems faced)

Respondents were asked to mention what problems they had faced with accessing essential food and non-food items this time last year and presently. The top four difficulties most frequently encountered by respondents in accessing essential food and non-food items were lack of money (75%), high prices for non-food items (67%), high prices for food items (67%), and the high cost of gas/fuel/electricity (65%).

RM citizens indicated to a larger degree encountering problems with accessing essential products during the same period last year. For Moldovan citizens, the top problem they encountered this time last year was the high cost for gas/ fuel (81%).

In terms of differences across regions, the main problem related to accessing essential items during the same period last year was high cost of gas/fuel/electricity for 92% of Central region respondents, 79% of Chisinau respondents and 77% of those from the North. High costs of gas/fuel/electricity, food and non-food items were mentioned to a lesser degree by Transnistrian respondents when taking about facing problems this time last year.

Rural respondents reported more often that they faced the following problems last year – high prices for non-food items (77%), gas/fuel/electricity (76%) and food (74%). On the other hand, urban respondents faced lack of household food stocks to a larger degree during this time last year.

Figure 19.1: Q4.1. What are the main problems with accessing essential food and non-food items you have faced during the same period of the year?, %

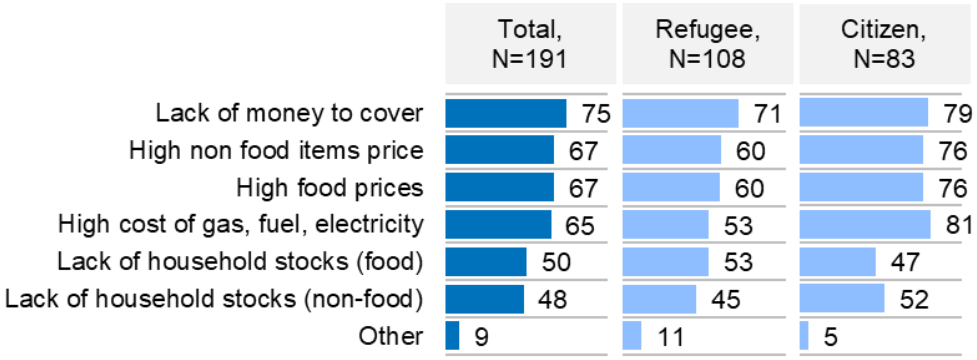


Figure 19.2: Q4.1. What are the main problems with accessing essential food and non-food items you have faced during the same period of the year?, %

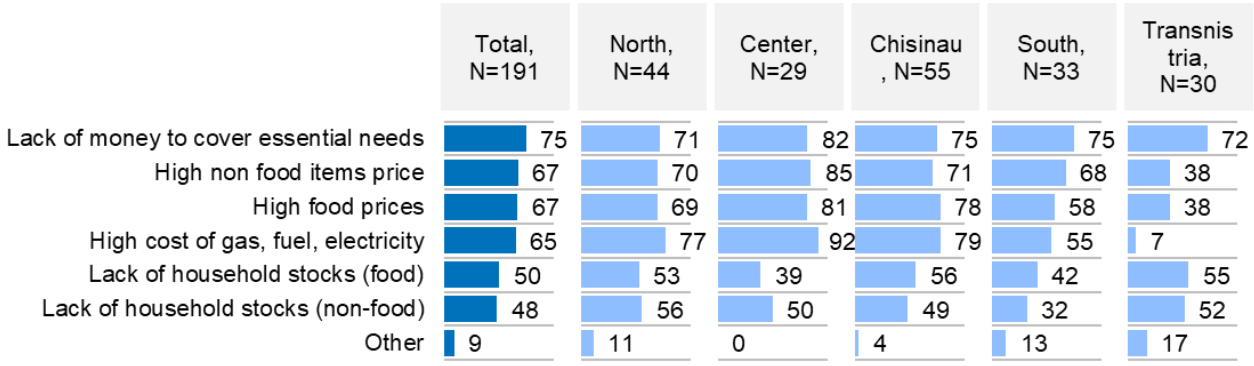
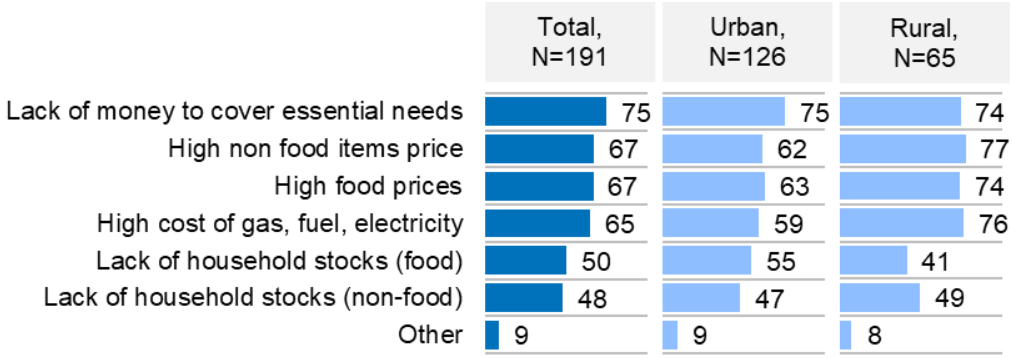


Figure 19.3: Q4.1. What are the main problems with accessing essential food and non-food items you have faced during the same period of the year?, %



It appears that the problems respondents are currently facing in accessing essential food and non-food items have increased compared to last year. The ranking of the current problems is similar to the one of problems faced this time last year: lack of money, high prices for non-food items (81%), high prices for food items (80%), and the high cost of gas, fuel, electricity (77%).

Overall, RM respondents indicated to a larger degree experiencing the presented problems this year, compared to refugees. For Moldovan citizens, the top problem they encountered this year continues to be the high cost for gas/fuel (95%).

Regional differences for the problems encountered with accessing essential products at this time are similar to the differences attested for the same period last year. High cost of gas/fuel/electricity is the main problem related to currently accessing essential items for 97% of Southern, 95% of Chisinau, 92% of Central region respondents. When talking about main current problems in accessing essential items, cost of gas/fuel/electricity, high food and non-food prices were specified to a lesser degree by Transnistrian respondents.

Similarly to the findings for last year problems, rural respondents mentioned more often that they are currently facing problems with accessing essential products. The top three current problems for rural residents - high prices for food and non-food items and high cost of gas/fuel/electricity (89% each).

Figure 20.1: Q4.2. What are the main problems with accessing essential food and non-food items you have faced currently?, %

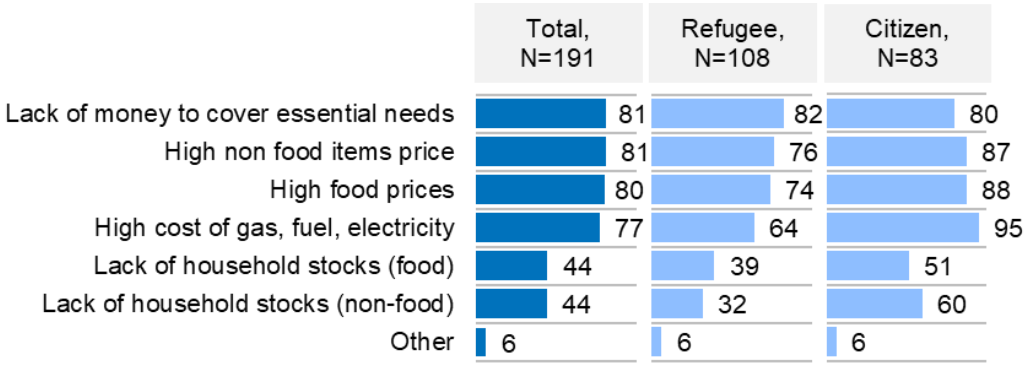


Figure 20.2: Q4.2. What are the main problems with accessing essential food and non-food items you have faced currently?, %

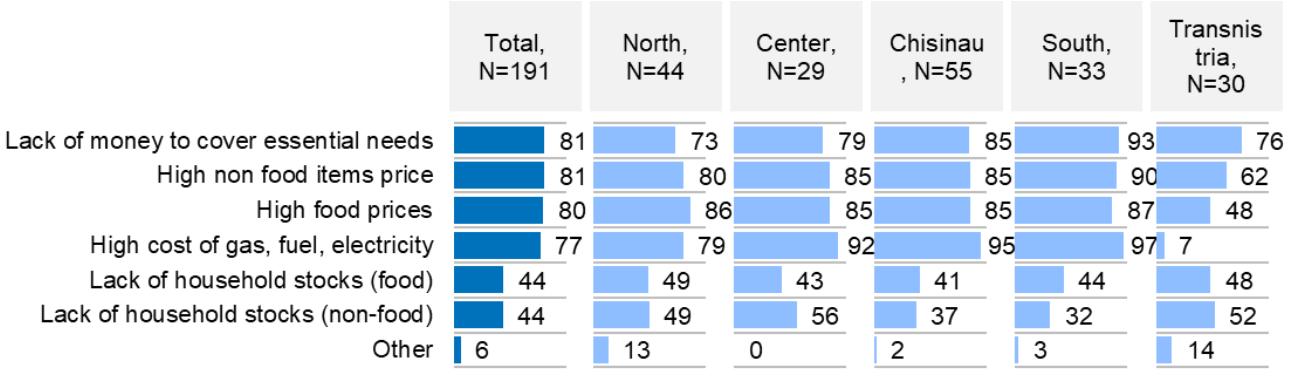


Figure 20.3: Q4.2. What are the main problems with accessing essential food and non-food items you have faced currently?, %

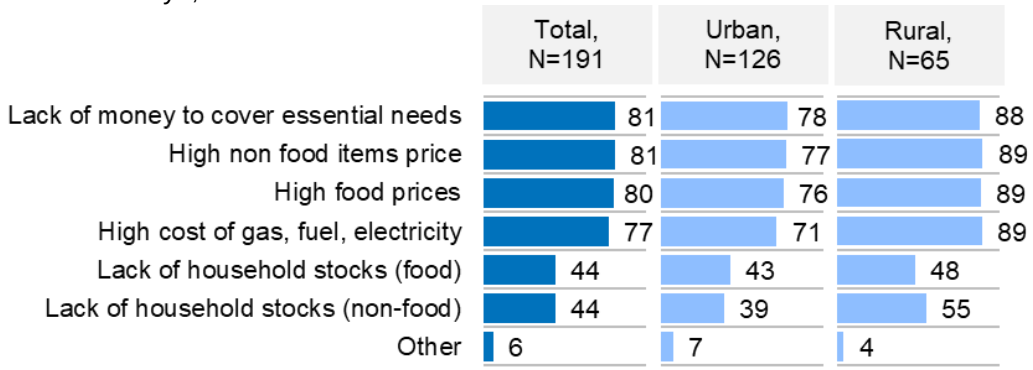


Figure 20.4: Q4.2. What are the main problems with accessing essential food and non-food items you have faced currently?, % disaggregated based on whether the respondents reported currently facing a lack of money to cover essential needs

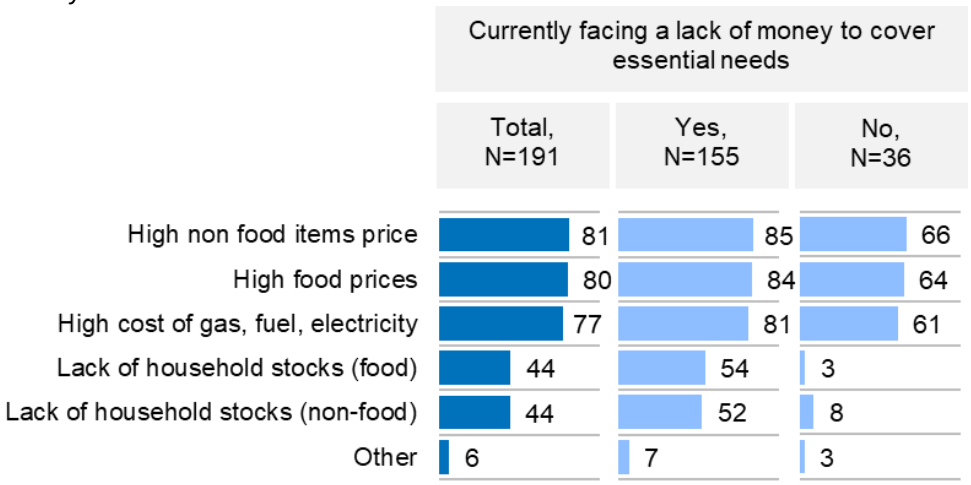
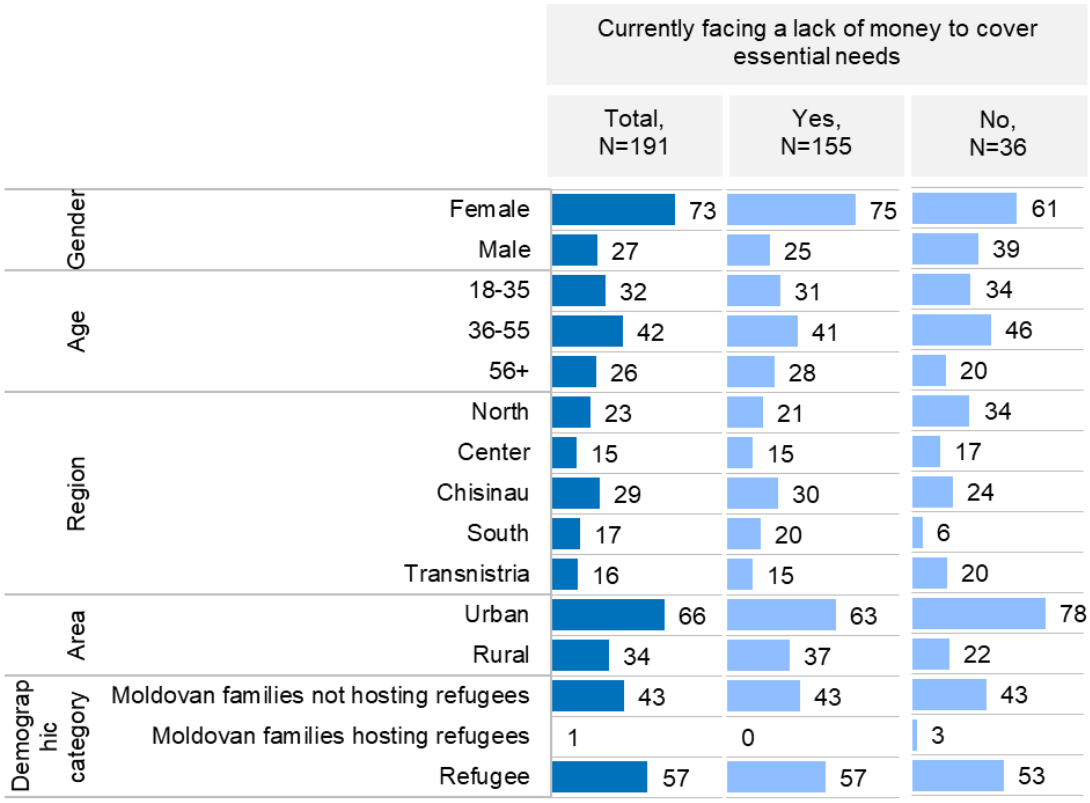


Figure 20.4: Profile of participants, disaggregated based on whether the respondents reported currently facing a lack of money to cover essential needs



To cope with problems related to accessing essential food and non-food items, the majority of respondents (84%) resort to using less desirable or cheaper items, while 36% - reduce healthcare/education costs. To a higher degree, refugees (45%) stated that they reduced costs related to healthcare and education in order to cope with the problems.

When analysing data across different regions and areas, there are several differences in terms of how respondents cope with the problems faced with access to essential products. 59% of Transnistrian respondents and 43% of Chisinau residents report reducing healthcare and education expenses to cope with the faced challenges in accessing essential products. Getting items on loan or getting help from friends

is how 38% of Transnistrian, 25% of Southern and 21% of Northern respondents cope with current problems in accessing essential products. Borrowing money was also indicated by 31% of Transnistrian respondents as a measure for coping with problems. Respondents from urban areas mentioned to a larger degree reducing healthcare/education costs in order to cope with the aforementioned problems (43%, +21 p.p. compared to rural areas).

Figure 21.1: Q4.3. How do you cope with these problems?, %

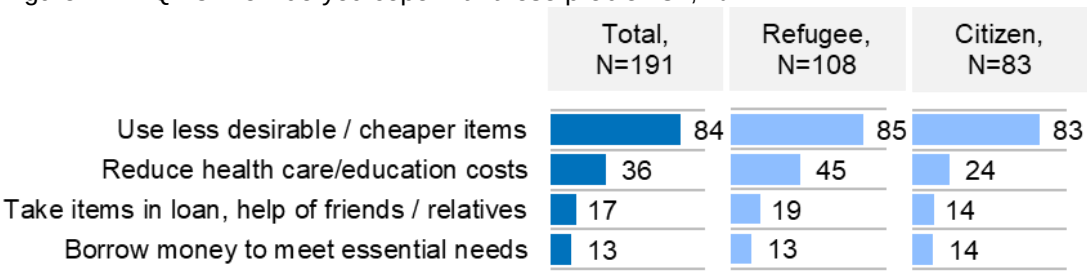


Figure 21.2: Q4.3. How do you cope with these problems?, %

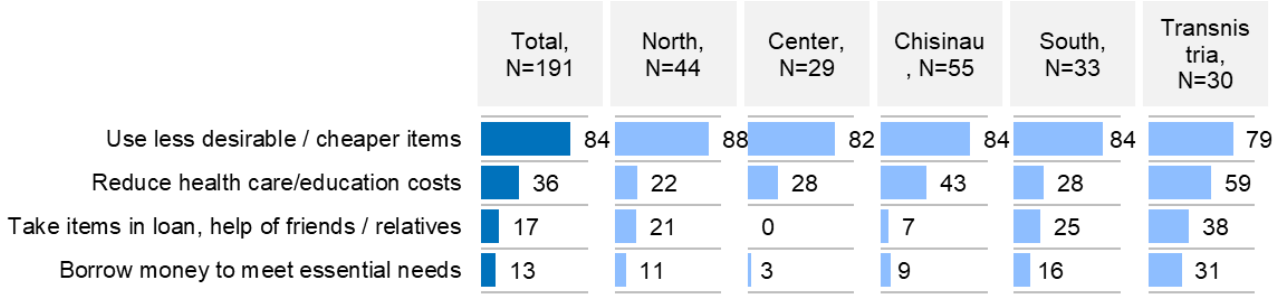
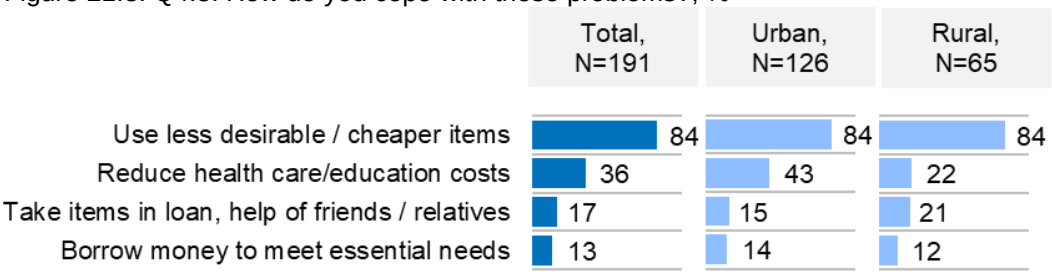


Figure 21.3: Q4.3. How do you cope with these problems?, %



1.5. Availability of financial service providers

The majority of respondents (69%) said there are bank branches with a full range of services in their settlement. 17% report that that bank branches are not available in their settlement, but in other settlements. Interviewed refugees mentioned to a higher degree that there are bank branches with a full range of services in their settlement (78%). Approximately a quarter of Moldovan respondents (27%) mentioned that full-service bank branches are not available in their settlement, but available in nearby settlements.

Respondents from Chisinau (89%) and the Central region of the country (71%) reported to a larger degree there are bank branches with a full range of services in their settlement. Respondents from the South (31%) and Centre (29%) more often indicated that there were no full-service bank branches in their locality. In terms of area differences, the availability of bank branches in the urban localities of the respondents is higher than in the respondents' villages – 46% of respondents from villages mentioned that there were no bank branches in their settlement.

Figure 22.1: Q5.1. Are there bank branches in your locality and are they currently open?, %

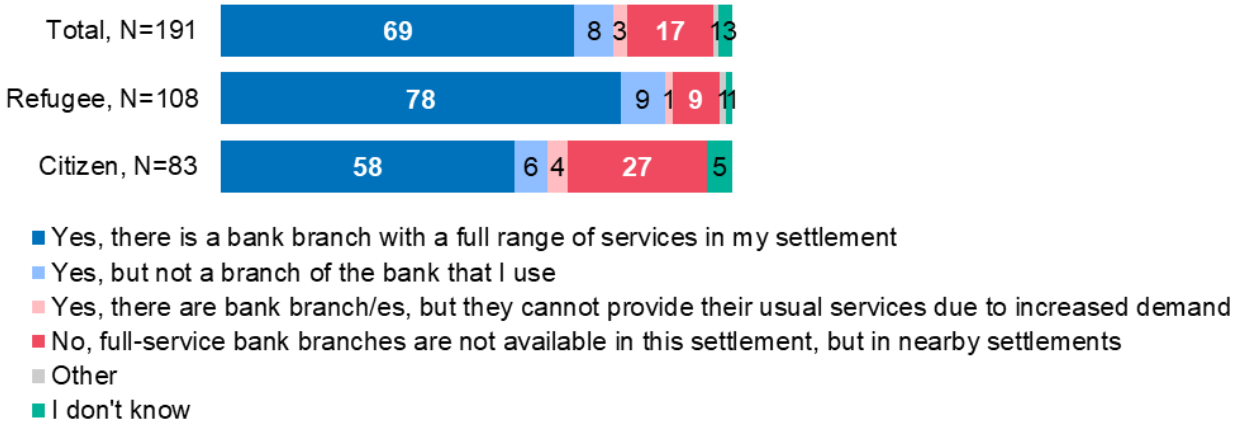


Figure 22.2: Q5.1. Are there bank branches in your locality and are they currently open?, %

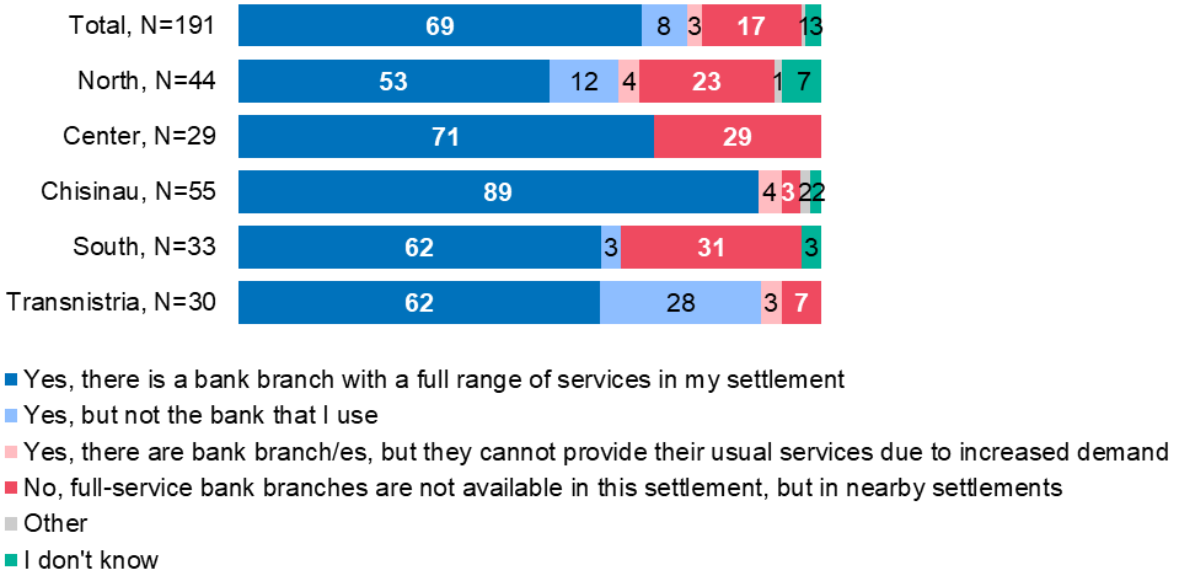
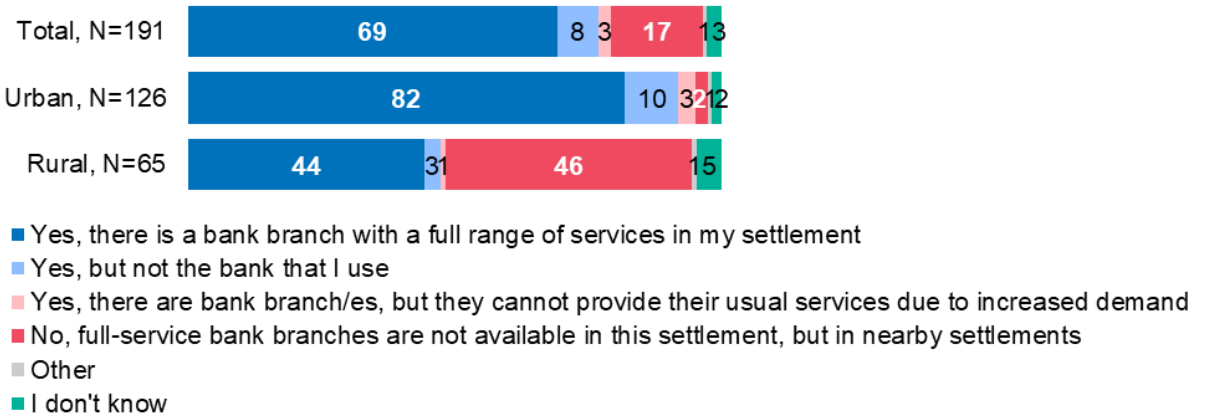


Figure 22.3: Q5.1. Are there bank branches in your locality and are they currently open?, %



Similar to the bank branch availability, most respondents (70%) have working fully functional ATMs in their localities. Refugees indicated to a larger degree that there is a fully functioning ATM in their locality (76%). On the other hand, one in ten refugees (10%) mentioned the presence of bank ATMs other than the bank they use.

In terms of regional differences, 93% of respondents from Chisinau indicated there are fully functioning ATMs in the city. One in three respondents in Transnistria (34%) mentioned that there is a different bank's ATMs in their settlement, and not ATMs of the bank they used. At the same time, respondents from urban areas mentioned to a larger degree that they had fully functioning ATMs in their settlement (79%, +26 p.p. compared to rural respondents).

Figure 23.1: Q5.2. Are there any ATMs in your locality and are they working?, %

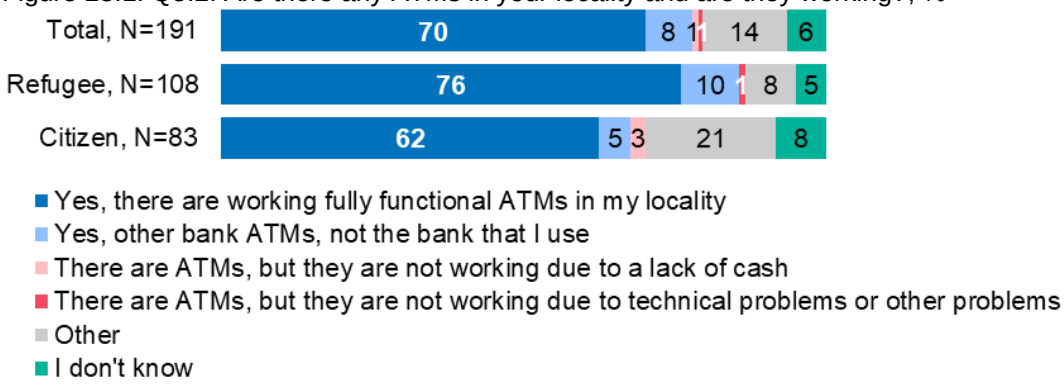


Figure 23.2: Q5.2. Are there any ATMs in your locality and are they working?, %

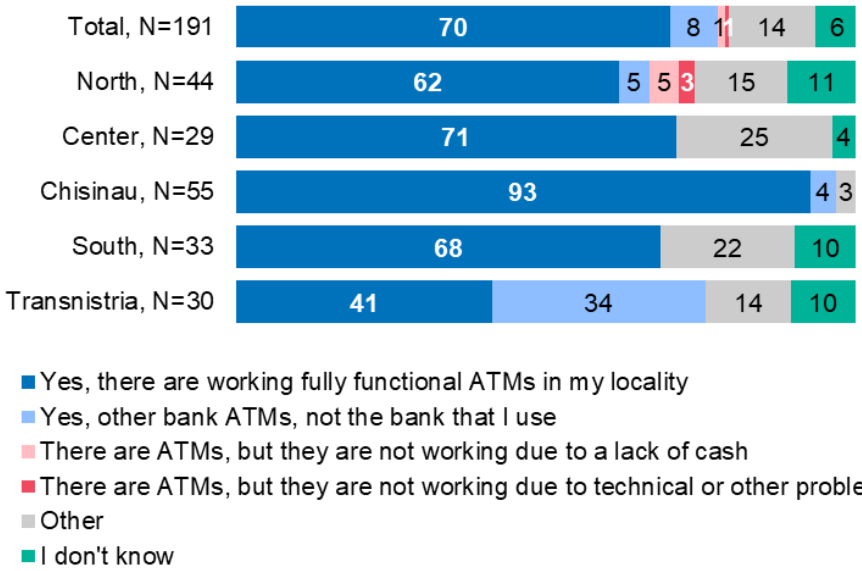
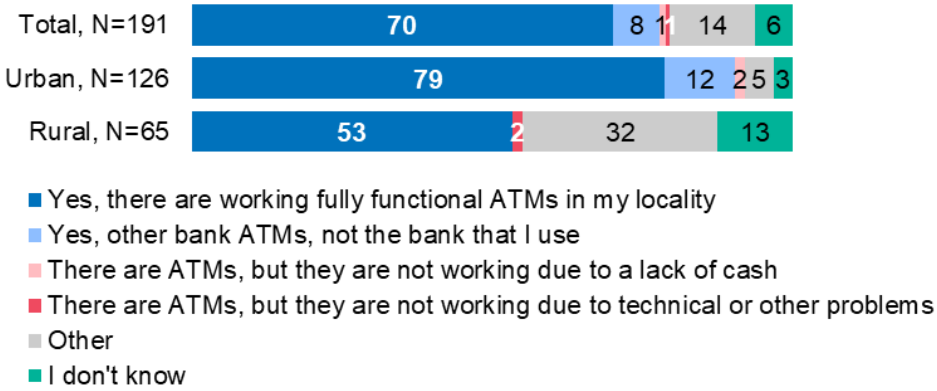


Figure 23.3: Q5.2. Are there any ATMs in your locality and are they working?, %



For almost half of the respondent (47%), the nearest located bank is less than 1 km away, with an average reported distance of 4.5 km. Moldovan citizens mentioned a larger distance to the nearest bank – 6.3 km.

Respondents from Chisinau have a bank at a distance of 1.1 km, on average. Respondents from Southern (7.5 km) and Central (6.9 km) regions reported the biggest average distanced to the nearest bank. When looking at differences across areas, respondents from rural areas are reportedly at a distance of 10.1 km to the nearest bank.

Figure 24.1: Q5.3. How far away is the nearest bank located?, %

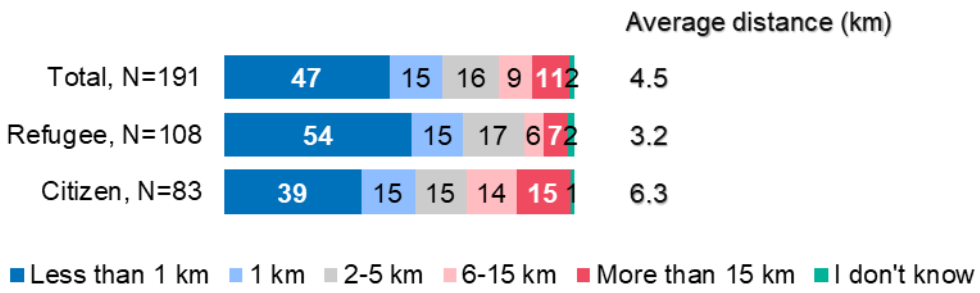


Figure 24.2: Q5.3. How far away is the nearest bank located?, %

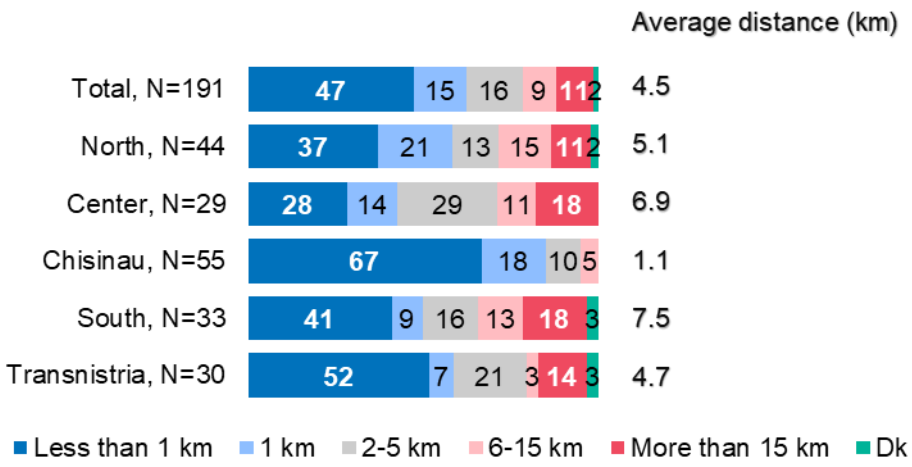


Figure 24.3: Q5.3. How far away is the nearest bank located?, %

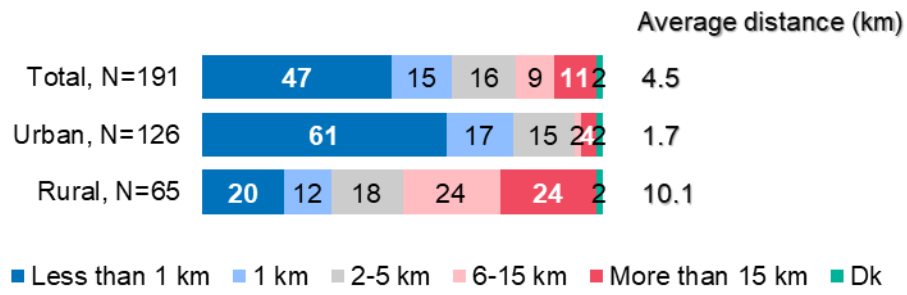
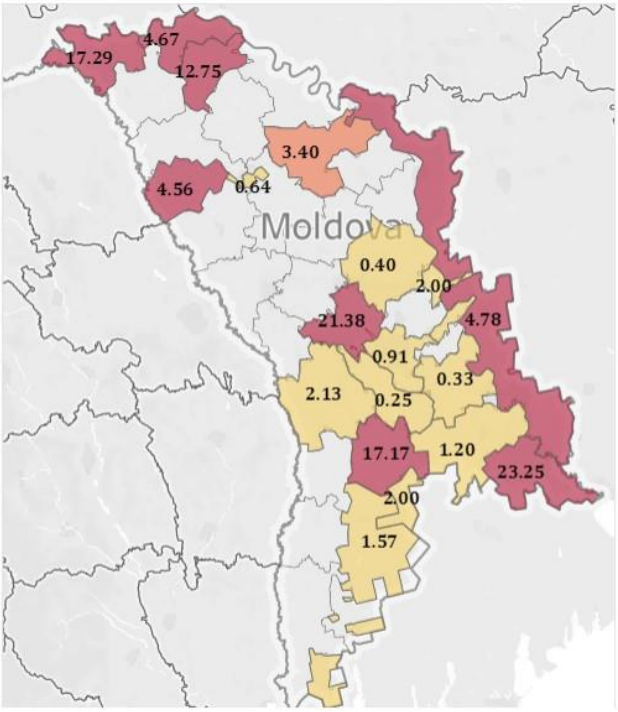


Figure 24.4: Q5.3. How far away is the nearest bank located?, average (km)



For half of the respondents (51%) the nearest located ATM is less than 1 km away. The average distance to the nearest located ATM is 3.6 km. Similar to the findings for the distance to the nearest bank, citizens reported bigger distances to nearest ATMs (4.7 km) compared to refugees (2.8 km).

Across regions, the biggest distances to the nearest ATMs were mentioned by respondents from Transnistria (5.4 km), South and Center (5.1 km). While respondents from rural areas reported bigger distances to ATMs (7.1 km) than those from urban areas, it is smaller compared to the distance to the nearest bank.

Figure 25.1: Q5.4. How far away is the nearest ATM located?, %

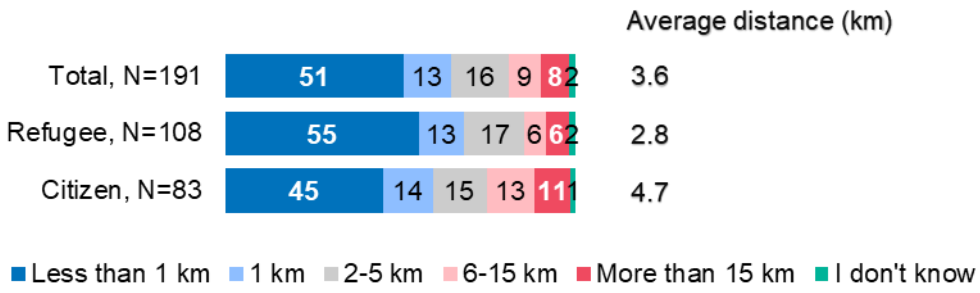


Figure 25.2: Q5.4. How far away is the nearest ATM located?, %

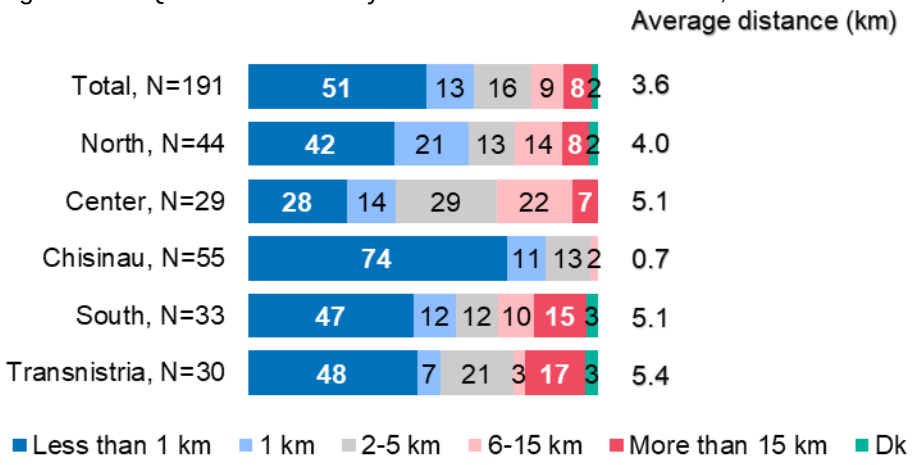


Figure 25.3: Q5.4. How far away is the nearest ATM located?, %

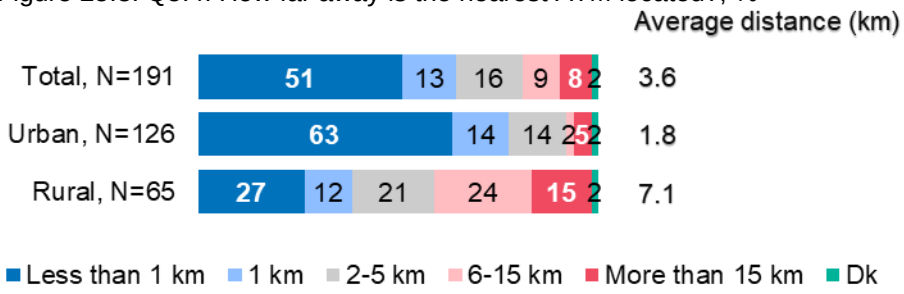
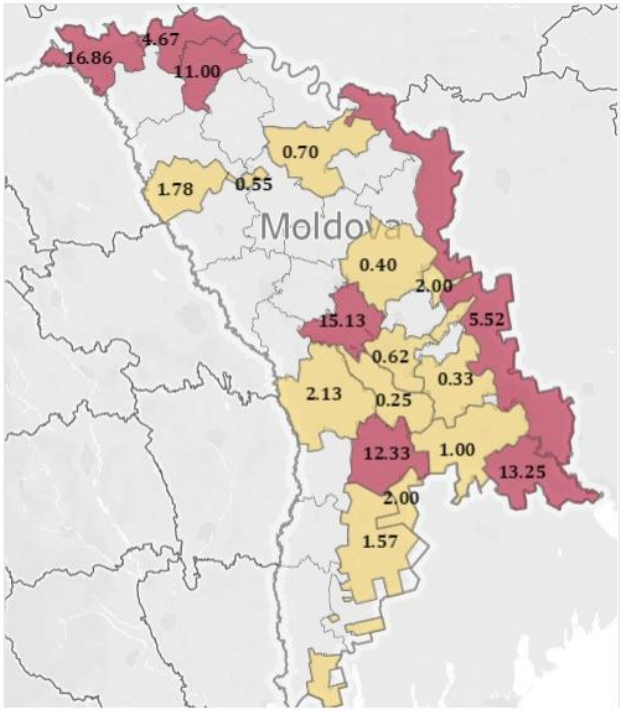


Figure 25.4: Q5.4. How far away is the nearest ATM located?, average (km)



Posta Moldovei is available in the localities of the majority of respondents, with a prevalence of 82%. Moreover, Posta Moldovei is the most widely available option in both the refugees' (76%) and Moldovans' (90%) localities. Western Union is available in 68% of the localities, while Money Gram is available in 59% of them. Refugees mentioned to a larger degree having Wester Union (72%) and MoneyGram (64%) in their settlements.

Across regions and areas, Posta Moldovei is the most widespread financial service, with the exception of availability in Transnistria (31%). Respondents from Chisinau (81%) and South (74%) mentioned to a larger degree that there are Western Union services in the locality. Respondents from rural areas reported to a larger degree having Posta Moldovei services in their locality (88%) and to a lower degree – having other financial services.

Figure 26.1: Q5.5. Are other financial services available in your locality (national and international financial transfers)?, %

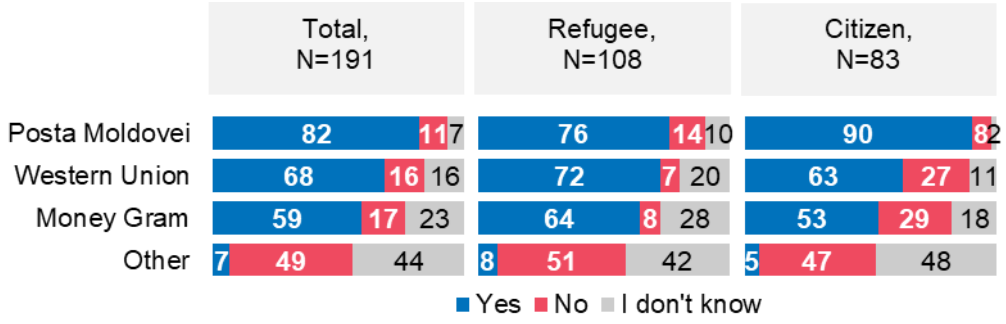


Figure 26.2: Q5.5. Are other financial services available in your locality (national and international financial transfers)?, % (yes)

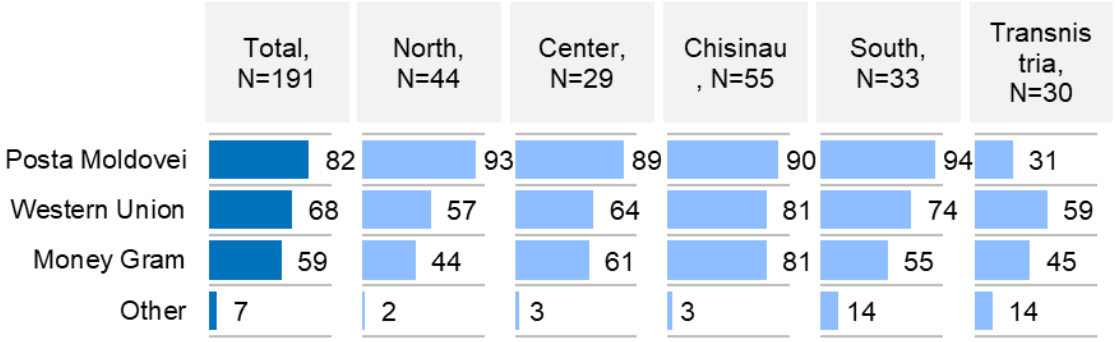
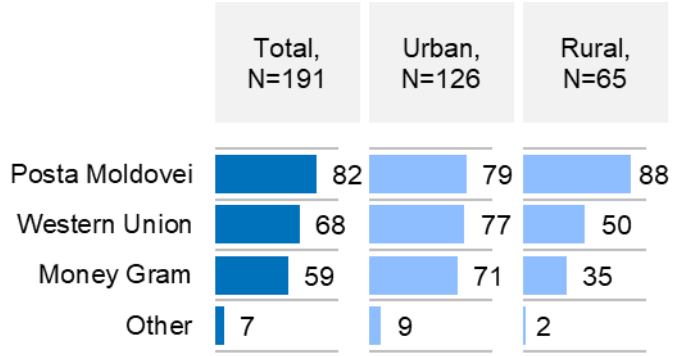


Figure 26.3: Q5.5. Are other financial services available in your locality (national and international financial transfers)?, % (yes)



The respondents that reported having financial services available in their settlements were asked about the providers' schedule. Most respondents that indicated having financial services in their settlements (88%) said that the financial service providers work every day and regularly provide all their financial services. Across regions, respondents from the Central and Transnistria regions mentioned to a larger degree that the financial services in their settlements work every day.

Figure 27.1: Q5.6. The financial service providers work..., %

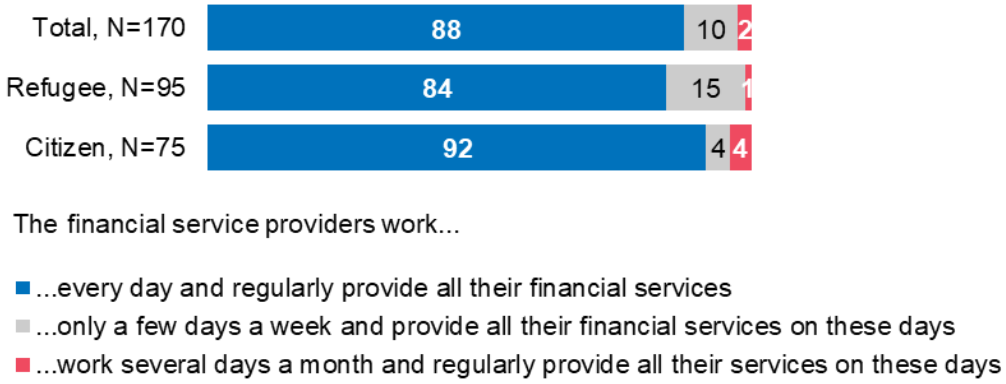


Figure 27.2: Q5.6. The financial service providers work..., %

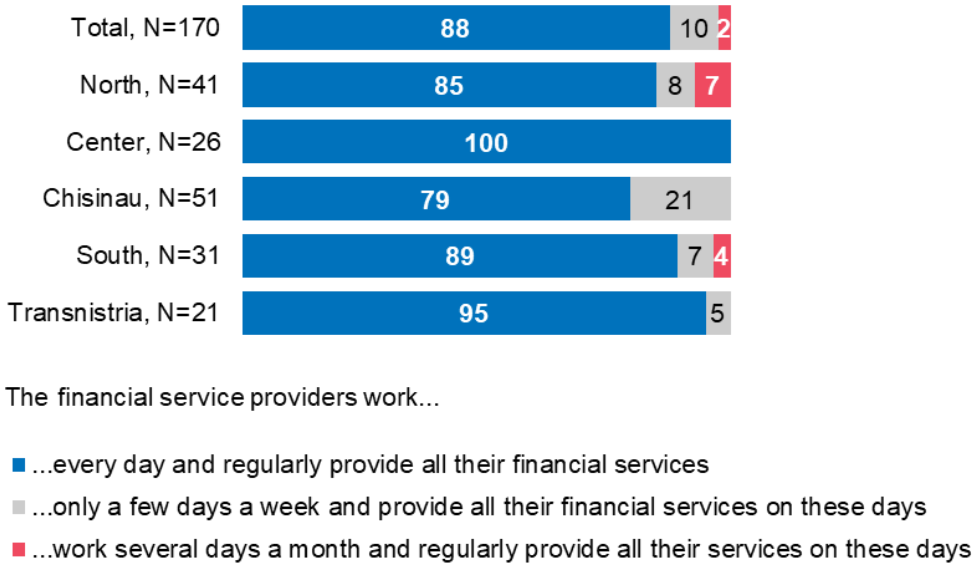
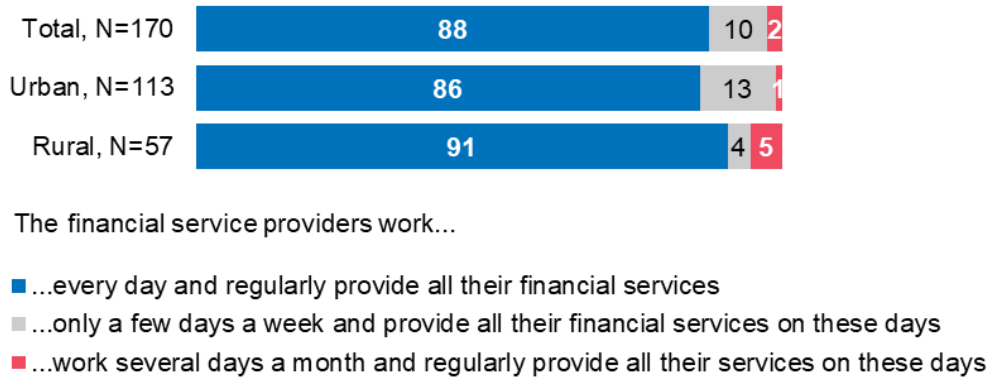


Figure 27.3: Q5.6. The financial service providers work..., %



Financial service providers appear to be located somewhat closer to respondents than banks and ATMs. For over half of the respondents (54%), the nearest financial service provider is located less than 1 km away (average – 2.1 km). On average, the distance to the nearest financial service provider is 1.6 km among interviewed refugees and 2.8 km among interviewed Moldovan citizens. In terms of regional and areal differences, respondents from the North (4.0 km) and from rural areas (4.4 km) mentioned a larger distance to the nearest financial service provider.

Figure 28.1: Q5.7. How far away is the nearest financial service provider located?, %

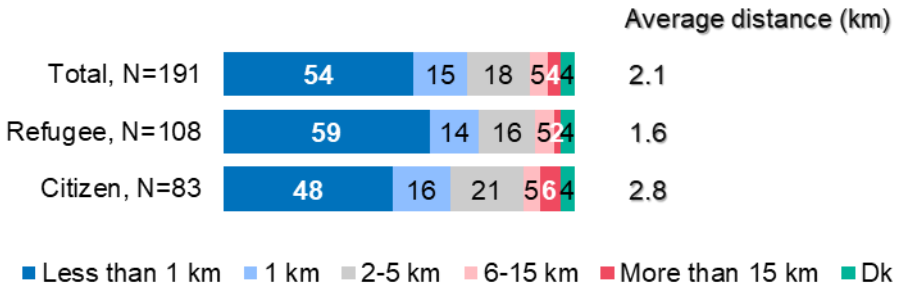


Figure 28.2: Q5.7. How far away is the nearest financial service provider located?, %

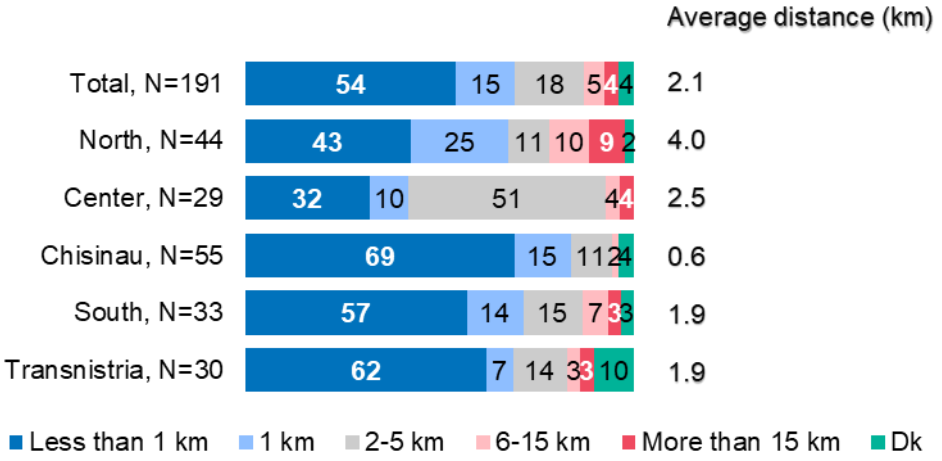
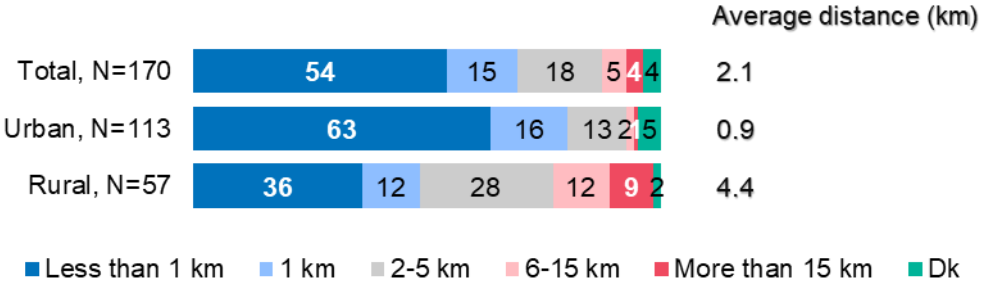


Figure 28.3: Q5.7. How far away is the nearest financial service provider located?, %



CHAPTER II: MARKET ASSESSMENT - SURVEY AMONG RETAILERS

2.1. Food items list

According to the collected data, most (63%) of the interviewed retailers have up to 200 items on sale. The top four foods sold in the surveyed retailers are: bakery products/pasta/corn/rice (46%), sugar/sweets (43%), vegetables and vegetable oil/butter (41%). As for non-food products that are usually sold in the shops from the sample, the top-3 are: drinking water (41%), hygiene products (30%), clothing and footwear (26%).

In terms of differences in products on sale across different regions*, respondents from the North indicated to a larger degree having most of the presented items on sale at their shop. Most of respondents from the Central region mentioned selling beans/lentils/peas at their shop. All retailers interviewed in rural areas* mentioned normally selling bread/pastry/etc., sugar/sweets, vegetables, oil/butter and dairy products at their shop.

Figure 29: What is the maximum number of distinct items on sale in this shop?, N=46, %

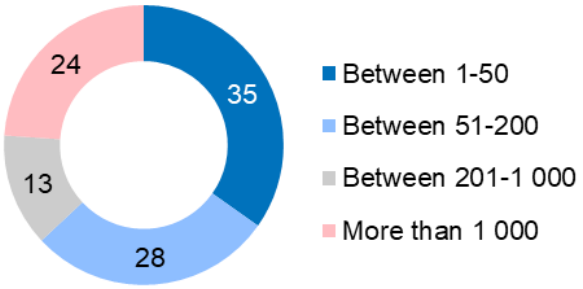


Figure 30.1: Q2.1. In your shop, what do you normally sell?, N=46, %

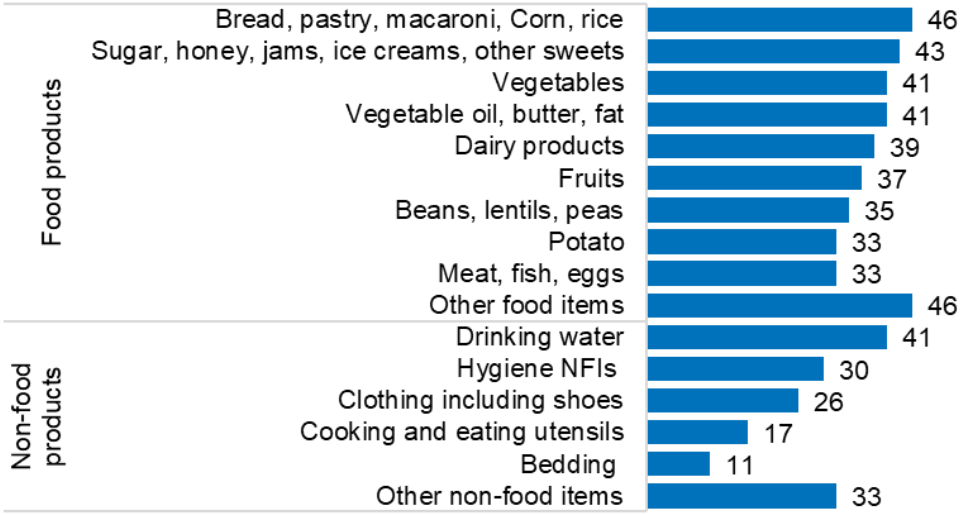


Figure 30.2: Q2.1. In your shop, what do you normally sell?, N=46, %

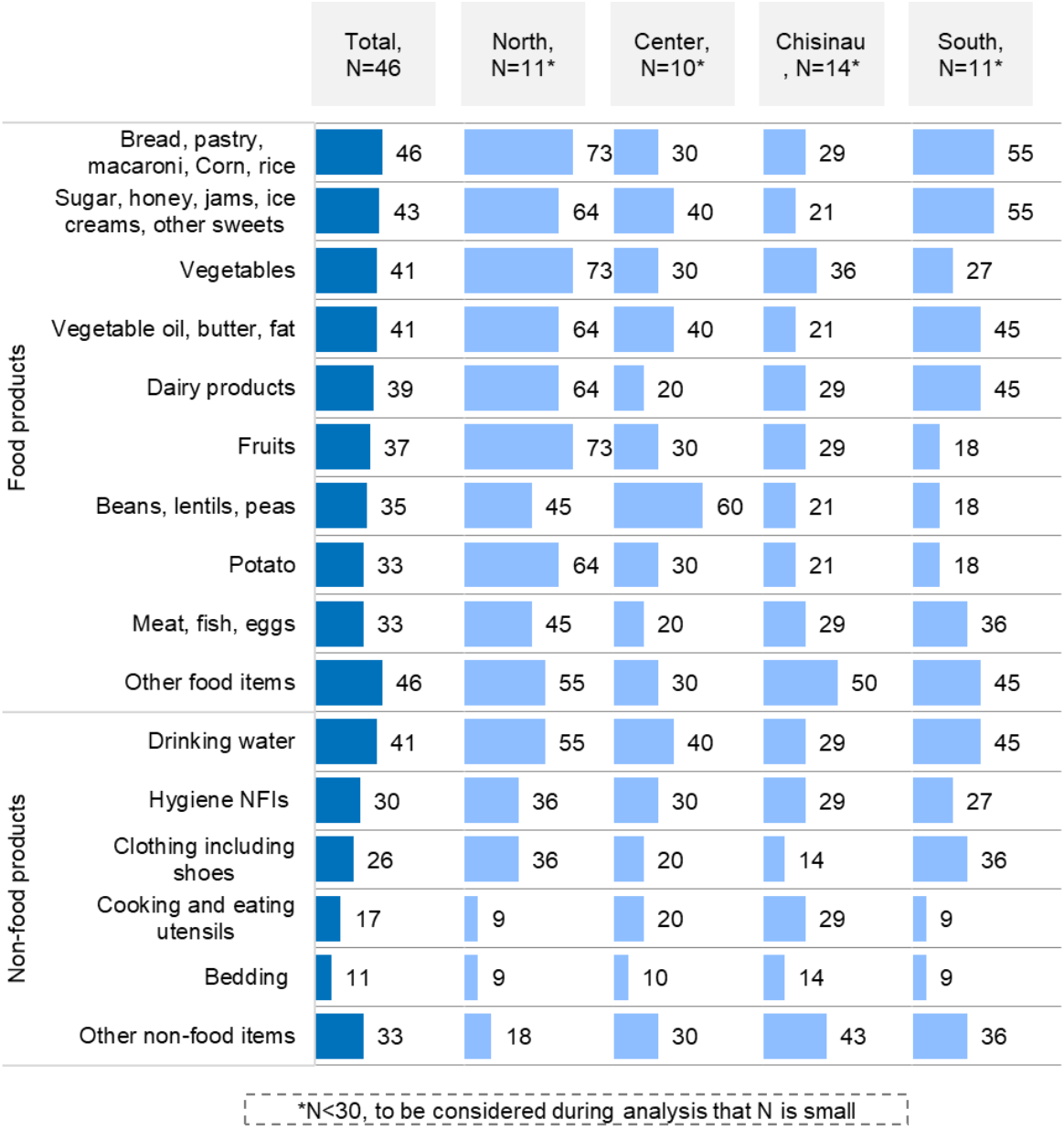
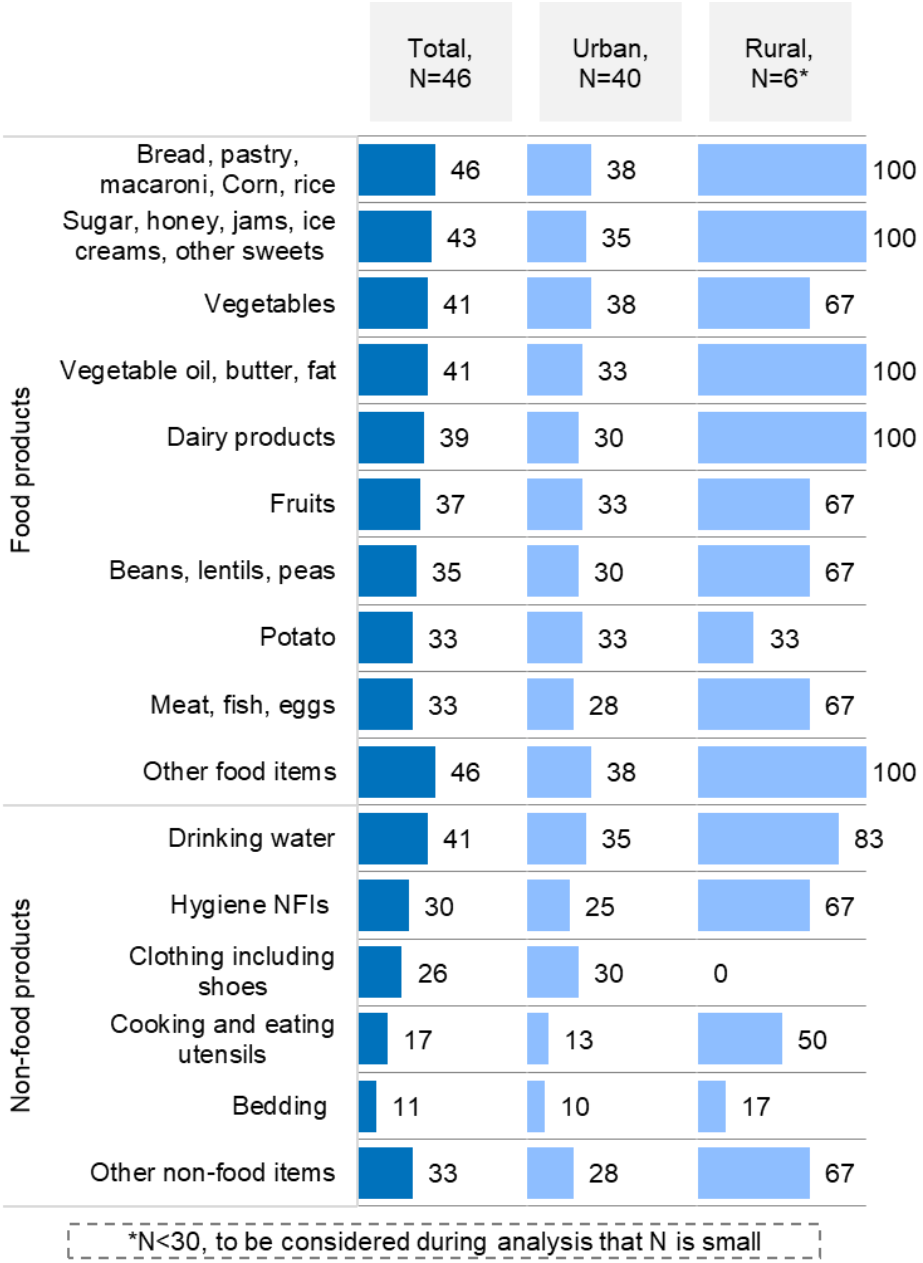


Figure 30.3: Q2.1. In your shop, what do you normally sell?, N=46, %



The majority of the shops that were included in the survey do not have a shortage of any of the listed products (76%). However, 11% specified that clothing and footwear were scarce in their shop, and 9% mentioned a shortage of fruit.

Respondents from the North* mentioned to a larger degree that fruit was scarce in their shop (27%). 30% of retailers interviewed in the Central region* indicated that there was a shortage of clothing in their shop. In terms of differences between areas*, rural area retailers indicated having a shortage of fruit at the time of the survey.

Figure 31.1: Q2.2. Are there any products that are currently scarce in your shop?, N=46, %

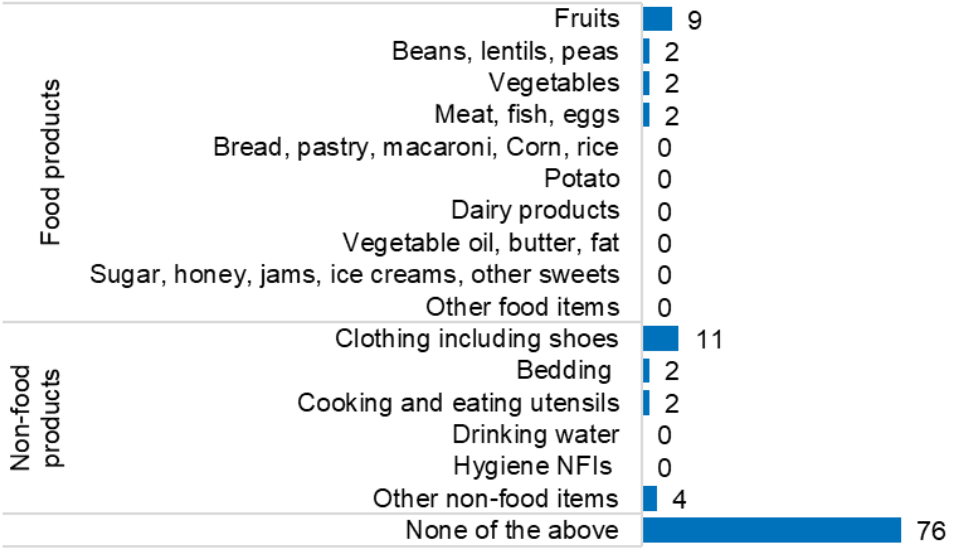


Figure 31.2: Q2.2. Are there any products that are currently scarce in your shop?, N=46, %

		Total, N=46	North, N=11*	Center, N=10*	Chisinau, N=14*	South, N=11*
Food products	Fruits	9	27	10	0	0
	Beans, lentils, peas	2	0	10	0	0
	Vegetables	2	9	0	0	0
	Meat, fish, eggs	2	0	10	0	0
	Bread, pastry, macaroni, Corn, rice	0	0	0	0	0
	Potato	0	0	0	0	0
	Dairy products	0	0	0	0	0
	Vegetable oil, butter, fat	0	0	0	0	0
	Sugar, honey, jams, ice creams, other sweets	0	0	0	0	0
	Other food items	0	0	0	0	0
Non-food products	Clothing including shoes	11	9	30	0	9
	Bedding	2	0	10	0	0
	Cooking and eating utensils	2	0	10	0	0
	Drinking water	0	0	0	0	0
	Hygiene NFIs	0	0	0	0	0
	Other non-food items	4	0	10	7	0
	None of the above	76	73	40	93	91

Figure 31.3: Q2.2. Are there any products that are currently scarce in your shop?, N=46, %

		Total, N=46	Urban, N=40	Rural, N=6*
Food products	Fruits	9	5	33
	Beans, lentils, peas	2	3	0
	Vegetables	2	3	0
	Meat, fish, eggs	2	3	0
	Bread, pastry, macaroni, Corn, rice	0	0	0
	Potato	0	0	0
	Dairy products	0	0	0
	Vegetable oil, butter, fat	0	0	0
	Sugar, honey, jams, ice creams, other sweets	0	0	0
	Other food items	0	0	0
Non-food products	Clothing including shoes	11	10	17
	Bedding	2	0	17
	Cooking and eating utensils	2	0	17
	Drinking water	0	0	0
	Hygiene NFIs	0	0	0
	Other non-food items	4	5	0
	None of the above	76	78	67

*N<30, to be considered during analysis that N is small

In general, sellers have no fear of running out of stock of the products they sell. At the same time, 27% of those who usually sell meat, fish and eggs are afraid of running out of stock during the week.

At least one of the usual sellers of staple products in the North is afraid of running out of stocks for most food items within a week from now. Three respondents from the urban areas that usually sell meat/fish/eggs are afraid they will run out of the stocks for this product in the next 7 days.

Figure 32.1: Q2.3. Are you afraid of running out of stocks within a week from now for…, %

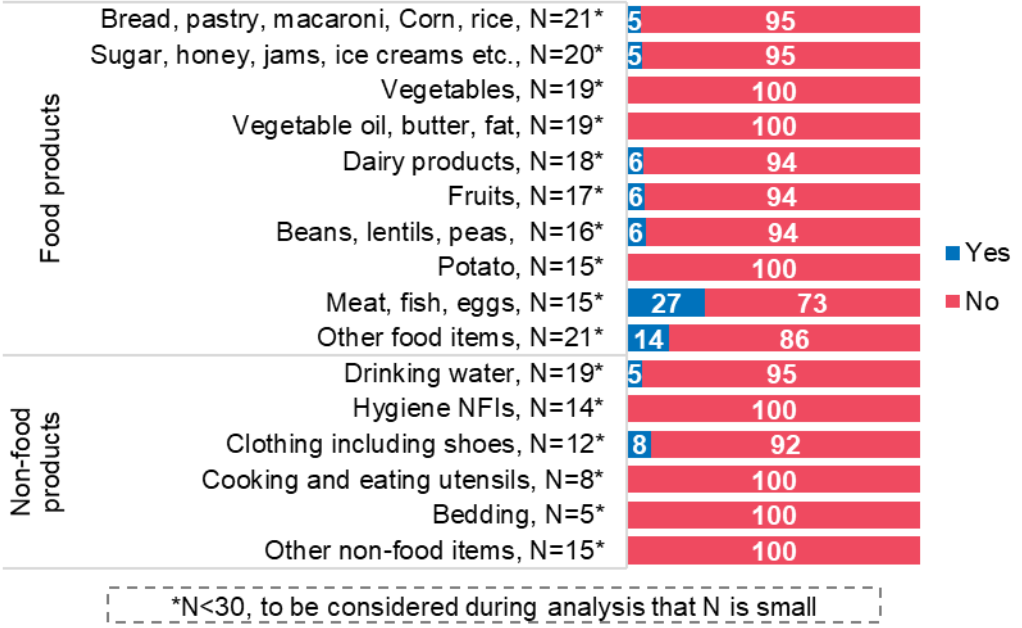


Figure 32.2: Q2.3. Are you afraid of running out of stocks within a week from now for…, N*

Afraid of running out of stocks for... (N per column)		Total	North	Center	Chisinau	South
Food products	Bread, pastry, macaroni, Corn, rice	**1**	1	0	0	0
	Sugar, honey, jams, ice creams, other sweets	**1**	1	0	0	0
	Vegetables	**0**	0	0	0	0
	Vegetable oil, butter, fat	**0**	0	0	0	0
	Dairy products	**1**	1	0	0	0
	Fruits	**1**	1	0	0	0
	Beans, lentils, peas	**1**	1	0	0	0
	Potato	**0**	0	0	0	0
	Meat, fish, eggs	**4**	2	1	1	0
	Other food items	**3**	1	0	2	0
Non-food products	Drinking water	**1**	0	0	0	1
	Hygiene NFIs	**0**	0	0	0	0
	Clothing including shoes	**1**	1	0	0	0
	Cooking and eating utensils	**0**	0	0	0	0
	Bedding	**0**	0	0	0	0
	Other non-food items	**0**	0	0	0	0

Figure 32.3: Q2.3. Are you afraid of running out of stocks within a week from now for…, N*

Afraid of running out of stocks for... (N per column)		Total	Urban	Rural
Food products	Bread, pastry, macaroni, Corn, rice	**1**	1	0
	Sugar, honey, jams, ice creams, other sweets	**1**	1	0
	Vegetables	**0**	0	0
	Vegetable oil, butter, fat	**0**	0	0
	Dairy products	**1**	0	1
	Fruits	**1**	1	0
	Beans, lentils, peas	**1**	1	0
	Potato	**0**	0	0
	Meat, fish, eggs	**4**	3	1
	Other food items	**3**	3	0
Non-food products	Drinking water	**1**	1	0
	Hygiene NFIs	**0**	0	0
	Clothing including shoes	**1**	1	0
	Cooking and eating utensils	**0**	0	0
	Bedding	**0**	0	0
	Other non-food items	**0**	0	0

For most staple products, the interviewed sellers generally have up to 2 suppliers for each type of product. However, among those who sell drinking water, clothes and cooking utensils, roughly half have 3-5 suppliers for these products. Furthermore, 43% of interviewees* that usually sell hygiene products have over 5 suppliers for these items.

When comparing the data between respondents from different regions and areas, respondents from Chisinau* appear to have on average more suppliers for the staple products they usually sell. Respondents from the Central region and rural areas* have fewer suppliers for their usual products.

Figure 33.1: Q2.4. How many suppliers do you have for…, %*

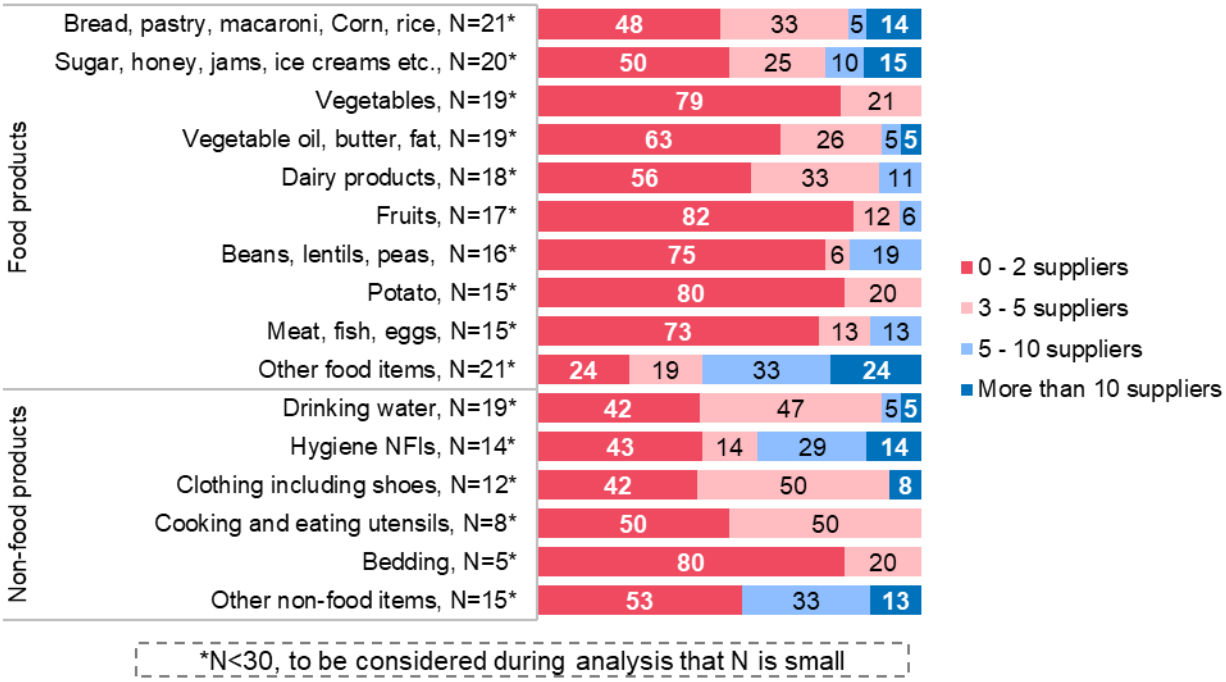


Figure 33.2: Q2.4. How many suppliers do you have for…, N*

N per row		North				
		Total N	0 - 2 suppliers	3 - 5 suppliers	5 - 10 suppliers	More than 10 suppliers
Food products	Bread, pastry, macaroni, Corn, rice	**8**	5	1	0	2
	Sugar, honey, jams, ice creams, other sweets	**7**	6	0	0	1
	Vegetables	**8**	7	1	0	0
	Vegetable oil, butter, fat	**7**	5	1	0	1
	Dairy products	**7**	3	3	1	0
	Fruits	**8**	7	0	1	0
	Beans, lentils, peas	**5**	3	0	2	0
	Potato	**7**	5	2	0	0
	Meat, fish, eggs	**5**	3	1	1	0
	Other food items	**6**	2	0	1	3
Non-food products	Drinking water	**6**	3	2	1	0
	Hygiene NFIs	**4**	2	0	0	2
	Clothing including shoes	**4**	1	2	0	1
	Cooking and eating utensils	**1**	0	1	0	0
	Bedding	**1**	1	0	0	0
	Other non-food items	**2**	1	0	0	1

Figure 33.3: Q2.4. How many suppliers do you have for…, N*

N per row		Center				
		Total N	0 - 2 suppliers	3 - 5 suppliers	5 - 10 suppliers	More than 10 suppliers
Food products	Bread, pastry, macaroni, Corn, rice	3	1	2	0	0
	Sugar, honey, jams, ice creams, other sweets	4	2	2	0	0
	Vegetables	3	3	0	0	0
	Vegetable oil, butter, fat	4	3	1	0	0
	Dairy products	2	2	0	0	0
	Fruits	3	2	1	0	0
	Beans, lentils, peas	6	6	0	0	0
	Potato	3	3	0	0	0
	Meat, fish, eggs	2	2	0	0	0
	Other food items	3	1	1	1	0
Non-food products	Drinking water	4	2	2	0	0
	Hygiene NFIs	3	3	0	0	0
	Clothing including shoes	2	1	1	0	0
	Cooking and eating utensils	2	2	0	0	0
	Bedding	1	1	0	0	0
	Other non-food items	3	2	0	0	1

Figure 33.4: Q2.4. How many suppliers do you have for…, N*

N per row		Chisinau				
		Total N	0 - 2 suppliers	3 - 5 suppliers	5 - 10 suppliers	More than 10 suppliers
Food products	Bread, pastry, macaroni, Corn, rice	4	1	3	0	0
	Sugar, honey, jams, ice creams, other sweets	3	0	1	2	0
	Vegetables	5	2	3	0	0
	Vegetable oil, butter, fat	3	0	3	0	0
	Dairy products	4	2	2	0	0
	Fruits	4	3	1	0	0
	Beans, lentils, peas	3	1	1	1	0
	Potato	3	2	1	0	0
	Meat, fish, eggs	4	3	1	0	0
	Other food items	7	1	1	4	1
Non-food products	Drinking water	4	1	2	0	1
	Hygiene NFIs	4	1	1	2	0
	Clothing including shoes	2	1	1	0	0
	Cooking and eating utensils	4	2	2	0	0
	Bedding	2	1	1	0	0
	Other non-food items	6	3	0	3	0

Figure 33.5: Q2.4. How many suppliers do you have for…, N*

N per row		South				
		Total N	0 - 2 suppliers	3 - 5 suppliers	5 - 10 suppliers	More than 10 suppliers
Food products	Bread, pastry, macaroni, Corn, rice	6	3	1	1	1
	Sugar, honey, jams, ice creams, other sweets	6	2	2	0	2
	Vegetables	3	3	0	0	0
	Vegetable oil, butter, fat	5	4	0	1	0
	Dairy products	5	3	1	1	0
	Fruits	2	2	0	0	0
	Beans, lentils, peas	2	2	0	0	0
	Potato	2	2	0	0	0
	Meat, fish, eggs	4	3	0	1	0
	Other food items	5	1	2	1	1
Non-food products	Drinking water	5	2	3	0	0
	Hygiene NFIs	3	0	1	2	0
	Clothing including shoes	4	2	2	0	0
	Cooking and eating utensils	1	0	1	0	0
	Bedding	1	1	0	0	0
	Other non-food items	4	2	0	2	0

Figure 33.6: Q2.4. How many suppliers do you have for…, N*

N per row		Urban				
		Total N	0 - 2 suppliers	3 - 5 suppliers	5 - 10 suppliers	More than 10 suppliers
Food products	Bread, pastry, macaroni, Corn, rice	**15**	7	4	1	3
	Sugar, honey, jams, ice creams, other sweets	**14**	6	3	2	3
	Vegetables	**15**	12	3	0	0
	Vegetable oil, butter, fat	**13**	7	4	1	1
	Dairy products	**12**	6	4	2	0
	Fruits	**13**	10	2	1	0
	Beans, lentils, peas	**12**	8	1	3	0
	Potato	**13**	10	3	0	0
	Meat, fish, eggs	**11**	7	2	2	0
	Other food items	**15**	1	3	6	5
Non-food products	Drinking water	**14**	6	6	1	1
	Hygiene NFIs	**10**	2	2	4	2
	Clothing including shoes	**12**	5	6	0	1
	Cooking and eating utensils	**5**	1	4	0	0
	Bedding	**4**	3	1	0	0
	Other non-food items	**11**	4	0	5	2

Figure 33.7: Q2.4. How many suppliers do you have for…, N*

N per row		Rural				
		Total N	0 - 2 suppliers	3 - 5 suppliers	5 - 10 suppliers	More than 10 suppliers
Food products	Bread, pastry, macaroni, Corn, rice	**6**	3	3	0	0
	Sugar, honey, jams, ice creams, other sweets	**6**	4	2	0	0
	Vegetables	**4**	3	1	0	0
	Vegetable oil, butter, fat	**6**	5	1	0	0
	Dairy products	**6**	4	2	0	0
	Fruits	**4**	4	0	0	0
	Beans, lentils, peas	**4**	4	0	0	0
	Potato	**2**	2	0	0	0
	Meat, fish, eggs	**4**	4	0	0	0
	Other food items	**6**	4	1	1	0
Non-food products	Drinking water	**5**	2	3	0	0
	Hygiene NFIs	**4**	4	0	0	0
	Clothing including shoes	**0**	0	0	0	0
	Cooking and eating utensils	**3**	3	0	0	0
	Bedding	**1**	1	0	0	0
	Other non-food items	**4**	4	0	0	0

While the majority of interviewed retailers reported an increase in prices for the products they sell, the reported increase is lower compared to the one mentioned by interviewed customers. Increases of up to 15% are the most common increment observed for items like beans (mentioned by 75% of interviewed retailers* that sell the item), drinking water (68%), and vegetable oil/butter/fat (58%). Conversely, around 50% of those selling hygiene products noted a higher increase in price, of up to 30%. Additionally, approximately 13% of interviewed retailers that sell potatoes and cooking utensils stated that the prices for these goods have increased by up to 50%. Across regions and areas*, the opinion about the price level changes for staple items sold by the interviewed retailers appears to be consistent.

Figure 34.1: Q2.5. What is the current retail price level change for…, %*

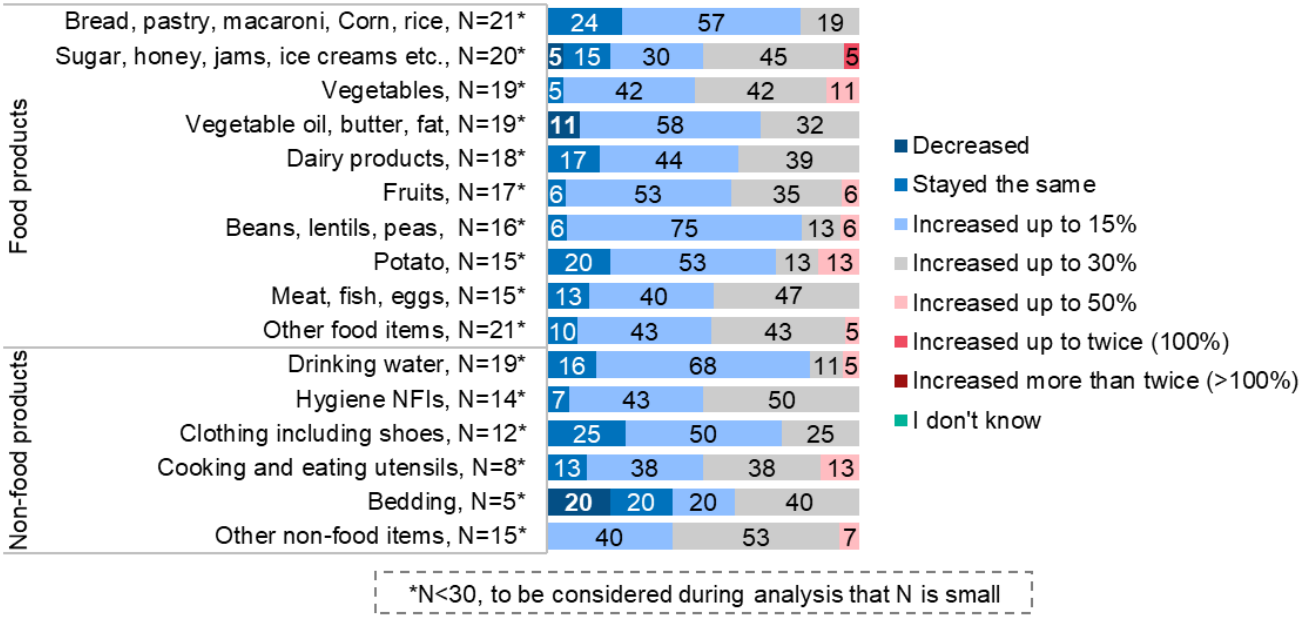


Figure 34.2: Q2.5. What is the current retail price level change for…, N*

N per row		North								
		Total N	Decreased	Stayed the same	Increased up to 15%	Increased up to 30%	Increased up to 50%	Increased up to twice (100%)	Increased more than twice (>100%)	Dk
Food products	Bread, pastry, macaroni, corn, rice	**8**	0	2	5	1	0	0	0	0
	Sugar, honey, jams, ice creams, sweets	**7**	0	2	2	3	0	0	0	0
	Vegetables	**8**	0	1	4	2	1	0	0	0
	Vegetable oil, butter, fat	**7**	0	0	3	4	0	0	0	0
	Dairy products	**7**	0	2	2	3	0	0	0	0
	Fruits	**8**	0	1	3	4	0	0	0	0
	Beans, lentils, peas	**5**	0	0	4	1	0	0	0	0
	Potato	**7**	0	1	5	1	0	0	0	0
	Meat, fish, eggs	**5**	0	1	0	4	0	0	0	0
	Other food items	**6**	0	0	3	3	0	0	0	0
Non-food products	Drinking water	**6**	0	1	5	0	0	0	0	0
	Hygiene NFIs	**4**	0	0	3	1	0	0	0	0
	Clothing including shoes	**4**	0	0	3	1	0	0	0	0
	Cooking and eating utensils	**1**	0	1	0	0	0	0	0	0
	Bedding	**1**	1	0	0	0	0	0	0	0
	Other non-food items	**2**	0	0	1	1	0	0	0	0

Figure 34.3: Q2.5. What is the current retail price level change for…, N*

N per row		Center								
		Total N	De creased	Stayed the same	In creased up to 15%	In creased up to 30%	In creased up to 50%	In creased up to twice (100%)	In creased more than twice (>100%)	Dk
Food products	Bread, pastry, macaroni, Corn, rice	3	0	1	1	1	0	0	0	0
	Sugar, honey, jams, ice creams, sweets	4	0	0	1	2	0	1	0	0
	Vegetables	3	0	0	1	2	0	0	0	0
	Vegetable oil, butter, fat	4	1	0	2	1	0	0	0	0
	Dairy products	2	0	0	1	1	0	0	0	0
	Fruits	3	0	0	2	1	0	0	0	0
	Beans, lentils, peas	6	0	1	3	1	1	0	0	0
	Potato	3	0	2	0	1	0	0	0	0
	Meat, fish, eggs	2	0	1	1	0	0	0	0	0
	Other food items	3	0	1	0	2	0	0	0	0
Non-food products	Drinking water	4	0	1	2	1	0	0	0	0
	Hygiene NFIs	3	0	1	1	1	0	0	0	0
	Clothing including shoes	2	0	1	0	1	0	0	0	0
	Cooking and eating utensils	2	0	0	0	2	0	0	0	0
	Bedding	1	0	0	0	1	0	0	0	0
	Other non-food items	3	0	0	0	3	0	0	0	0

Figure 34.4: Q2.5. What is the current retail price level change for…, N*

N per row		Chisinau								
		Total N	De creased	Stayed the same	In creased up to 15%	In creased up to 30%	In creased up to 50%	In creased up to twice (100%)	In creased more than twice (>100%)	Dk
Food products	Bread, pastry, macaroni, Corn, rice	4	0	0	3	1	0	0	0	0
	Sugar, honey, jams, ice creams, sweets	3	0	0	1	2	0	0	0	0
	Vegetables	5	0	0	2	2	1	0	0	0
	Vegetable oil, butter, fat	3	0	0	3	0	0	0	0	0
	Dairy products	4	0	0	2	2	0	0	0	0
	Fruits	4	0	0	2	1	1	0	0	0
	Beans, lentils, peas	3	0	0	3	0	0	0	0	0
	Potato	3	0	0	2	0	1	0	0	0
	Meat, fish, eggs	4	0	0	2	2	0	0	0	0
	Other food items	7	0	0	3	3	1	0	0	0
Non-food products	Drinking water	4	0	1	1	1	1	0	0	0
	Hygiene NFIs	4	0	0	1	3	0	0	0	0
	Clothing including shoes	2	0	1	1	0	0	0	0	0
	Cooking and eating utensils	4	0	0	3	0	1	0	0	0
	Bedding	2	0	0	1	1	0	0	0	0
	Other non-food items	6	0	0	4	1	1	0	0	0

Figure 34.5: Q2.5. What is the current retail price level change for…, N*

N per row		South								
		Total N	De creased	Stayed the same	In creased up to 15%	In creased up to 30%	In creased up to 50%	In creased up to twice (100%)	In creased more than twice (>100%)	Dk
Food products	Bread, pastry, macaroni, Corn, rice	**6**	0	2	3	1	0	0	0	0
	Sugar, honey, jams, ice creams, sweets	**6**	1	1	2	2	0	0	0	0
	Vegetables	**3**	0	0	1	2	0	0	0	0
	Vegetable oil, butter, fat	**5**	1	0	3	1	0	0	0	0
	Dairy products	**5**	0	1	3	1	0	0	0	0
	Fruits	**2**	0	0	2	0	0	0	0	0
	Beans, lentils, peas	**2**	0	0	2	0	0	0	0	0
	Potato	**2**	0	0	1	0	1	0	0	0
	Meat, fish, eggs	**4**	0	0	3	1	0	0	0	0
	Other food items	**5**	0	1	3	1	0	0	0	0
Non-food products	Drinking water	**5**	0	0	5	0	0	0	0	0
	Hygiene NFIs	**3**	0	0	1	2	0	0	0	0
	Clothing including shoes	**4**	0	1	2	1	0	0	0	0
	Cooking and eating utensils	**1**	0	0	0	1	0	0	0	0
	Bedding	**1**	0	1	0	0	0	0	0	0
	Other non-food items	**4**	0	0	1	3	0	0	0	0

Figure 34.6: Q2.5. What is the current retail price level change for…, N*

N per row		Urban								
		Total N	De creased	Stayed the same	In creased up to 15%	In creased up to 30%	In creased up to 50%	In creased up to twice (100%)	In creased more than twice (>100%)	Dk
Food products	Bread, pastry, macaroni, Corn, rice	**15**	0	3	9	3	0	0	0	0
	Sugar, honey, jams, ice creams, sweets	**14**	1	3	3	6	0	1	0	0
	Vegetables	**15**	0	1	6	6	2	0	0	0
	Vegetable oil, butter, fat	**13**	2	0	7	4	0	0	0	0
	Dairy products	**12**	0	2	6	4	0	0	0	0
	Fruits	**13**	0	1	8	3	1	0	0	0
	Beans, lentils, peas	**12**	0	0	10	1	1	0	0	0
	Potato	**13**	0	2	7	2	2	0	0	0
	Meat, fish, eggs	**11**	0	2	4	5	0	0	0	0
	Other food items	**15**	0	2	6	6	1	0	0	0
Non-food products	Drinking water	**14**	0	3	8	2	1	0	0	0
	Hygiene NFIs	**10**	0	1	5	4	0	0	0	0
	Clothing including shoes	**12**	0	3	6	3	0	0	0	0
	Cooking and eating utensils	**5**	0	1	2	1	1	0	0	0
	Bedding	**4**	1	1	1	1	0	0	0	0
	Other non-food items	**11**	0	0	5	5	1	0	0	0

Figure 34.7: Q2.5. What is the current retail price level change for…, N*

N per row		Rural								
		Total N	De creased	Stayed the same	In creased up to 15%	In creased up to 30%	In creased up to 50%	In creased up to twice (100%)	In creased more than twice (>100%)	Dk
Food products	Bread, pastry, macaroni, Corn, rice	**6**	0	2	3	1	0	0	0	0
	Sugar, honey, jams, ice creams, sweets	**6**	0	0	3	3	0	0	0	0
	Vegetables	**4**	0	0	2	2	0	0	0	0
	Vegetable oil, butter, fat	**6**	0	0	4	2	0	0	0	0
	Dairy products	**6**	0	1	2	3	0	0	0	0
	Fruits	**4**	0	0	1	3	0	0	0	0
	Beans, lentils, peas	**4**	0	1	2	1	0	0	0	0
	Potato	**2**	0	1	1	0	0	0	0	0
	Meat, fish, eggs	**4**	0	0	2	2	0	0	0	0
	Other food items	**6**	0	0	3	3	0	0	0	0
Non-food products	Drinking water	**5**	0	0	5	0	0	0	0	0
	Hygiene NFIs	**4**	0	0	1	3	0	0	0	0
	Clothing including shoes	**0**	0	0	0	0	0	0	0	0
	Cooking and eating utensils	**3**	0	0	1	2	0	0	0	0
	Bedding	**1**	0	0	0	1	0	0	0	0
	Other non-food items	**4**	0	0	1	3	0	0	0	0

Overall, most of the interviewed retailers say they cannot accurately estimate price of the items they sell in a week's time. The top three products, for which the interviewees mentioned they could not estimate the price for in a week's time were hygiene items (86%* of sellers of these items said they could not anticipate the price), vegetables (84%) and fruit (82%). On the other hand, 58% of those selling clothing and 44% of beans/lentils/peas sellers say they can estimate what the price of these items will be in a week's time.

In terms of regional differences*, at least one interviewed seller in Chisinau states that they could get the price right for all of the listed products. The retailers interviewed in urban areas* also appear to be more sure that they could predict what price for the products they sell would be in a week's time.

Figure 35.1: Q2.6.1. If we ask you what the price will be in a week from now, would you get it right for…, %*

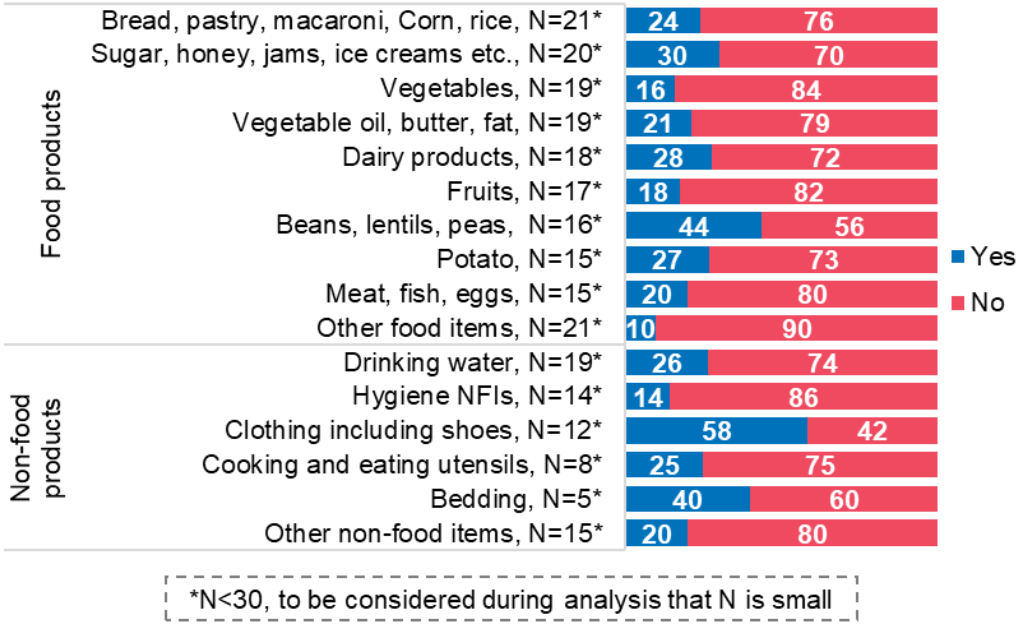


Figure 35.2: Q2.6.1. If we ask you what the price will be in a week from now, would you get it right for…, N*

If we ask you what the price will be in a week from now, you would get it right for... (N per column)		Total	North	Center	Chisinau	South
Food products	Bread, pastry, macaroni, Corn, rice	**5**	1	0	2	2
	Sugar, honey, jams, ice creams, other sweets	**6**	2	1	1	2
	Vegetables	**3**	1	0	2	0
	Vegetable oil, butter, fat	**4**	0	1	1	2
	Dairy products	**5**	2	0	1	2
	Fruits	**3**	1	0	2	0
	Beans, lentils, peas	**7**	1	3	2	1
	Potato	**4**	0	2	2	0
	Meat, fish, eggs	**3**	1	0	1	1
	Other food items	**2**	0	0	1	1
Non-food products	Drinking water	**5**	1	1	1	2
	Hygiene NFIs	**2**	0	0	1	1
	Clothing including shoes	**7**	2	0	2	3
	Cooking and eating utensils	**2**	0	0	1	1
	Bedding	**2**	0	0	1	1
	Other non-food items	**3**	0	0	2	1

Figure 35.3: Q2.6.1. If we ask you what the price will be in a week from now, would you get it right for…, N*

If we ask you what the price will be in a week from now, you would get it right for... (N per column)		Total	Urban	Rural
Food products	Bread, pastry, macaroni, Corn, rice	**5**	4	1
	Sugar, honey, jams, ice creams, other sweets	**6**	4	2
	Vegetables	**3**	2	1
	Vegetable oil, butter, fat	**4**	4	0
	Dairy products	**5**	3	2
	Fruits	**3**	2	1
	Beans, lentils, peas	**7**	6	1
	Potato	**4**	4	0
	Meat, fish, eggs	**3**	2	1
	Other food items	**2**	2	0
Non-food products	Drinking water	**5**	4	1
	Hygiene NFIs	**2**	2	0
	Clothing including shoes	**7**	7	0
	Cooking and eating utensils	**2**	2	0
	Bedding	**2**	2	0
	Other non-food items	**3**	3	0

An additional exercise for collecting prices from 12 supermarkets in different regions of the country (North, Centre, Chisinau and South) was conducted. Prices were collected for the cheapest variety of the product. Using the price-check data and the product consumption data from the National Bureau of Statistics, monthly expenditure for the consumption of the basic food and hygiene products was calculated. The total monthly sum for the included basic food and hygiene goods amounted to 3140 MDL.

Table 5: Basic food and hygiene products consumption costs, per person

Product category	Product	Average price (MDL)[10]	Price per category (average price for included products), MDL	Monthly consumption per person (units)[11]	Monthly consumption per category per person (MDL)
Bread, pastry, macaroni, Corn, rice	Bread, 1 unit	5.65	5.65	10.03	56.69
	Macaroni, 1 kg	25.54	25.54	2.85	72.78
	Corn, 1 kg	13.21	15.77	7.50	118.25
	Rice, 1 kg	19.27			
	Buckwheat, 1 kg	19.33			
	Wheat flour, 1 kg	11.25			
Beans	Beans, 1 kg	29.00	20.54	0.60	12.32
	Peas, 1 kg	12.08			
Vegetables	Cucumbers, 1 kg	28.67	23.76	9.90	235.26
	Cabbage, 1 kg	12.93			
	Carrots, 1 kg	21.02			
	Tomatoes, 1 kg	34.23			
	Onions, 1 kg	21.96			
Fruit	Apples, 1 kg	14.61	26.01	5.84	151.88
	Bananas, 1 kg	33.37			
	Oranges, 1 kg	30.04			
Meat, fish, eggs	Beef, 1 kg	127.94	96.57	4.40	424.89
	Chicken, 1 kg	65.19			
	Fish, 1 kg	89.48	89.48	1.60	143.17
	Eggs, 10 units	25.49	25.49	1.80	45.88
Dairy	Milk, 1 l	13.58	61.52	20.16	1240.26
	Cheese, 1 kg	140.39			
Butter	Butter, 200 g	30.60			
Oil	Sunflower oil, 1 l	30.29	30.29	0.98	29.69
Sugar	Sugar, 1 kg	22.53	22.53	1.84	41.45
Water	Drinking water, 1.5 l	10.50	10.50	40.00	420.03
Hygiene items	Toilet paper	7.60	7.60	8.00	60.79
	Toothbrush, 1 unit	14.95	14.95	0.33	4.93
	Toothpaste, 1 unit	26.70	26.70	0.50	13.35
	Laundry detergent, 1 kg	47.45	47.45	0.20	9.49
	Liquid dish detergent, 500 ml	20.45	20.45	0.38	7.77
	Sanitary napkins, 10 units	25.92	25.92	1.50	38.88
	Soap 100 gr	11.12	11.12	1.08	12.01
TOTAL					**3140**

2.2. Suppliers

Most of the interviewed retailers of basic food (61%) and non-food (71%) products state that usually they do not work with only one supplier (61%). At the same time, 4-5 retailer respondents from North and Centre* mention they usually work with one supplier of basic food items. Chisinau* and urban area* retailers that participated in the survey mostly work with two or more main suppliers of food and non-food items. In terms of differences by retailer size, interviewed retailers that sell over 1000 items* in their shop reported to larger degree having multiple main suppliers of essential food and non-food items.

[10] Based on data of price-check conducted in 12 supermarkets in all regions of Moldova. Data were collected during 7-11 June 2023

[11] Calculated based on the National Bureau of Statistics data, for person's monthly living expenditures amount (https://statbank.statistica.md/PxWeb/pxweb/en/30%20Statistica%20sociala/30%20Statistica%20sociala_04%20NIV_NIV020/NIV020200.px/table/tableViewLayout1/?rxid=b2ff27d7-0b96-43c9-934b-42e1a2a9a774)

Figure 36.1: 3.1/3.5. Does your company work mainly with one supplier of…, % of retailers that sell the items

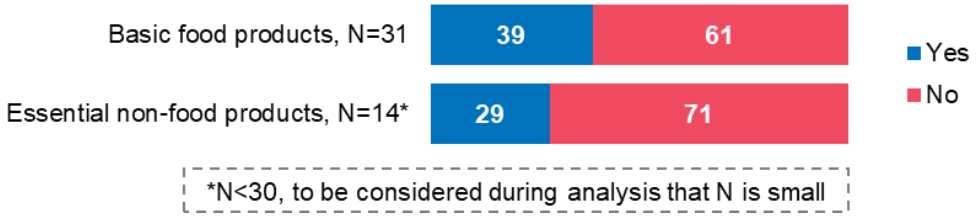


Figure 36.2: 3.1/3.5. Does your company work mainly with one supplier of…, N of retailers that sell the items

N per column		Total	North	Center	Chisinau	South
Mainly work with one supplier of basic food products	**Total N**	**31**	**9**	**7**	**9**	**6**
	Yes	**12***	4	5	1	2
	No	**19***	5	2	8	4
Mainly work with one supplier of essential non-food products	**Total N**	**14***	**4**	**3**	**4**	**3**
	Yes	**4***	2	2	0	0
	No	**10***	2	1	4	3

Figure 36.3: 3.1/3.5. Does your company work mainly with one supplier of…, N of retailers that sell the items

N per column		Total	Urban	Rural
Mainly work with one supplier of basic food products	**Total N**	**31**	**25**	**6**
	Yes	**12***	9	3
	No	**19***	16	3
Mainly work with one supplier of essential non-food products	**Total N**	**14***	**10**	**4**
	Yes	**4***	1	3
	No	**10***	9	1

Figure 36.4: 3.1/3.5. Does your company work mainly with one supplier of…, N of retailers that sell the items, disaggregated by number of distinct items on sale

N per column		Total	Between 1-50 of items	Between 51-200 of items	Between 201-1,000 of items	More than 1,000 of items
Mainly work with one supplier of basic food products	**Total N**	**31**	**8**	**10**	**5**	**8**
	Yes	**12***	4	5	1	2
	No	**19***	4	5	4	6
Mainly work with one supplier of essential non-food products	**Total N**	**14***	**1**	**2**	**3**	**8**
	Yes	**4***	0	0	2	2
	No	**10***	1	2	1	6

68% of respondents that sell food products and 43% - of those that sell non-food products-mention that their main supplier is in the same area where the store is located. 29% of food products' sellers and 43% of non-food products' sellers say the main supplier is located in a different area.

Respondents from urban areas (17 respondents), North (7 respondents), Centre (6 respondents) and Chisinau (7 respondents) indicated to larger degree* that their main supplier of food products is located in their area. Four of retailers located in Chisinau mention their main non-food supplier is in their area, and 4 of Northern respondents stated that their supplier is outside the area.

Figure 37.1: 3.2. Is your main supplier of basic food products (reference to the list above) in this area?/ 3.6. Is your main supplier of essential non-food products in this area?, % of retailers that sell the items

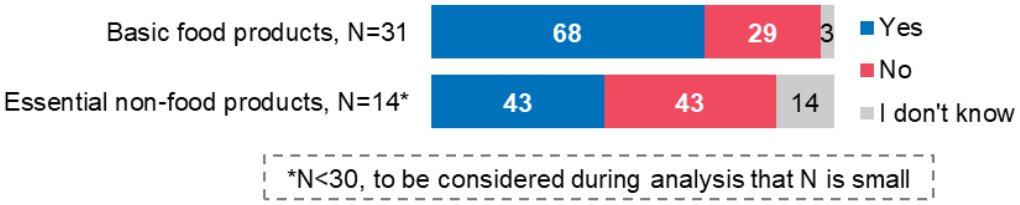


Figure 37.2: 3.2. Is your main supplier of basic food products (reference to the list above) in this area?/ 3.6. Is your main supplier of essential non-food products in this area?, N of retailers that sell the items

N per column		Total	North	Center	Chisinau	South
Main supplier of basic food products is in this area	**Total N**	**31**	**9**	**7**	**9**	**6**
	Yes	**21***	7	6	7	1
	No	**9***	2	0	2	5
	I don't know	**1***	0	1	0	0
Main supplier of essential non-food products is in this area	**Total N**	**14***	**4**	**3**	**4**	**3**
	Yes	**6***	0	1	4	1
	No	**6***	4	0	0	2
	I don't know	**2***	0	2	0	0

Figure 37.3: 3.2. Is your main supplier of basic food products (reference to the list above) in this area?/ 3.6. Is your main supplier of essential non-food products in this area?, N of retailers that sell the items

N per column		Total	Urban	Rural
Main supplier of basic food products is in this area	**Total N**	**31**	**25**	**6**
	Yes	**21***	17	4
	No	**9***	8	1
	I don't know	**1***	0	1
Main supplier of essential non-food products is in this area	**Total N**	**14***	**10**	**4**
	Yes	**6***	4	2
	No	**6***	5	1
	I don't know	**2***	1	1

All suppliers of food and non-food products located in a different area than that of the stores included in the study are located in another region of Moldova. The suppliers of food and non-food products outside of respondents' areas are predominantly from Chisinau. Respondents state that most of the food products, which the main supplier provides, come from another region of Moldova than the one where the shop is located - mainly from Chisinau.

Table 6: Where is your main supplier of…, N* of respondents whose main supplier is outside their area

Products, N	Total	In another region of Moldova	In another country	I don't know
Basic food products	**9***	9	0	0
Essential non-food products	**6***	6	0	0

Table 7: If another region, please specify, N* of respondents whose main supplier is in another region of Moldova

Products, N	Total	Mun. Chisinau	Criuleni	UTA Gagauzia	Ungheni	Balti
Basic food products	**9***	6	1	1	1	0
Essential non-food products	**6***	5	0	0	0	1

Table 8: Where do most of the goods come from your main supplier of…, N* of respondents whose main supplier is in their area

Products, N	Total	From another region of Moldova	From another country	I don't know
Basic food products	**21***	20	0	1
Essential hygiene products	**6***	5	1	0

Table 9.1: If another region or country, please specify. N* of respondents whose main supplier is in their area and mainly gets their goods from another region of Moldova

Products	Total, N	Mun. Chisinau	Orhei	Criuleni	Edinet	Mun. Balti	Cimislia	Floresti
Basic food products	**20***	10	3	2	2	1	1	1
Essential hygiene products	**5***	5	0	0	0	0	0	0

Table 9.2: If another region or country, please specify. N* of respondents whose main supplier is in their area and mainly gets their goods from another region of Moldova

N per row		Total N	Mun. Chisinau	Orhei	Criuleni	Edinet	Mun. Balti	Cimislia	Floresti
Basic food products	**Total**	**20***	**10**	**3**	**2**	**2**	**1**	**1**	**1**
	North	**6***	2	0	0	2	1	0	1
	Center	**6***	1	3	1	0	0	1	0
	Chisinau	**7***	6	0	1	0	0	0	0
	South	**1***	1	0	0	0	0	0	0
Essential hygiene products	**Total**	**5***	**5**	**0**	**0**	**0**	**0**	**0**	**0**
	North	**0**	0	0	0	0	0	0	0
	Center	**1***	1	0	0	0	0	0	0
	Chisinau	**4***	4	0	0	0	0	0	0
	South	**0**	0	0	0	0	0	0	0

More than half of respondents mention that considering the customers' current demand, the current stocks would last for up to 14 days (59%). A quarter of respondents have stocks for 30 days (26%).

Respondents from the Central region* appear to have the lowest stocks – 80% mention their current stocks would last for up to 14 days, considering their customers' demand. Respondents from the South* indicated longer periods for how long the current stocks would last – 63% say their stocks would last for over 2 weeks. Compared to the respondents from rural areas, those from urban areas mentioned longer periods for which their stocks would last (43% vs 33% in rural areas*). 31% of interviewed retailers that sell less than 50 distinct items mentioned that their current stock would have lasted for more than one month.

Figure 38.1: Q4.1. Considering your customers' current demand, for how many days would your current stocks last?, N=46, %

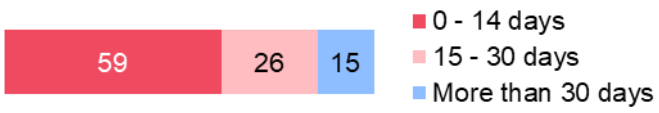


Figure 38.2: Q4.1. Considering your customers' current demand, for how many days would your current stocks last?, N=46, %

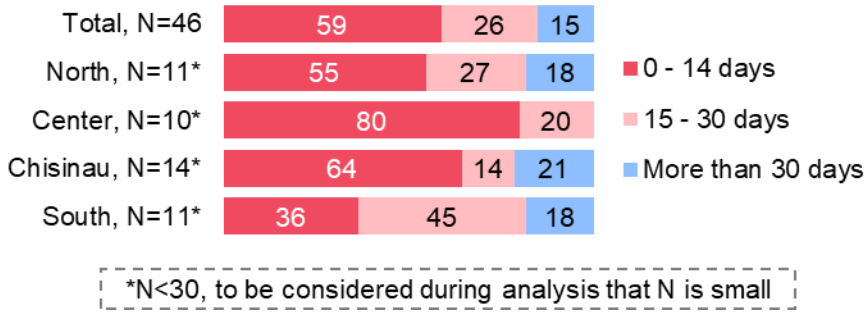


Figure 38.3: Q4.1. Considering your customers' current demand, for how many days would your current stocks last?, N=46, %

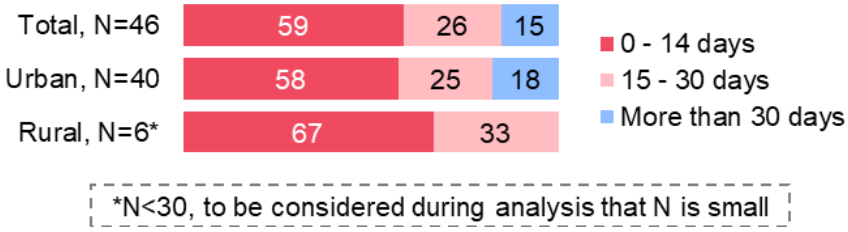
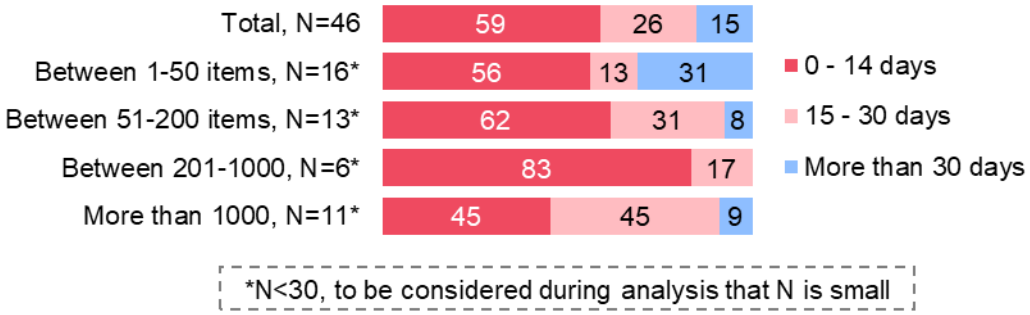


Figure 38.4: Q4.1. Considering your customers' current demand, for how many days would your current stocks last?, N=46, %, disaggregated by number of distinct items on sale



87% of interviewed retailers say that they would expect to receive the products within a week when placing an order. Respondents from the Central region* are most sure that they would receive an order within a week. When asked about the location of suppliers, 78% of interviewees mention that the majority of their suppliers are located geographically in the same place. Respondents from the Southern region* indicated to a larger degree (55%) that most of their suppliers were not located in the same area.

Figure 39.1: Q4.2. If you place an order today, do you expect to receive your products within a week?, N=46, %

Figure 39.2: Q4.2. If you place an order today, do you expect to receive your products within a week?, N=46, %

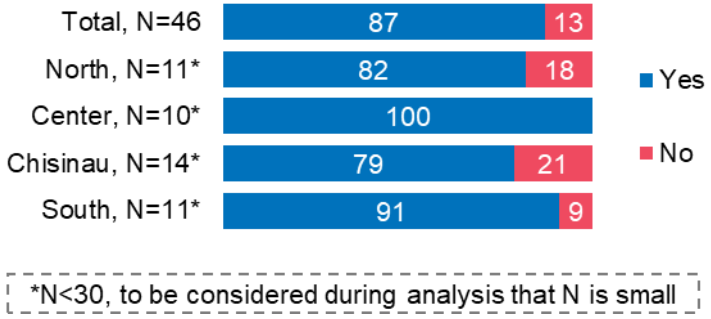


Figure 39.3: Q4.2. If you place an order today, do you expect to receive your products within a week?, N=46, %

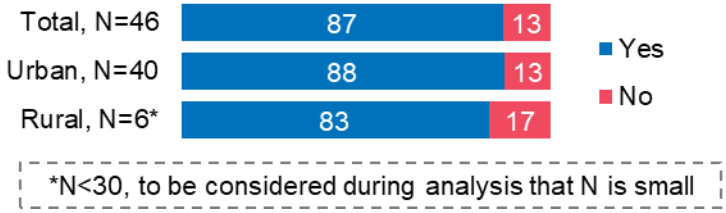


Figure 40.1: Q4.3. Are most of your suppliers geographically located in the same place?, N=46, %

Figure 40.2: Q4.3. Are most of your suppliers geographically located in the same place?, N=46, %

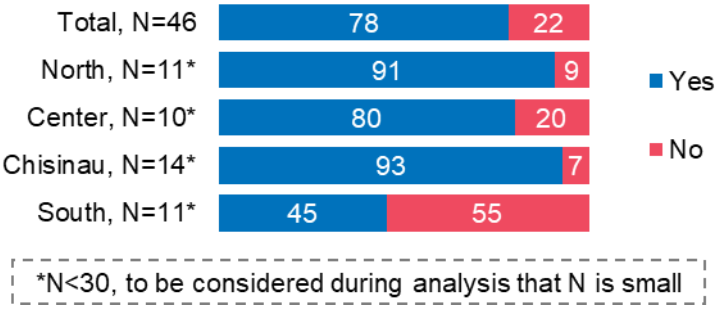
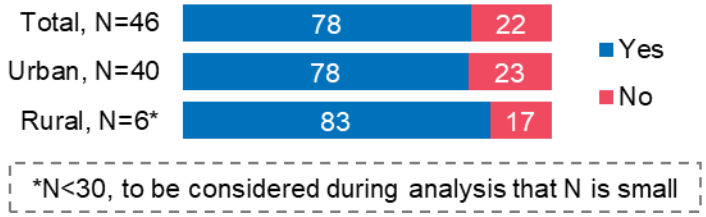


Figure 40.3: Q4.3. Are most of your suppliers geographically located in the same place?, N=46, %



Most interviewed retailers assessed their stores as being in good state, intact, and with no maintenance issues (87%). On the other hand, 13% mentioned their shop had maintenance issues. Compared to other regions' interviewees, respondents from the Central region* mention to larger degree that their shop is not in a good state of maintenance (30%). The same opinion was expressed by 15% of respondents from urban areas.

Figure 41.1: Q4.4. Which of the following best describes this market/shop?, %

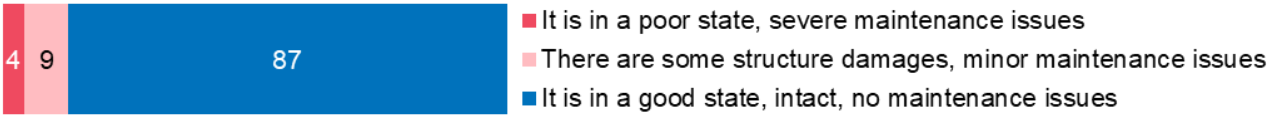


Figure 41.2: Q4.4. Which of the following best describes this market/shop?, %

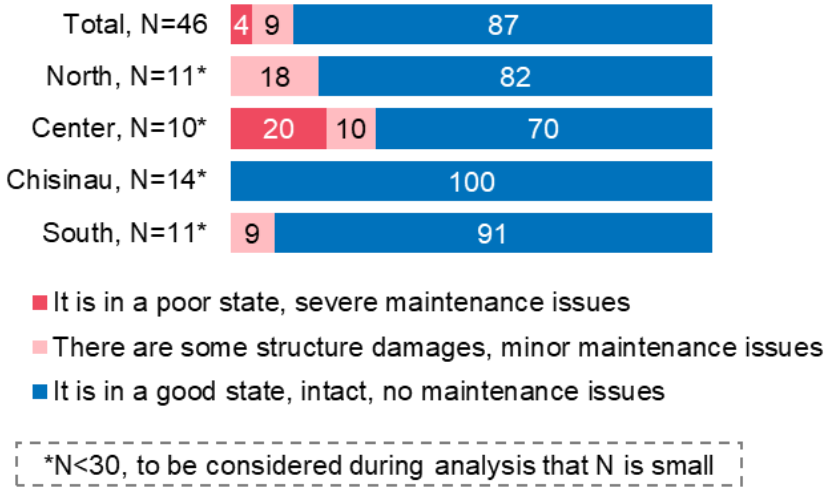
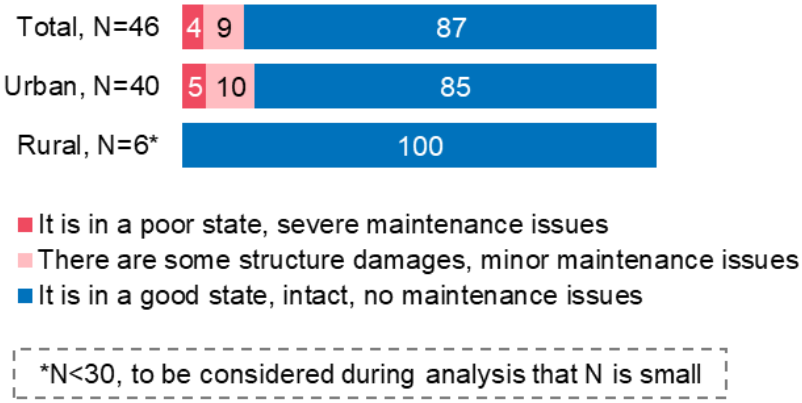


Figure 41.3: Q4.4. Which of the following best describes this market/shop?, %



2.3. Services

Almost all of the respondents mentioned that the products in their store are displayed in a way which makes the price tag visibility (100%) and identification/selection of products (98%) easy. Most also mentioned that the waiting time at the checkout was under 10 minutes (83%), the receipts were automatic (78%) and the shop accepted more than one form of payment (61%). On the other hand, 78% of interviewed retailers say that it is not possible to purchase from the shop remotely.

In terms of region differences, respondents from Chisinau indicated to a larger degree* that the waiting time at the checkout was under 10 minutes (100%) and that the itemized receipts were automatic (93%). Respondents from the Central region mentioned to a lesser degree that their shop accepted more than one payment (30%) and that it issued automatic receipts (60%). The biggest difference between urban and rural respondents – all* rural respondents mentioned that they issued automatic receipts, while urban respondents mentioned to a larger degree accepting multiple forms of payment.

When analysing the differences of data depending on the number of items on sale, the share of those that reported issuing automatic receipts increases as does the size of the interviewed retailer. 91%* of retailers that sell over 1000 items mention that their shop accepts more than one form of payment.

Figure 42.1: Q4.5 – Q4.6. Which of the following applies to this shop?, %

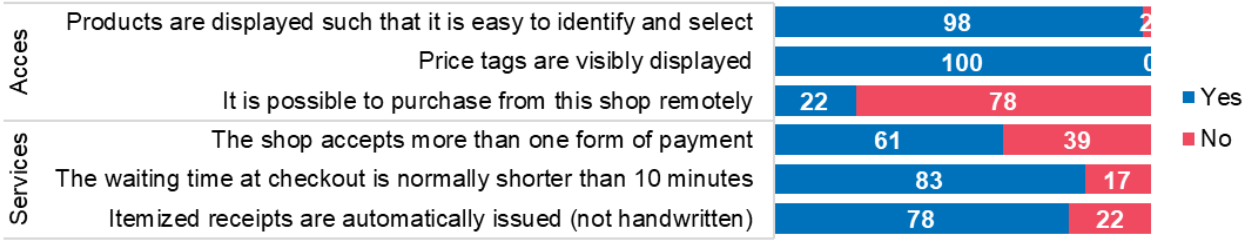


Figure 42.2: Q4.5 – Q4.6. Which of the following applies to this shop?, %

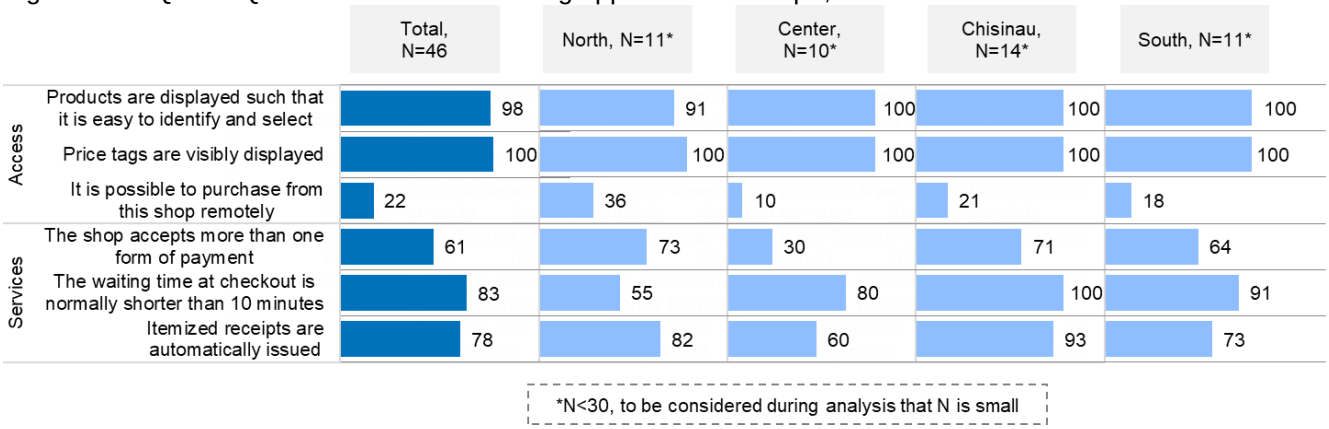


Figure 42.3: Q4.5 – Q4.6. Which of the following applies to this shop?, %

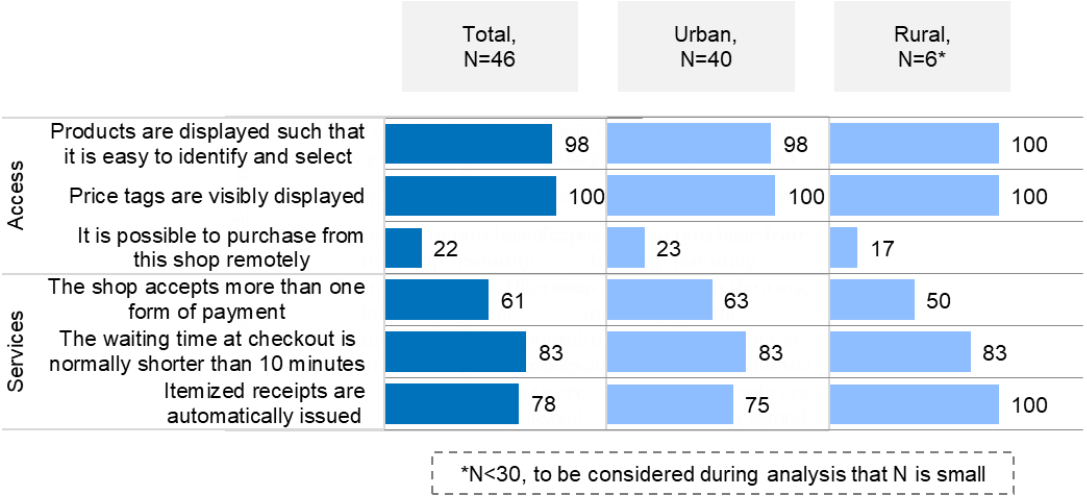
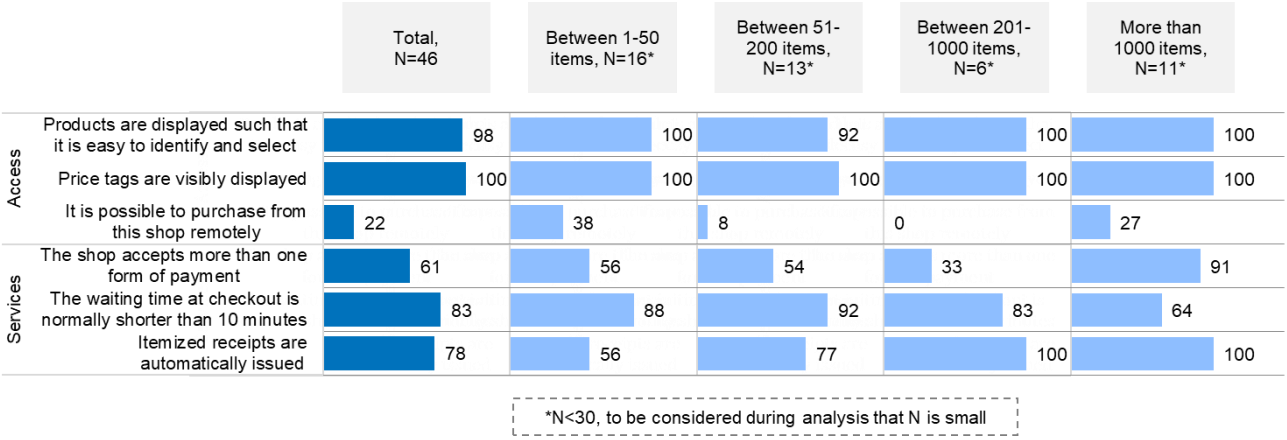


Figure 42.4: Q4.5 – Q4.6. Which of the following applies to this shop?, % disaggregated by number of distinct items on sale



2.4. Quality

Most store representatives, who participated in the research, mention that all goods in labelled containers do not exceed their "best-use-before"/ "use-by" date (57%). In nearly half of the stores that entered the study, fresh/raw animal and dairy products in the shops are stored and displayed in refrigerated units that are on and working (48%). 28% of respondents mentioned that fresh fruits and vegetables in the shops had visible signs of spoilage or bad smells.

Respondents from the Northern and Southern regions indicated to a higher degree* (73%) that the goods in labelled containers do not exceed their due date. 40% of Central region respondents* indicated having some goods in labelled containers that exceed their “best before” date. Around half of respondents from Northern (45%), Central (50%) regions* and rural areas* (50%) mentioned that the fruit and vegetables they sold had signs of spoilage or bad smells.

Figure 43.1: Q4.7 – Q4.9. Quality assessment, %

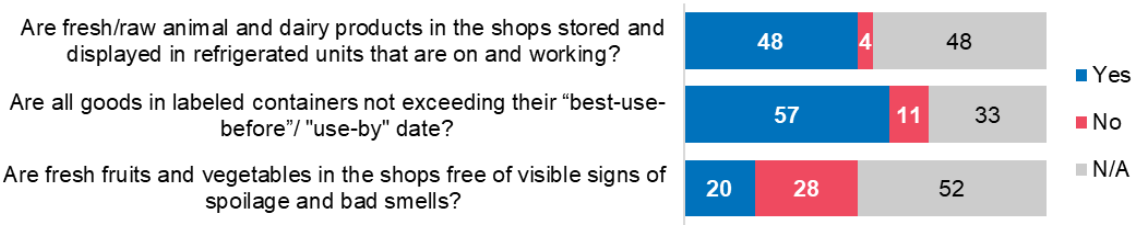


Figure 43.2: Q4.7 – Q4.9. Quality assessment, %

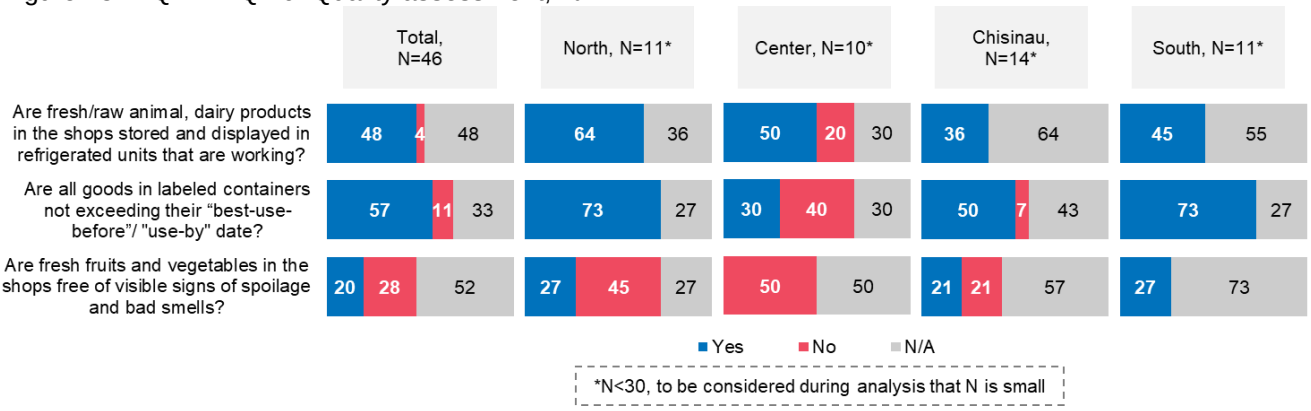
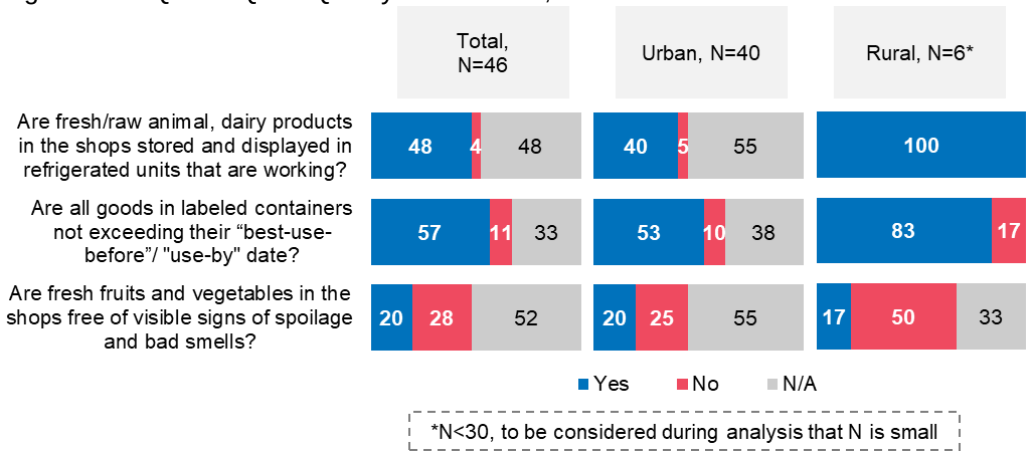


Figure 43.3: Q4.7 – Q4.9. Quality assessment, %



2.5. Access

Most retailers state that there are no issues regarding the access to the stores. At the same time, 17% consider that there are social barriers to access for marginalized groups based on sociodemographic status, this point indicated more so by the respondent from the Southern region*.

Figure 44.1: Q4.10. – Q4.11. Access assessment, %

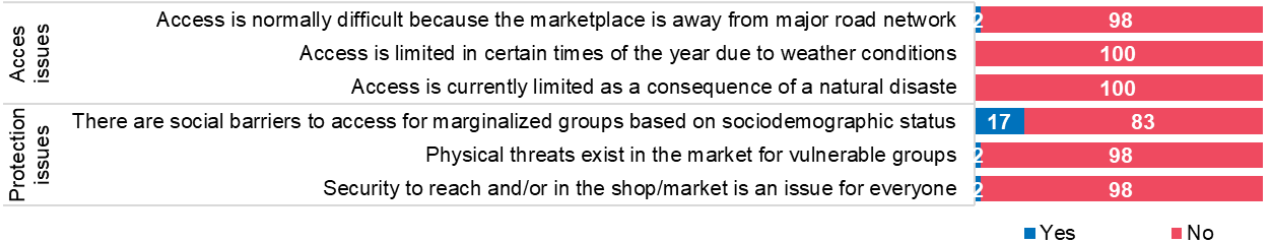


Figure 44.2: Q4.10. – Q4.11. Access assessment, %

		Total, N=46	North, N=11*	Center, N=10*	Chisinau , N=14*	South, N=11*
Acces issues	Access is normally difficult because the marketplace is away from major road network	2	9	0	0	0
	Access is limited in certain times of the year due to weather conditions	0	0	0	0	0
	Access is currently limited as a consequence of a natural disaste	0	0	0	0	0
Protection issues	There are social barriers to access for marginalized groups based on sociodemographic status	17	18	10	0	45
	Physical threats exist in the market for vulnerable groups	2	0	0	0	9
	Security to reach and/or in the shop/market is an issue for everyone	2	9	0	0	0

*N<30, to be considered during analysis that N is small

Figure 44.3: Q4.10. – Q4.11. Access assessment, %

		Total, N=46	Urban, N=40	Rural, N=6*
Acces issues	Access is normally difficult because the marketplace is away from major road network	2	3	0
	Access is limited in certain times of the year due to weather conditions	0	0	0
	Access is currently limited as a consequence of a natural disaste	0	0	0
Protection issues	There are social barriers to access for marginalized groups based on sociodemographic status	17	18	17
	Physical threats exist in the market for vulnerable groups	2	3	0
	Security to reach and/or in the shop/market is an issue for everyone	2	0	17

*N<30, to be considered during analysis that N is small

2.6. Difficulties and expectations (main problems faced)

The majority of respondents mention that the main problems they faced last year and currently are the high cost of gas/electricity to store and transport products (83% last year and 85% this year), decreased demand (61% last year and 59% - this year) and high food prices set by producers/importers (50%).

In terms of differences across regions, Chisinau retailers indicated to a larger degree* that they were currently facing a decreased demand (86%). Respondents from the South* mentioned to a larger degree lacking working capital (45%) as a problem they were facing at the time of the interview. One of the top problems interviewees from the North* had faced last year and this year was an increased demand from the population (55%).

The main two problems urban respondents are currently facing are high cost of gas/fuel/electricity to store and transport products (82%) and increased demand from population (55%). To a larger degree*, rural interviewees specified facing a decreased demand, high food prices set by producers/importers and loss of products.

Figure 45.1: Q5.1. What are the main problems with selling the products that you have faced during the same period of the year?/ Q5.2. What are the main problems with selling the products that you have faced currently?, N=46, %

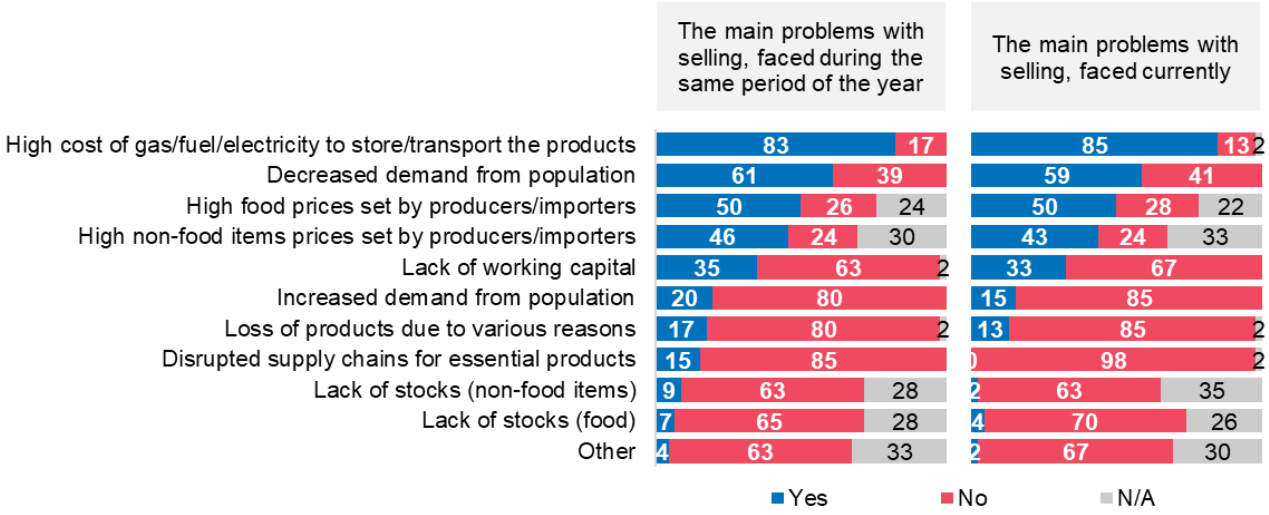


Figure 45.2: Q5.1. What are the main problems with selling the products that you have faced during the same period of the year?/ Q5.2. What are the main problems with selling the products that you have faced currently?, N=46, %

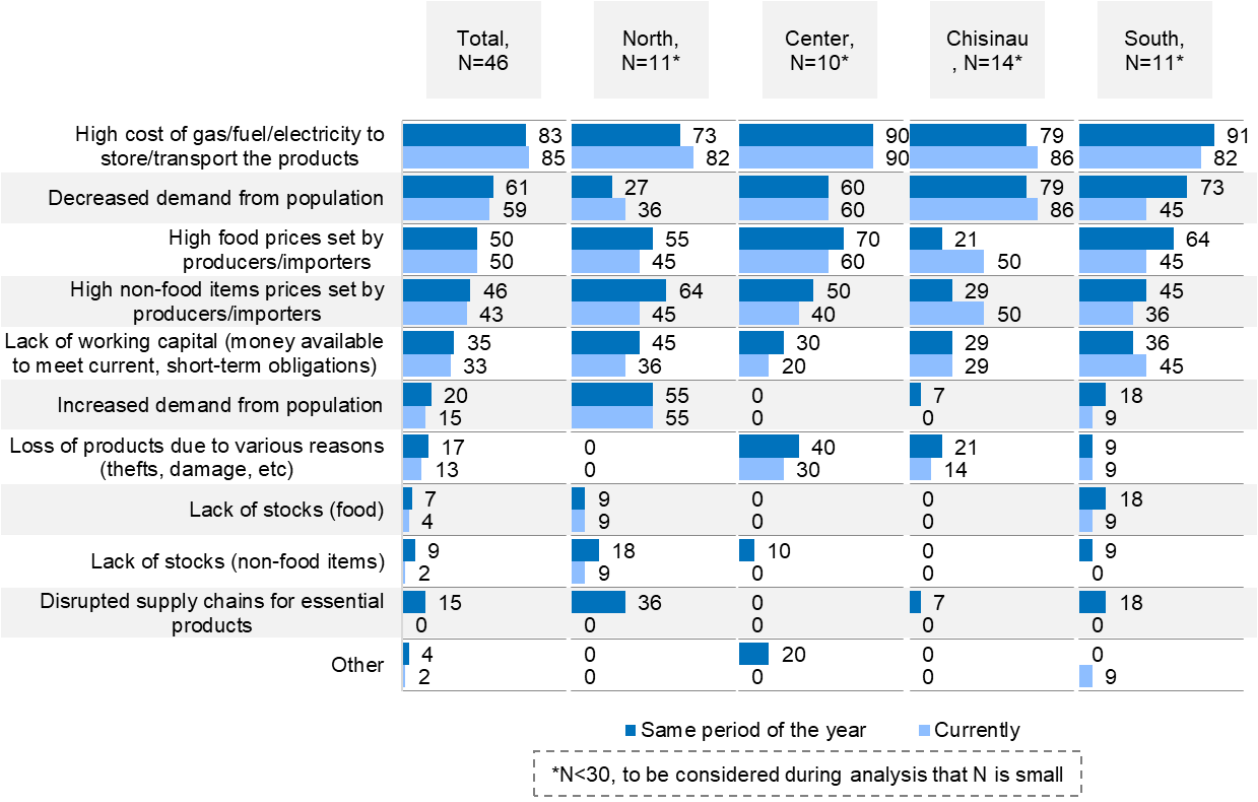
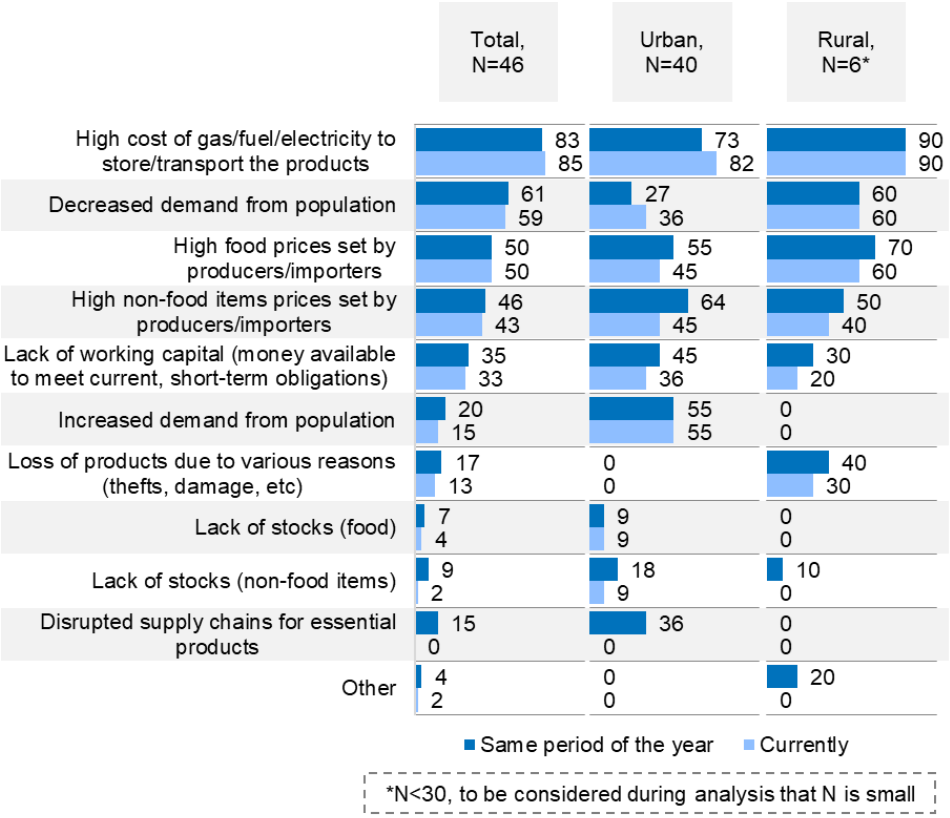


Figure 45.3: Q5.1. What are the main problems with selling the products that you have faced during the same period of the year?/ Q5.2. What are the main problems with selling the products that you have faced currently?, N=46, %



Roughly one-third of the respondents say that they have to sell less quality products, but with a cheaper price in order to cope with their current problems (35%). 24% had to find new suppliers and 17% - have to take loans to cover the current/short-term obligations.

Selling less quality items was a measure implemented by most of retailers interviewed in Chisinau (79%)* and 40% of Central respondents*. About one-third of Northern interviewees* reported taking a loan and finding new suppliers in order to cope with their current problems. No rural respondents* mentioned having found new suppliers or selling less quality items as measures implemented because of their current problems.

Figure 46.1: Q5.3. How do you cope with these problems?, N=46, %

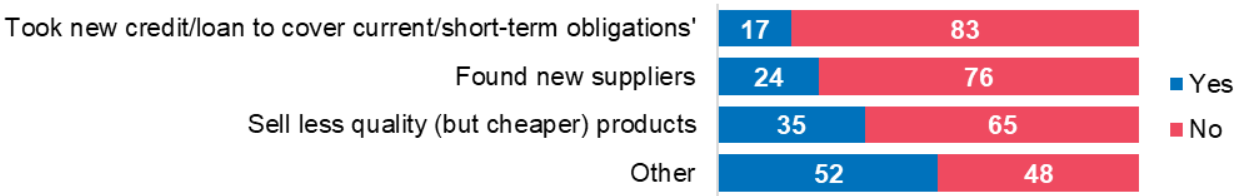


Figure 46.2: Q5.3. How do you cope with these problems?, N=46, %

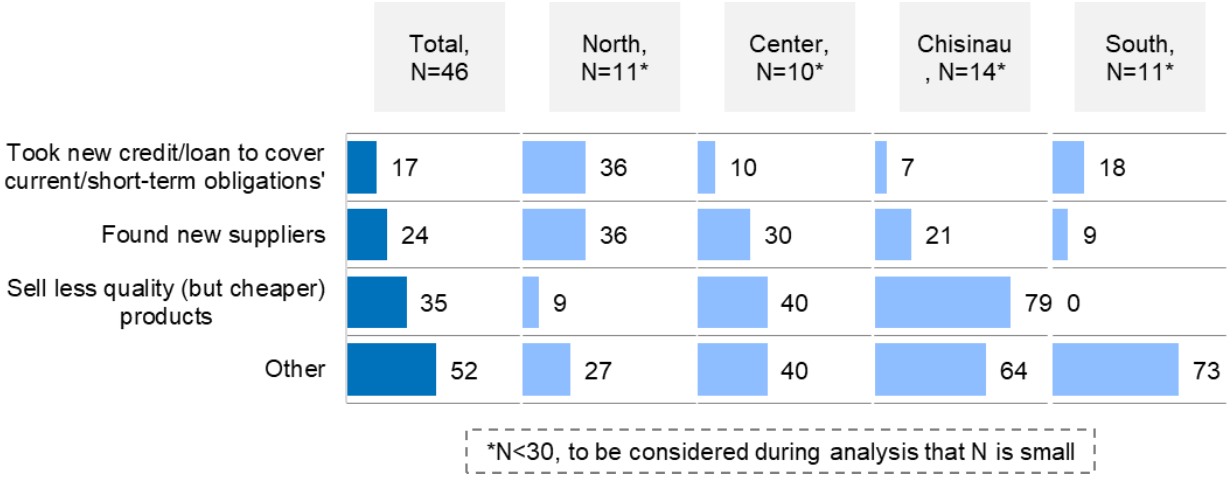
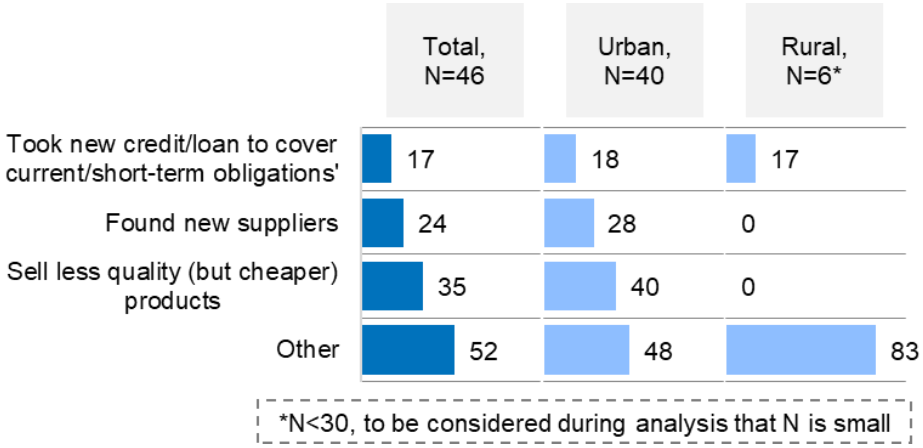


Figure 46.3: Q5.3. How do you cope with these problems?, N=46, %



The top three changes the interviewed retailers expect in the near future because of the war in Ukraine – a rise in prices (75%), reduced purchasing power of buyers (70%), and reduced mobility of buyers (50%). In terms of differences across regions, generally Chisinau respondents mentioned to a larger degree* expecting changes in their work due to the war. Limited availability of cash is expected by 50% of Chisinau and 45% of Northern respondents*. Rural respondents expect to a larger degree* facing a reduced purchasing power of buyers in the near future because of the war in Ukraine.

Figure 47.1: Q5.4. Do you expect any changes in the work of your company in the near future due to the conflict in Ukraine?, N=46, %

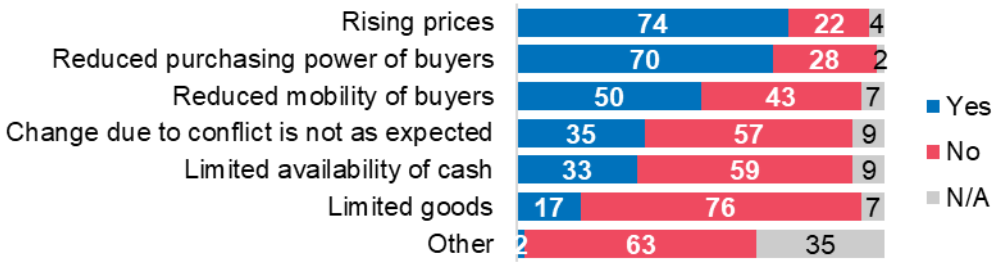


Figure 47.2: Q5.4. Do you expect any changes in the work of your company in the near future due to the conflict in Ukraine?, N=46, %

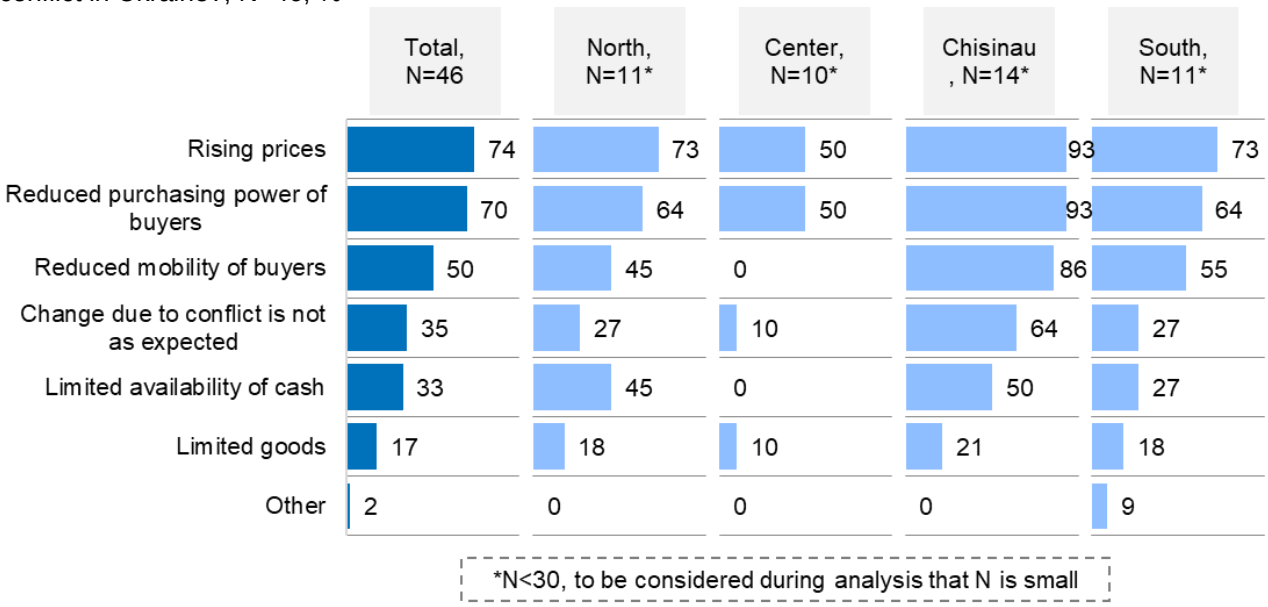
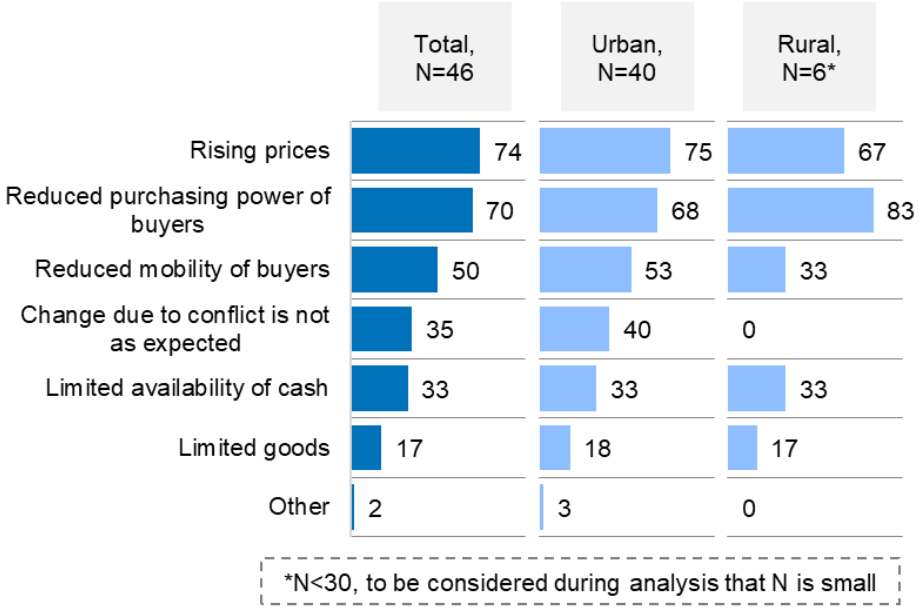


Figure 47.3: Q5.4. Do you expect any changes in the work of your company in the near future due to the conflict in Ukraine?, N=46, %



2.7. Availability of financial service providers

91% of the retailers mention that there is a bank branch with a full range of services in their locality. 9% (all of them in rural areas) say that there aren't any bank branches available in their settlement, but are available in the nearby ones. Similarly to the bank branches, 91% of retailers state that there are fully functional ATMs in their locality that (91%). This was indicated to a lesser degree by respondents from rural locations*.

Figure 48.1: Q6.1. Are there bank branches in your locality and are they currently open?, N=46, %

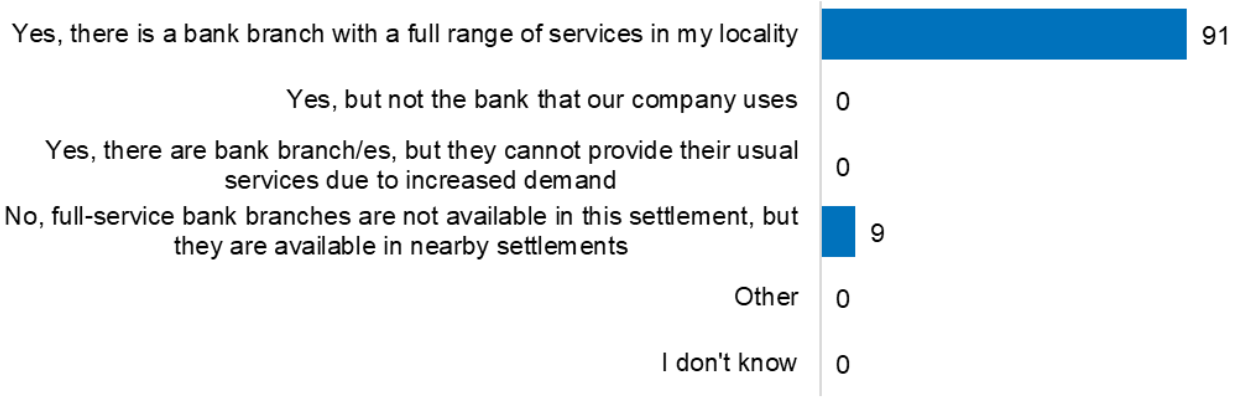


Figure 48.2: Q6.1. Are there bank branches in your locality and are they currently open?, N=46, %

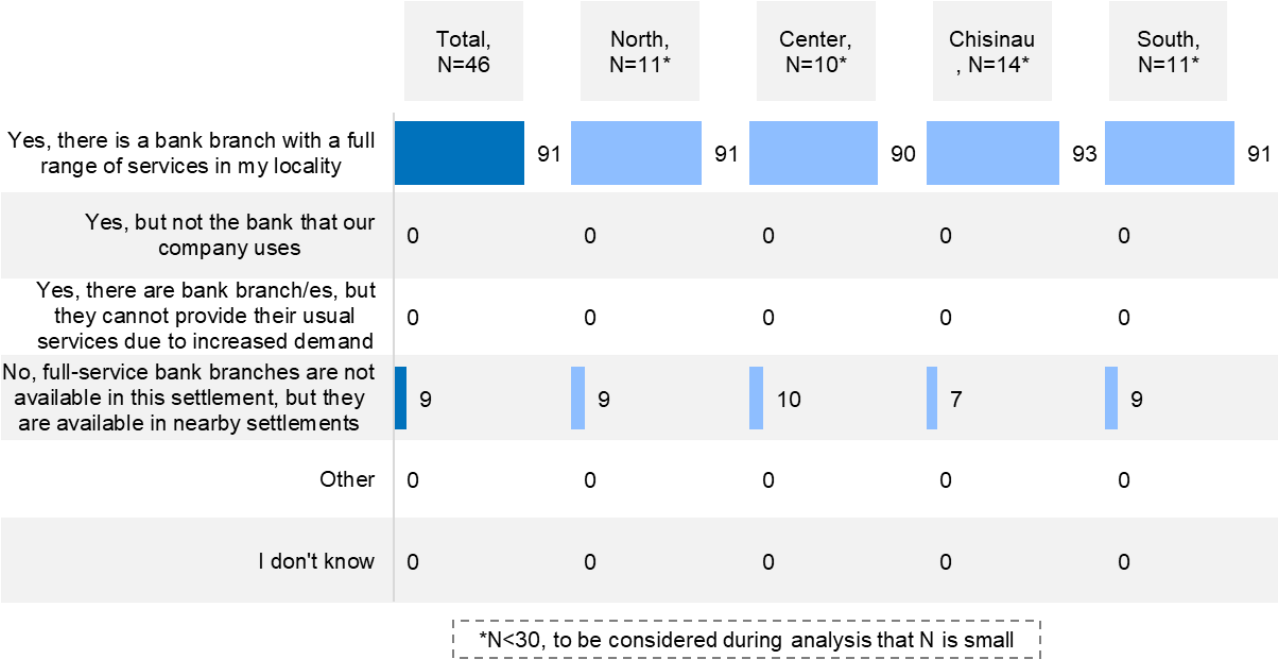


Figure 48.3: Q6.1. Are there bank branches in your locality and are they currently open?, N=46, %

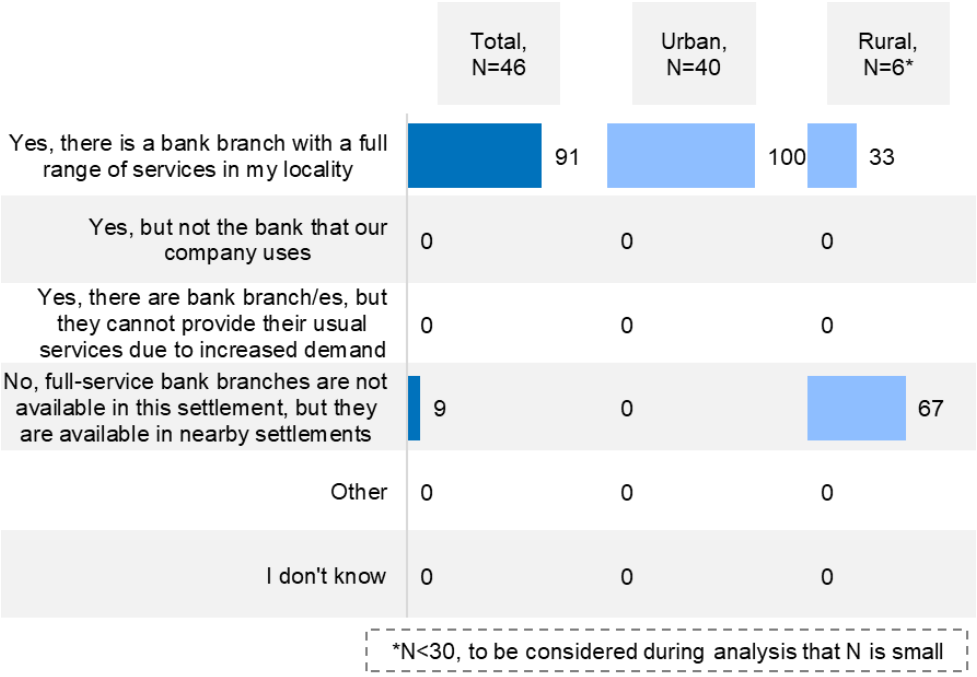


Figure 49.1: Q6.2. Are there any ATMs in your locality and are they working?, N=46, %

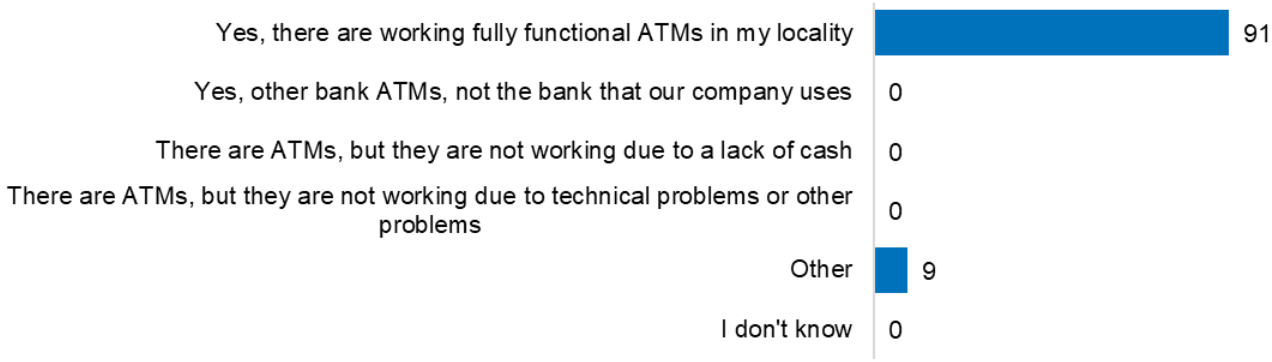


Figure 49.2: Q6.2. Are there any ATMs in your locality and are they working?, N=46, %

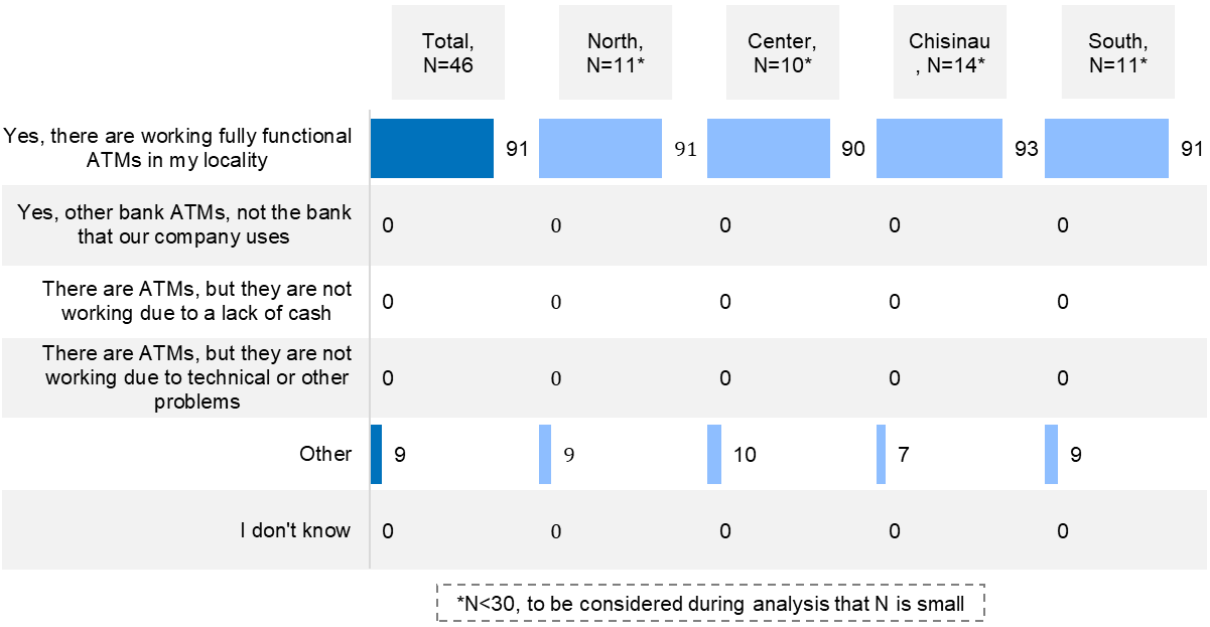
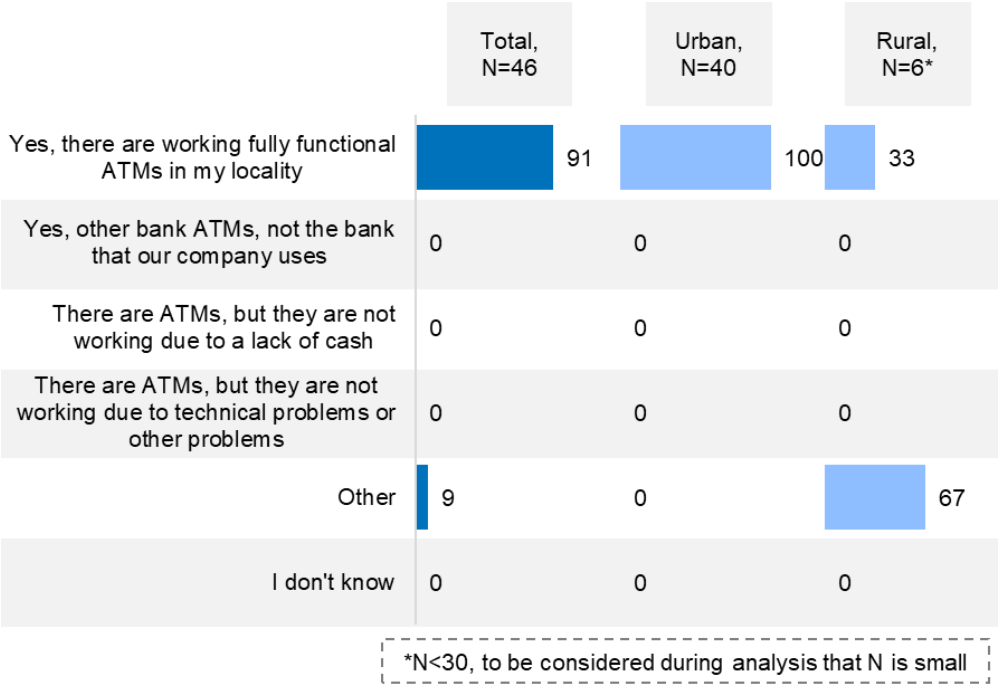


Figure 49.3: Q6.2. Are there any ATMs in your locality and are they working?, N=46, %



Most interviewed retailers say that the nearest bank (74%) and ATM (76%) are located at a distance of less than 1 km. Respondents from the Northern region and rural areas reported bigger* distances to the nearest bank and ATM, compared to other regions.

Figure 50.1: Q6.3 – Q6.4. How far away is the nearest bank located? How far away is the nearest ATM located?, N=46, %

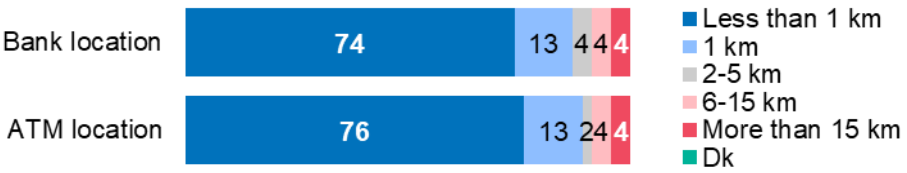


Figure 50.2: Q6.3 – Q6.4. How far away is the nearest bank located? How far away is the nearest ATM located?, N=46, %

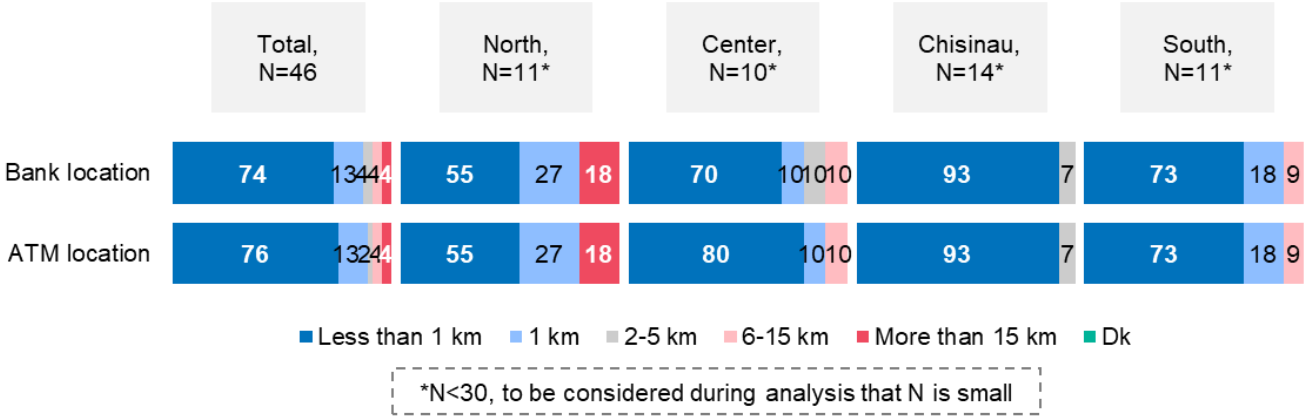
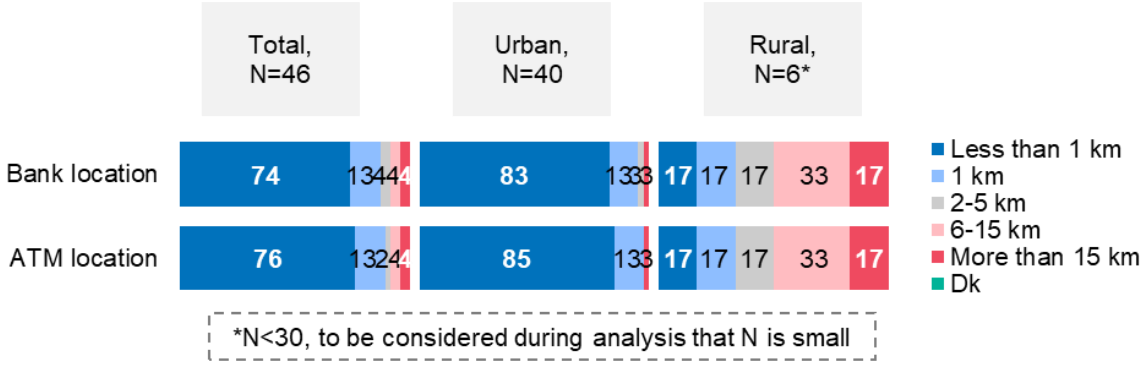


Figure 50.3: Q6.3 – Q6.4. How far away is the nearest bank located? How far away is the nearest ATM located?, N=46, %



Similar to the customer respondents, the majority of retailer respondents said that the listed financial services mentioned are available in their locality (96% - Posta Moldovei, 91% - Western Union and 80% - Money Gram). Compared to other regions, respondents from the Southern (91%) and Central (90%) regions* mentioned to a larger degree that MoneyGram was available in their settlement. Urban respondents indicated to a larger degree having Western Union and MoneyGram in their settlements, compared to the rural area respondents*.

Figure 51.1: Q6.5. Are other financial services available in your locality (national and international financial transfers)?, N=46, %

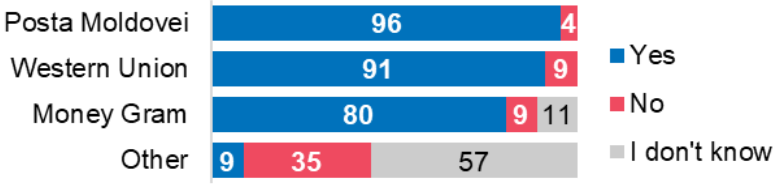


Figure 51.2: Q6.5. Are other financial services available in your locality (national and international financial transfers)?, N=46, %

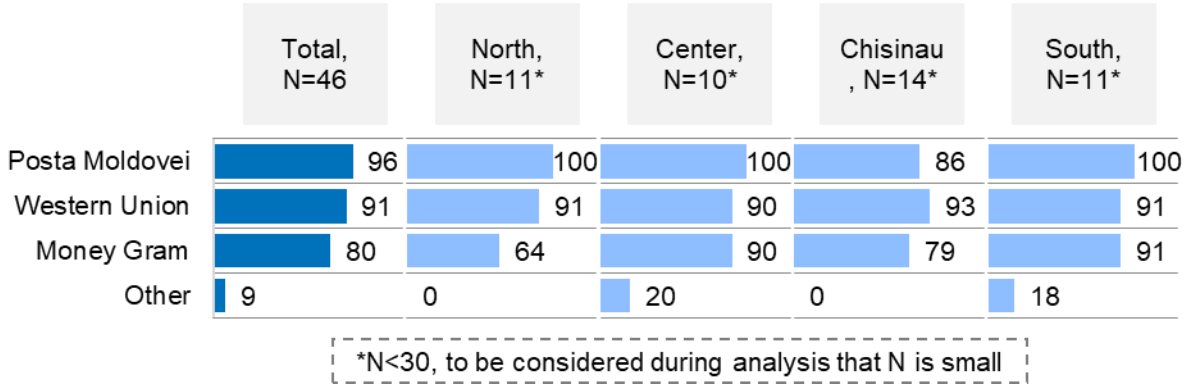
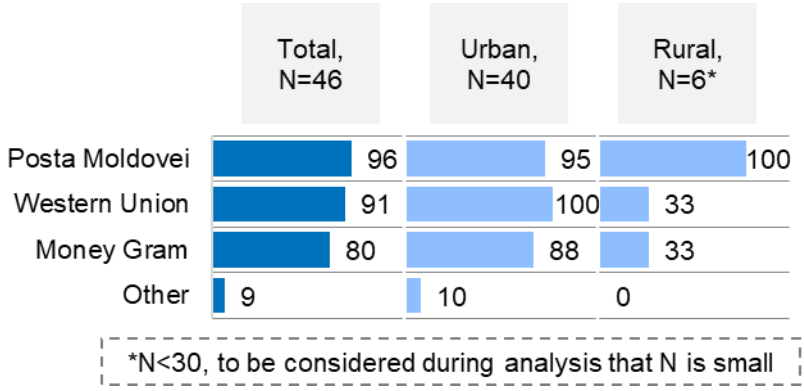


Figure 51.3: Q6.5. Are other financial services available in your locality (national and international financial transfers)?, N=46, %



Most of the retailers mention that the financial service providers work every day and regularly provide all their financial services (96%). Similar opinions are mentioned across different regions and areas.

Figure 52.1: Q6.6. The financial service providers work…., N=46, %

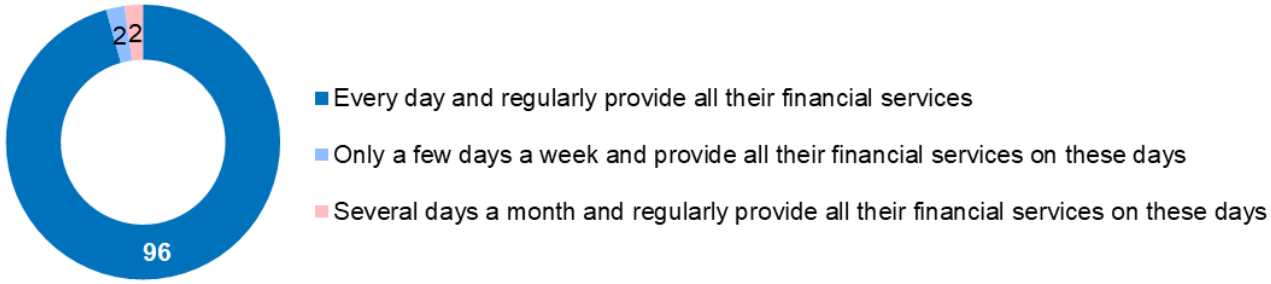


Figure 52.2: Q6.6. The financial service providers work…., N=46, %

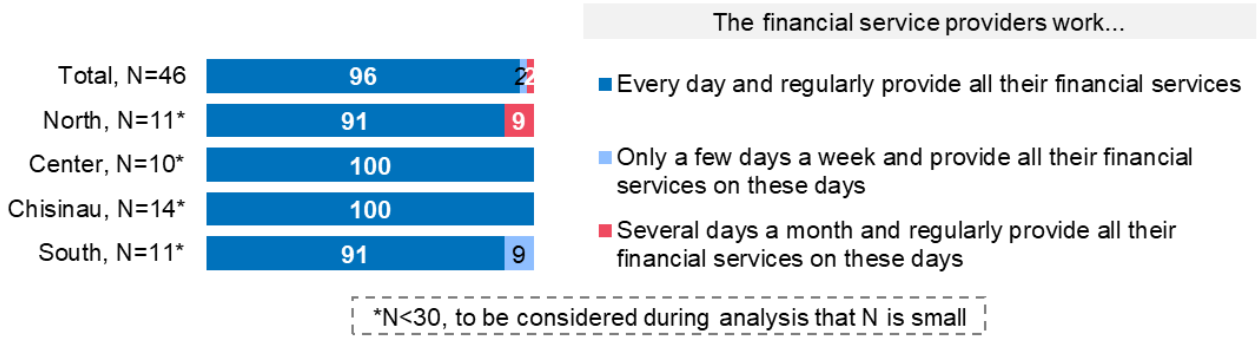
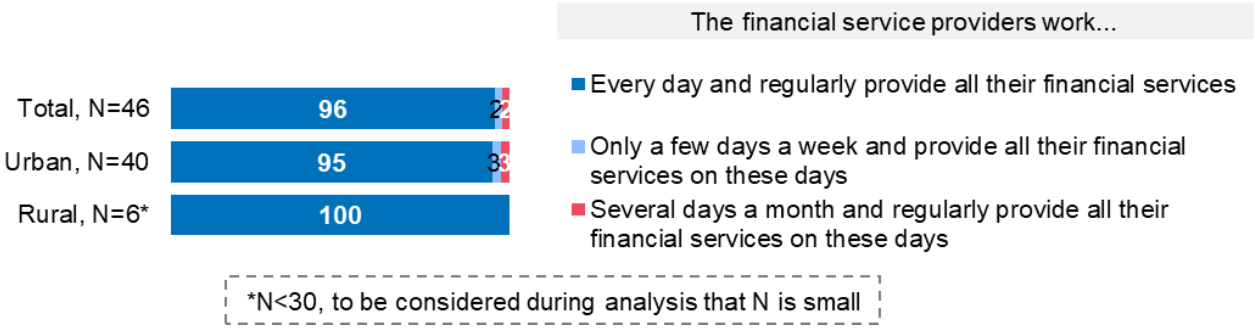


Figure 52.3: Q6.6. The financial service providers work…., N=46, %



Three quarters of the retailers mentioned that the nearest financial service provider is located in less than 1 km (74%), 15% say that the service provider is located at a distance of 1 km. Chisinau retailers mentioned to a higher degree* having a financial service provider at a distance of under 1 km. Respondents from the North and rural areas indicated to a higher degree that the financial service providers are further away.

Figure 53.1: Q6.7. How far away is the nearest financial service provider located?, N=46, %

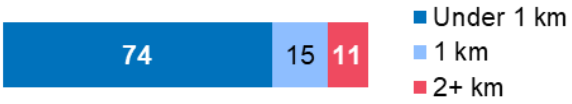


Figure 53.2: Q6.7. How far away is the nearest financial service provider located?, N=46, %

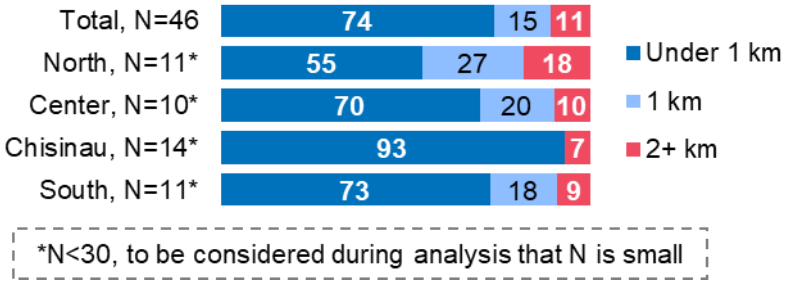
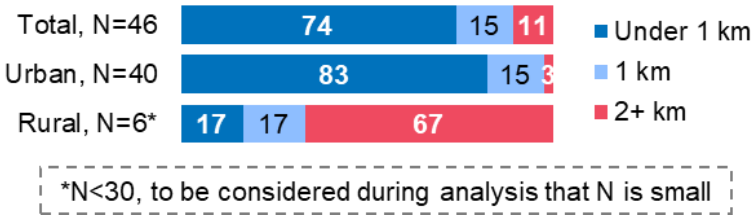


Figure 53.3: Q6.7. How far away is the nearest financial service provider located?, N=46, %



2.8. Payment methods

All of the interviewed retailers accept cash in their stores, 43% accept credit cards and 35% - mobile applications. 2% of respondents indicated accepting UN/NGO vouchers at their store. In terms of regional differences, respondents from the Northern (64%) and Southern (55%) regions* mentioned to a higher degree accepting credit cards as payment method in their store. Mobile applications appear to be accepted by a small share* of Central interviewees, compared to other regions. Of retailers* that sell over 1000 distinct items in their shop, all accept cash and cards, and half – accept mobile applications and debit cards as payment methods.

Figure 54.1: Q7.1. Is this payment method currently accepted in your store?, N=46, %

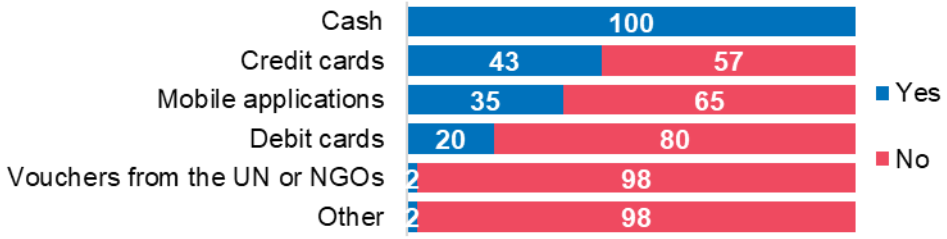


Figure 54.2: Q7.1. Is this payment method currently accepted in your store?, N=46, %

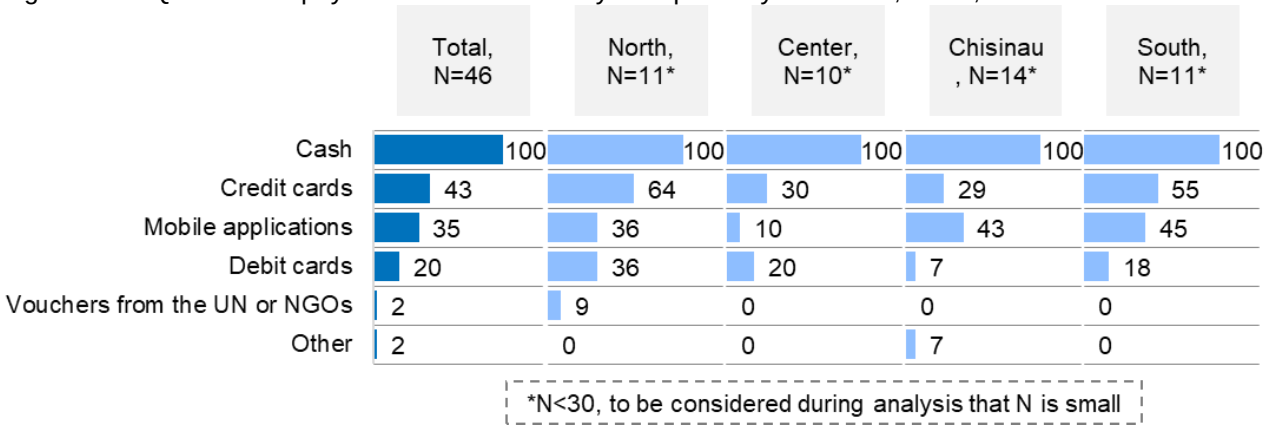


Figure 54.3: Q7.1. Is this payment method currently accepted in your store?, N=46, %

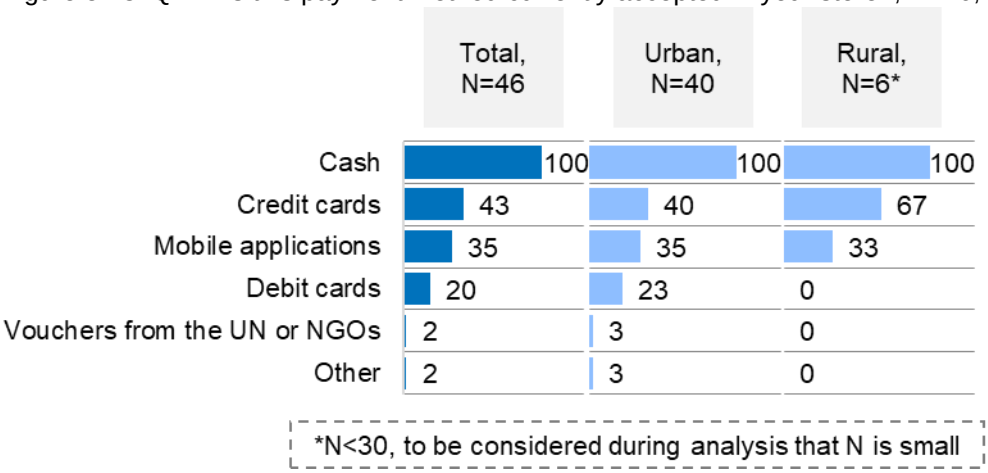
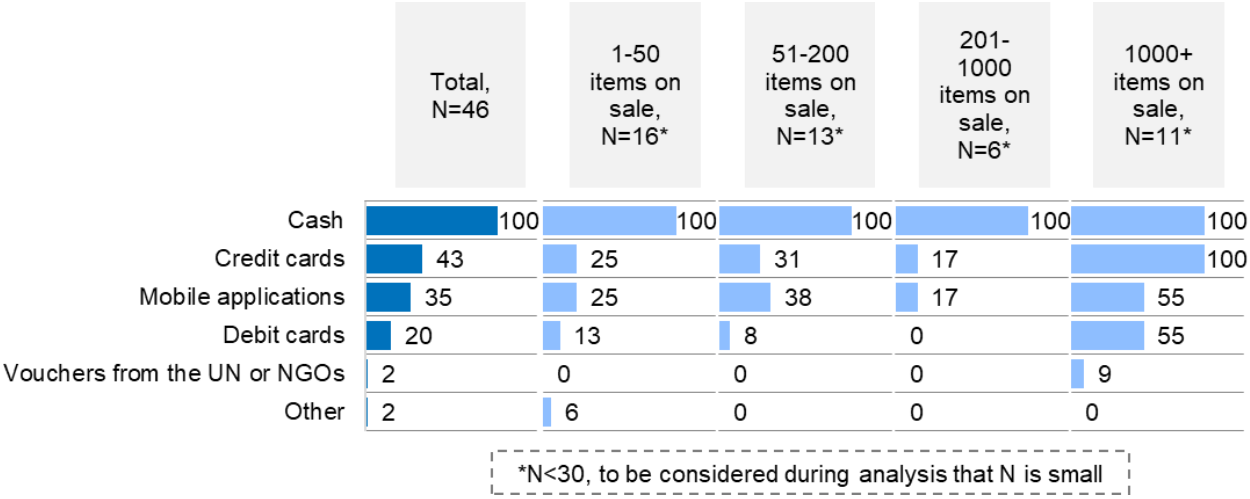


Figure 54.4: Q7.1. Is this payment method currently accepted in your store?, N=46, % disaggregated by number of distinct items on sale



Cash is the payment method for which most respondents reported no restrictions of use in their store (93%). 28% of retailers say that there are some restrictions on using mobile applications payment method and 26% - on vouchers from the UN or NGOs. Overall, most retailers stated that markups did not apply to customers on any of the payment methods.

Compared to other regions, most* respondents the Central region mention there are restrictions on using all payment methods that are not cash. On the other hand, Chisinau interviewees reported no restrictions on using any payment method. It appears that the smaller retailers (that sell under 200 distinct items) have more restrictions on payment methods.

Figure 55.1: Q7.2 Are there any restrictions on using…, N=46, %

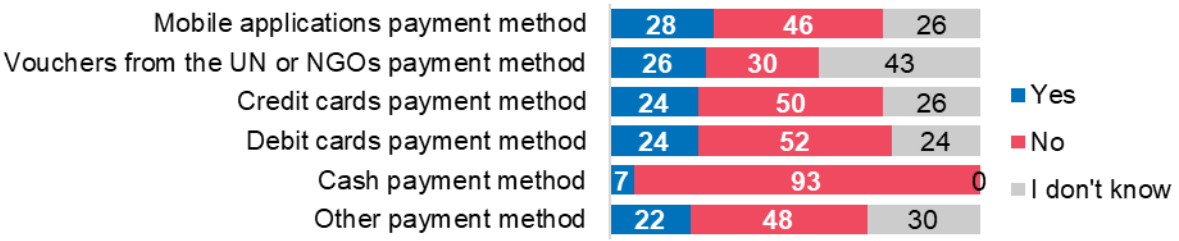


Figure 55.2: Q7.2 Are there any restrictions on using…, N=46, % (yes)

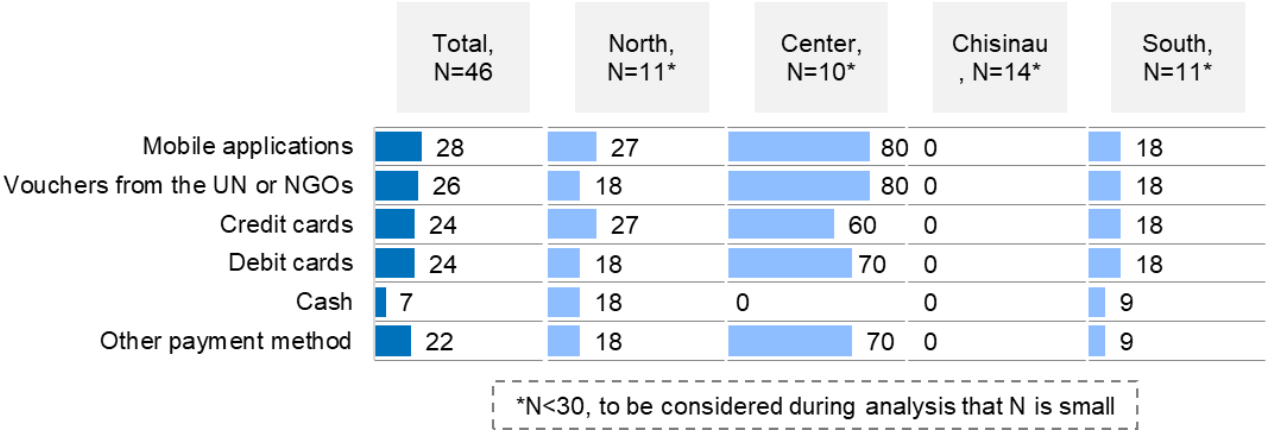


Figure 55.3: Q7.2 Are there any restrictions on using…, N=46, % (yes)

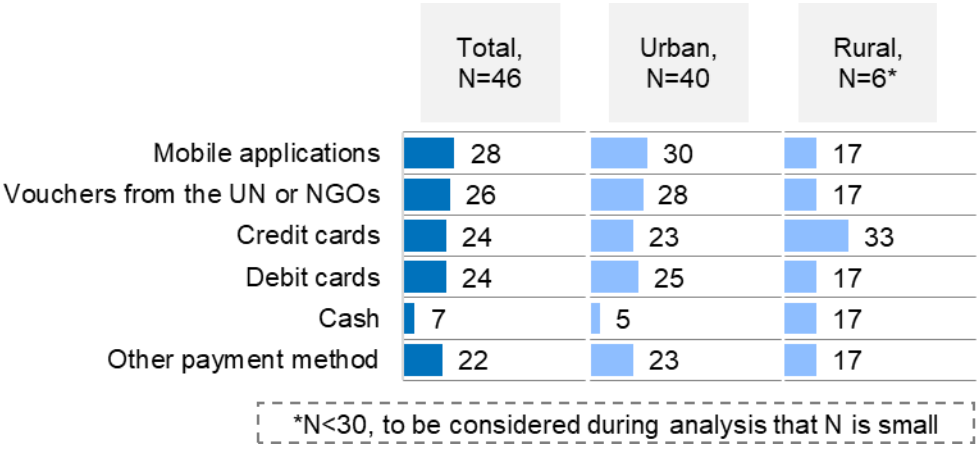


Figure 55.4: Q7.2 Are there any restrictions on using…, N=46, % (yes), disaggregated by number of distinct items on sale

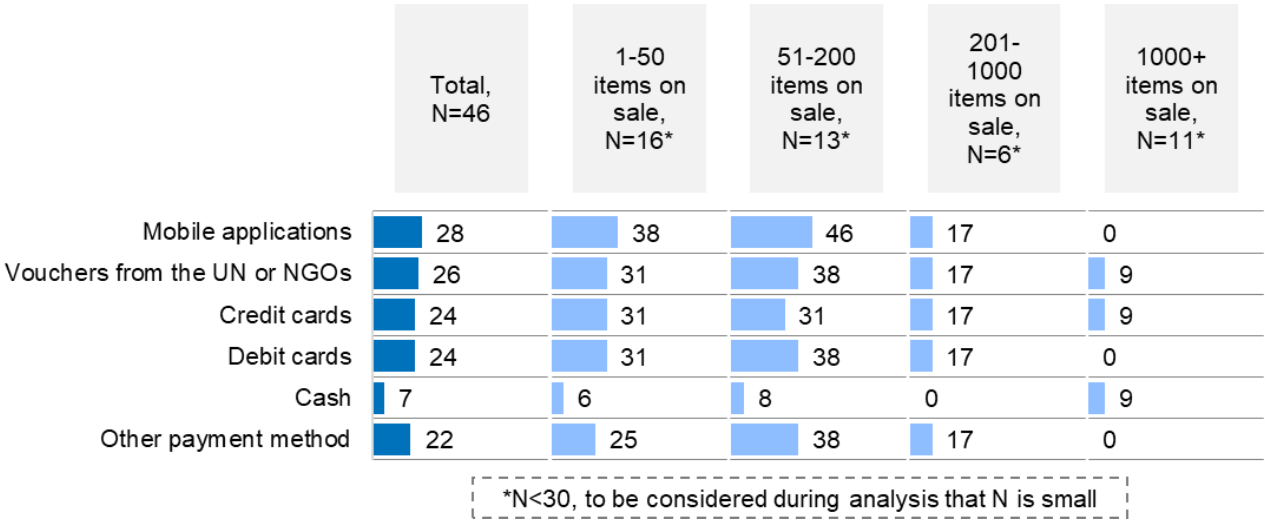
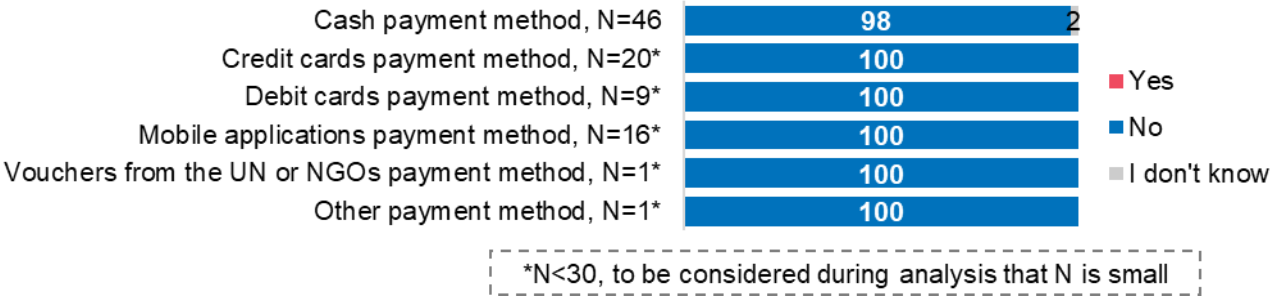


Figure 56: Q7.3 . Does the markup apply to buyers using…, N=46, %



9% of the surveyed stores allow the customers to withdraw cash from their account using credit cards. Among respondents from the South and rural areas, and those that sell 1-50 items or 201-1000 items in their stores, none* have the option for customers to withdraw cash using credit cards.

Figure 57.1: Q7.4. Does this store allow customers to use credit cards to withdraw cash from their account?, %

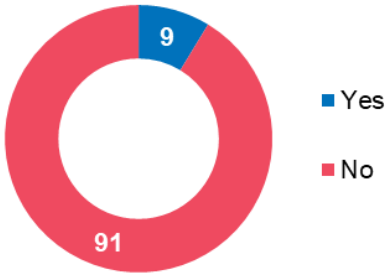


Figure 57.2: Q7.4. Does this store allow customers to use credit cards to withdraw cash from their account?, %

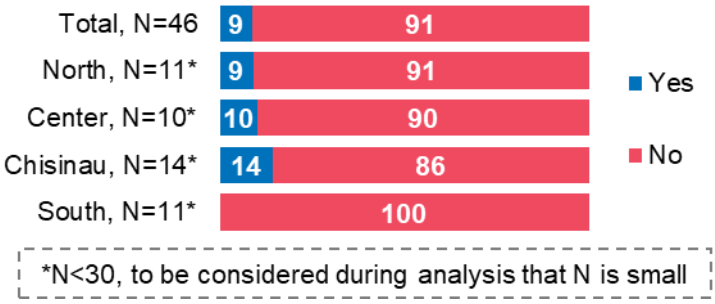


Figure 57.3: Q7.4. Does this store allow customers to use credit cards to withdraw cash from their account?, %

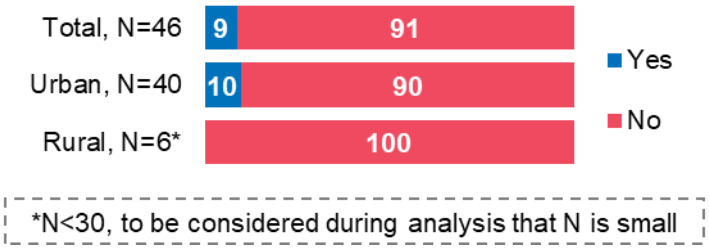
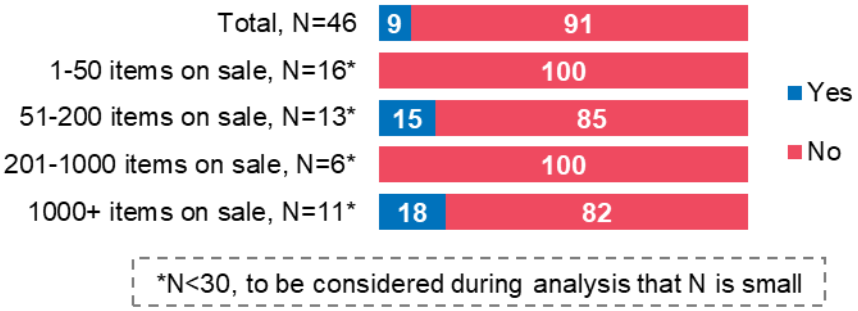


Figure 57.4: Q7.4. Does this store allow customers to use credit cards to withdraw cash from their account?, % disaggregated by number of distinct items on sale



CHAPTER III: MARKET ASSESSMENT – KEY INFORMANT INTERVIEWS

The analysis presented below is for the data collected during the Key Informant Interviews conducted with humanitarian actors working in the cash sector. The respondents include both Cash Working Group partners and organizations that indicated they have provided or facilitated cash assistance.

The information provided below reflects the statements made by Cash Working Group partners and organizations that indicated they have provided or facilitated cash assistance. It is important to note that this information does not constitute an analysis or interpretation by the researcher.

3.1. Beneficiaries' consumption and mobility patterns

Several organizations conducted post-distribution studies, including asking the beneficiaries for their expenditures' receipts. According to the respondents, different spending patterns of cash assistance were registered, including spending cash assistance/vouchers on:

- Accommodation;
- Utilities, especially in the winter season;
- Food;
- Hygiene products;
- Health care (medicine and medical services);
- Clothes;
- Fuel;
- Appliances (washing machine, boiler, etc.).

Data collected by one organisation indicated that the majority of the received cash assistance was primarily spent on (1) food, (2) utilities, and (3) health care. Other ideas about the spending patterns stand that more than half of the cash received through the program was spent on utilities ("I think over 50% [is] going to utilities and then, whatever they have leftover is used as discretionary [...] for food, or clothing, or whatever their needs are"). Interviewed representatives of organisations have noticed that, for purchasing food and non-food items, refugees go to supermarkets, open markets, and smaller markets/shops.

Patterns in consumption and provided assistance

Organizations conducting the cash program have observed a change in consumption patterns among refugees since the beginning of the crisis. Initially, the refugees' primary concerns were centred around spending on accommodation and food. However, after a few months, there was a shift in spending behaviour, with refugees increasingly allocating more funds to cover medical services ("in the beginning, medical needs were somehow neglected [by refugees]"). Additionally, at the program's onset, refugees displayed selectivity when choosing food items from the provided packages, taking only what suited their preferences and leaving out certain items like rice and buckwheat. Furthermore, organizations reported observing seasonal changes in spending patterns, particularly during the winter season:

- Higher utilities;
- Warm clothes;
- Fuel for heating;
- Medical services;
- Increased sugar and sweets consumption.

Among the reason for changing the spending patterns it was mentioned the increase in market prices: "the amount [of the cash assistance] has remained the same, but the prices have increased; in this sense, the beneficiaries must limit themselves and prioritize the needs".

Organisations themselves adapted their assistance patterns for the provided assistance over time: for example, in the beginning, the focus was on purchasing warm clothes, blankets and food while at the moment, they are more focused on providing psychological services and entertainment for children, addressing the evolving needs of the beneficiaries.

Covering the needs of the beneficiaries

The cash assistance offered by the organization is generally perceived as insufficient to meet the needs of the refugee beneficiaries, or only covers needs for a limited and short period. The main reasons given for this opinion were:

- The economic crisis and increased inflation;
- The assistance was calculated based on the minimum consumption basket, which is insufficient to meet the needs of the beneficiaries;
- Delays in the disbursement of the cash assistance sometimes results in beneficiaries being unable to address immediate essential needs.

The research finds that the interviewees believed that not all the refugees' needs are adequately addressed by the assistance provided, primarily due to the focus of humanitarian projects focus on particular groups, and some groups that are "less vulnerable" receive less assistance, which often leaves their needs unmet. Organisations participating in the interviews noted that there was more support in the form of food and hygiene items packages during the early stages of the cash programme. The assistance provided does not fully meet the needs of all refugees as it tends to prioritize specific groups, resulting in less assistance for those considered "less vulnerable," which often leaves their needs unmet. The main coping mechanism of beneficiaries of cash assistance to manage to meet basic needs are buying less preferred/expensive food, borrowing food, and reducing portion size.

The study identifies several goods and services that the refugees need but reportedly cannot cover from the existing cash assistance are:

- Utilities;
- General medical services (non-urgent medical care), particularly for people with disabilities;
- Repairs and maintenance of the dwelling;
- Fuel;
- Household appliances;
- Furniture;
- Clothes and shoes ("people can get food packages and vouchers, but organizations are not able to order individualized shoe sizes");
- Childcare;
- Renting, in Chisinau particularly;
- Hygiene products for people with disabilities (pads, personal hygiene, detergents, etc.);
- Children's food.

However, some respondents believed that the current assistance was sufficient ("[the assistance] is efficient to cover what it is intended to cover"), based on the organizations' monitoring of the market. The data tracked by one organization show that the assistance was really helpful to cover beneficiaries' needs:

- Every 3-4 households hosting refugees receiving cash assistance stands that they could not continue hosting refugees if assistance was not provided;
- If the cash transfers were not made, the vulnerable beneficiaries would live below the minimum subsistence level established by the government.

3.2. Overall price levels in the regions

It was mentioned that the prices for almost all goods and services have increased since March 2022, with most increases in prices for utilities, food, hygiene items, and accommodation. It was noticed that prices for some products, such as sunflower oil, have decreased since the beginning of last year.

A difficulty related to the increased prices was that the assistance did not have the same purchasing power ("less value for money") by the time it was received by the beneficiaries, compared to when it was set up ("from the moment of establishing the amount until reaching the destination to the beneficiaries, the voucher no longer represented the same financial value and, respectively, could not cover basic needs").

Some organisations were able to increase the sum of cash assistance, while others could not change the set amount. One of the barriers was the lack of market analysis up to that point, which could be used as a basis for increasing.

Some organisations attract additional financial resources in order to maintain the same number of beneficiaries, offering at the same time the same value of cash assistance as previously. One person said that the involvement of the government is necessary for their organization to be able to maintain the same level of assistance offered to the beneficiaries.

One respondent reported that following the increased costs of food, the amount allocated for the delivery of food to RACs was increased by the organization. Another respondent believed that organizations increased the financial assistance once the prices increased ("organizations that help refugees financially have certainly self-adjusted and increased the amounts").

Availability of goods and services on the market

Some did not see any barriers to accessing products for any refugee category. At the same time, others think that goods outside of Chisinau are less diverse and less available. Refugees in Chisinau and larger towns reportedly enjoy better access to various services, compared to refugees living in smaller settlements. Respondents mostly believe that the availability of goods was consistent in the regions, in part because some were purchased in Chisinau and then distributed to the regions.

Generally, in case of an increased number of beneficiaries, the respondents believe that the currently available goods and services on the market would be sufficient to cover the increased demand, except for accommodation for rent, which was mentioned as a service that would not be able to cope with increased demand. There were concerns regarding the Moldovan government not being able to cope with an increased number of beneficiaries, due to a lack of human resources in social assistance, lack of financial resources and mismanagement of funds.

3.3. Specific barriers to access certain markets

In *access to markets and goods*, the following barriers were mentioned by respondents:

- Lack of economic capacity: the problem in access to goods and services on the market is not related to accessibility, but affordability;
- Lack of regulatory factors on the market (e.g. lack of an effective consumer protection mechanism);
- Limited access for the refugees in rural areas: lack of bigger supermarkets, pharmacies, higher prices for products, fewer organizations that provide assistance (such as Moldova film, Patria Lukoil);
- Limited access for the beneficiaries with low-income households;
- Limited access for the refugees with limited mobility: beneficiaries with disabilities have requested an increase in assistance due to increased costs of medication;
- Places that do not offer receipts in areas where refugees are making purchases;

- Language barrier (for those living on the Right Bank);
- Negative attitude of some Moldovan citizens towards refugees/discrimination against Russian citizens that were living in Ukraine;
- Far away located markets from places where elderly or extremely vulnerable beneficiaries are living;
- Lack of some Ukrainian products on the Moldovan market;
- Different regulations under which organisations offering hot meals are functioning and difficulties in accessing stable financing and food supply for them;
- Lack of diversity in food and hygiene items, and catering offered: substituting food and hygiene items packages for vouchers would be more convenient to the refugees.

In order to facilitate access to the markets and goods, organisations purchase vouchers for beneficiaries from groceries shops and non-food shops that are spread "everywhere" in Moldova (e.g., Linella, Azart). Also, according to representatives of the organizations, their employees provide support to individuals facing barriers (e.g., lack of ramps) due to mobility issues when visiting markets or they take responsibility for delivering packages containing essential goods directly to the beneficiaries.

In *access to health services*, the following barriers were mentioned:

- Higher costs of medicine, compared to the costs of medicine in Ukraine;
- Lack of specialized doctors in regions other than Chisinau and Balti;
- Unfriendly attitude of doctors in the public health system;
- Difficulties related to accessing rehabilitation and other medical services particularly for people with disabilities, due to the availability of the services only in the capital city;
- Difficulty in affording specialized care, due to some specialist doctors working only in private clinics;
- Lack of some medicines for chronic conditions in Moldova, which creates difficulties such as the need to visit a doctor for a recommended substitute and finding the medicine in the pharmacies;
- Long time waiting for setting up appointments;
- Moldovan legislation restricted access to medical services for refugees without the temporary protection status, limiting them to emergency medical care only;
- Inability to buy insulin for refugees;
- Disability degree established in Ukraine is not recognized by the Moldovan system;
- Difficulty in obtaining access to registering at a family doctor.
- Despite these challenges, some respondents believed that the access to medical services was somewhat accessible or as the one Moldovans had access to, and that it was sufficient.

In *access to education,* the following barriers were mentioned:

- Children’s integration in Moldovan schools due to language or cultural barriers. It is easier for refugee students that live on the Left Bank to be integrated into schools, due to curriculum similarities. Also, children in rural areas had integrated more easily into the education system due to a smaller community;
- Lack of filled capacity of the nurseries;
- Lack of devices to attend online learning (tablet, smartphone);
- The requirements to provide medical records (vaccination scheme) that refugees do not currently have access to such documentation;
- The educational system in Moldova is not flexible: the law requires parents to register for temporary protection status in order for children to benefit from education services. Refugees are unsure about obtaining temporary protection status because they might wish to return to Ukraine or travel to the European Union. Refugees mostly use local kindergartens, rather than schools, since school-aged children often study online at their Ukrainian schools.

To address these barriers and facilitate the learning process for refugee children, organizations provided technical support for online schooling in Ukraine, after-school spaces and kindergartens for children. Additionally, it was observed that education and health services became more difficult to access after the refugee crisis started, due to limited human capacity.

In *access to rental services,* the following barriers were mentioned:

- Limited financial resources to pay for rent and impossibility to afford rent with only the provided cash assistance ("2200 MDL is not going to pay for rent anywhere in Moldova"). It was stated that refugees who have rented did so using their savings or the support of family members. Some refugee families opted to share rental accommodation in order to reduce costs. Some women refugees have been expose to live with local men, leading to instance of domestic and gender-based violence;
- High costs for rent: landlords may increase the rent price once they find out that the inquirer. However, refugees living in rural areas usually rent for free;
- Reluctance of some landlords to lend to refugees due to political views or negative experiences in the past: ("after experiences in Chisinau when [refugees] left a mess, or damaged something, our Moldovans got angry with the Ukrainians");
- Lack of accessibility in RACs and many rental houses for people with limited mobility. An accessibility assessment conducted in RACs in the last month showed that few RACs are accessible to people with limited mobility;
- Houses in a poor state of maintenance and repair in which refugees are living;
- Reduced number of available rentals, which causes difficulties in finding suitable accommodations;
- Insufficient budget for RACs to host refugees. The RAC in Ungheni was mentioned.

In *access to psychological services,* the following barriers were mentioned:

- Lack of mental health culture that leads to not asking for counselling ("few of [refugees] are receptive to [psychological] services and they are reluctant [to participate], just like us Moldovans").
- Lack of continuity and case management for psychological services offered: there should be a mechanism for collecting data and following up with those that received psychological assistance;
- Insufficient preparedness of some psychologists in helping refugees: some refugees had used the services offered by psychologists from Chisinau visiting the RAC, but were dissatisfied with them ("from discussions with the beneficiaries of the RAC [...], they no longer agree to participate in meetings [with the psychologist], because they do not see anything beneficial");
- High costs for covering these services;
- Insufficient psychological support for children.

On the other hand, psychological support is considered easily available at request ("[the refugees] need to ask for [psychological support] services or make an appointment"). More than that, beneficiaries reportedly were satisfied with the course on Mellow Parenting organized by an NGO.

In *access to transportation services,* the following barriers were mentioned:

- Limited transport in rural areas;
- Lack of transport friendly with people with limited mobility;
- Costs of transportation;
- Inconvenient schedules for transport to rural areas, with some routes operating only until 2 pm.

However, organisations have taken measures to facilitate access to border transportation services for vulnerable refugees (‘people who are not independent or who are ill`).

In *access to job opportunities,* the following barriers were mentioned:

- Low salaries. However, there are refugees whose current salaries in Moldova are higher than the ones they had in Ukraine;
- Lack of equity in employment, refugees reported receiving envelope wages or being forced to work overtime;
- Difficulties identifying suitable jobs, and needing to try several jobs;
- Limited job opportunities in rural areas or small towns;
- Perception that refugees are not motivated to find jobs "because it is more comfortable to receive assistance from organizations";
- Capacity of job market in the Republic of Moldova cannot cope with the influx of refugees;
- Lack of childcare;
- Unsuccessful attempts to find work for specialists such as medical and veterinary doctors;
- Having skill sets that are not transferable to the jobs which refugees can find in Moldova;
- Limited income opportunities for retirees or people with disabilities that cannot work;
- Lack of guarantee that the refugees will remain in their position and will not be fired later;
- The website of the National Employment Agency which does not offer job opportunities for Ukrainian speakers;
- A future barrier – the expiration of the period for obtaining temporary protection.

Some respondents mentioned that refugees were perceived as "picky" and indecisive when accepting job offers. At the same time, it was highlighted that due to the Cash for Livelihood program, some refugees were able to find a job.

Barriers to *access to legal services*

Most respondents stated that the legal services available to beneficiaries are highly visible (posters, leaflets, etc.), locally available and easily accessible at request. However, difficulties in accessing consulate services due to high taxes that were not reduced following the start of the war ("war is war, but [the consulate] continues to make money"), long waiting times, insufficient human resources ("same as before the war") and the electronic forms that are not working properly were mentioned by respondents.

In *access to financial services,* the following barriers were mentioned:

- Lack of banks and ATMs in rural areas, which means additional transportation expenses to access banking services in urban areas:
- Difficulties with receiving cash through Posta Moldovei due to slow service, long queues, and commissions for certain transactions;
- Difficulties in obtaining a card for beneficiaries in rural areas;
- Limited knowledge of card usage or withdraw cash for elderly beneficiaries;
- Limited access to ATMs for beneficiaries with limited mobility;
- Difficulties in using cards from Ukrainian banks;
- Limited access to the bank in Palanca, which is only available for people crossing the border.

In order to overcome some of these barriers several respondents' organizations offered/are planning to offer cash through Posta Moldovei post offices, which is present in all settlements and can be easily accessed by all beneficiaries. According to the respondent, the post offices offered home delivery of cash assistance to people with limited mobility.

Improving access to goods and services

According the respondents, there are several ways to enhance access to goods and services for the beneficiaries:

- Focusing on improving existing services, rather than creating new ones;
- Involvement of the state through regulations on the markets;

- Increase of cash assistance amount. Particularly, increasing the support for groups that have higher costs of living (e.g., for people with disabilities with "an increase by at least 50%");
- Ensuring timely delivery of cash assistance and synchronized sending of SMS notifications about the transfer ("host families [...] give money to the refugees until they get the next top-up from UNHCR, putting them in these precarious situations that cause social tensions");
- Consolidating available services at the local level, in order to avoid the overlap of services and situations when beneficiaries "abuse the availability" and "take too many products [from different organizations]";
- Refugee databases for specific beneficiaries groups – e.g., elderly people, and people with disabilities, including their needs and whether there are covered;
- Improving mobility accessibility in RACs and other refugee accommodations ("a lot of work needs to be done in the RACs to improve the accessibility of all the people and people with disabilities");
- Improving access to specialized healthcare, by providing an opportunity for specialized medical check-ups;
- Providing more support to local communities;
- Customizing the food and hygiene packs distributed to beneficiaries, to ensure that the beneficiary does not have health restrictions regarding the consumption of certain products;
- Elaboration of plans from the Moldovan government on the integration of the Ukrainian refugees;
- Focusing on long-term solutions, such as psychological support or trauma-informed care;
- Existence of plans for beneficiaries that need palliative care;
- Integration processes on the labour market;
- Accent on Cash for Rent Program "as a way to encourage people to enter the market and encourage people to become independent";
- Improving enrolment in schools and kindergartens;
- For the local government (mayoralties and councils) to be responsible for informing and directing the refugees to available services and resources;
- Installing ATMs for MAIB and Victoriabank in rural localities where refugees reside;
- Offering psychological assistance through indirect support, such as discussion clubs, crafts masterclasses;
- Ensuring that vouchers distributed to the refugees can be easily used.

CONCLUSIONS

Based on the conducted surveys with customers, the following main conclusion were made:

- Prices: Regarding the price level at the nearest market where they usually shop, most believed the prices for food to be high and half – say the same about non-food items. Respondents reported price increases for most items compared to the same period last year. Fuel prices particularly were highlighted as having a significant increase. Overall, RM citizens mentioned higher prices and price increase for the items they usually bought, compared to the refugees. Apart from that, respondents from the South reported higher increases for the products they usually purchased. Moreover, for specific items like meat, fish, eggs, fruits, and vegetables, at least half of respondents found the prices to be unaffordable. Moldovan citizens, respondents from the Central, Southern regions and rural areas mentioned to a lower degree that the basic food and non-food items were affordable. While the reported prices for most essential items are relatively consistent across the total sample, with both refugees / citizens and respondents from different regions indicating mostly similar prices, there were notable differences in prices reported for beef and cheese.
- Availability: Overall, respondents found the current level of availability of both food and non-food items in stores and markets in their communities to be sufficient. The data suggests that interviewed refugees generally reported better availability for all the items, compared to the interviewed RM citizens. At the same time, it appears that respondents from Centre, Chisinau, South and rural areas mentioned a lower availability of products in their region. Most respondents did not encounter instances where they were unable to access food items typically part of their diet.
- Accessibility: There were no significant physical or social barriers registered among respondents in accessing marketplaces, with 94% indicating no such issues. The majority of respondents reported an average distance of 0.8 km to the nearest market where they usually buy food items, and a distance of 4.0 km to their usual non-food market. The biggest differences in the distance to usual market was observed for rural areas. When asked about the top four difficulties most frequently encountered by in accessing essential items, the top four were lack of money, high prices for non-food items, high prices for food items, and the high cost of gas/fuel/electricity. Respondents from the Southern, Central and Chisinau regions are most concerned with the high cost of gas/fuel/electricity. Rural respondents mentioned more often that they are currently facing problems with accessing essential products. When it comes to respondents' accessibility to financial services, the average distance to the nearest bank was 4.5 km, to the nearest ATM – 3.6 km and to the nearest financial service provider – 2.1 km. Chisinau respondents reported the lowest distances to the nearest bank, ATM or financial service provider. Posta Moldovei is the most available financial service across a majority of the respondents' localities.

Based on the conducted surveys with retailers, the following main conclusions were made:

- The majority of the stores included in the study offer up to 200 of distinct items on sale. The top four foods sold at the surveyed retailers are bakery products/pasta/corn/rice, sugar/sweets, vegetables and vegetable oil/butter. As for non-food products that are usually sold in the interviewed retailers, the top three are drinking water, hygiene products, and clothing/footwear.
- Most of the shops that were included in the survey do not have a shortage of any essential products and are not afraid of running out of stock for the products they sell. On the other hand, more than half of mention that the current stocks would last for up to 2 weeks.
- Most stores have up to 2 suppliers for most of the essential food and non-food products. However, it appears that for non-food items, retailers tend to have more than 2 suppliers.
- Retailers reported that most food and non-food suppliers are located either in their area in a different region of Moldova, predominantly - Chisinau.
- While the majority of interviewed retailers reported an increase of 10% in prices for most products they sell, the reported increase is lower compared to the one mentioned by interviewed customers. On the other hand, most interviewed retailers say they cannot accurately estimate what would the price of the items they sell be in a week's time.

- Most respondents mentioned that the products in their store are displayed in a way which makes the price tag visibility and identification/selection of products easy, that the waiting time at the checkout was under 10 minutes, that the receipts were automatic, that the shop accepted more than one form of payment and that it is not possible to purchase from the shop remotely.
- The top 3 sales-related problems currently faced by respondents are expensive gas/fuel/electricity for transportation and storage of goods, declining demand from the population, and high prices for food and non-food products set by manufacturers. Most retailers state that there are no issues regarding the access to the stores.
- The top three changes the interviewed retailers expect in the near future because of the war in Ukraine – a rise in prices, reduced purchasing power of buyers and reduced mobility of buyers.
- Every store in the sample accepts cash payment, while less than half accept payment by card.
- Most retailers have a bank, ATM and a financial service provider in their locality, at a distance of less than 1 km. Similar to the customer respondents, the majority of retailer respondents indicated Posta Moldovei as the most widespread financial service provider.

The main findings of the key informant interviews include:

- According to the interviewed organizations, the cash assistance offered to refugees is generally perceived as insufficient to meet the needs of the refugee beneficiaries, or only covers needs for a limited and short period. This opinion was mostly motivated by increased prices, insufficient consumption basket on which the sum was based and delays in distribution of cash to beneficiaries.
- Some interviewed key informants mentioned that goods outside of Chisinau were less diverse and less available. Refugees in Chisinau and larger towns reportedly enjoy better access to various services, compared to refugees living in smaller settlements.
- Key informants observed that education and health services became more difficult to access after the refugee crisis started, due to limited human capacity.
- The research finds that the interviewees believed that not all the refugees' needs are adequately addressed by the assistance provided, primarily due to the focus of humanitarian projects focus on particular groups. However, some key informants believed that the current assistance was sufficient, based on the organizations' monitoring of the market.
- Key informants mentioned that the prices for almost all goods and services have increased since March 2022, with most increases in prices for utilities, food, hygiene items, and accommodation. Some organisations were able to increase the sum of assistance, while others could not change it.
- According the key informant respondents, ways to enhance access to goods and services for the beneficiaries include focusing on improving existing services rather than creating new ones, increase of cash assistance amount, ensuring timely delivery of cash assistance and synchronized sending of SMS notifications about the transfer, and reducing overlap in service and good provision.

Based on the main findings of the conducted study, the following recommendations emerge:

- Rural areas seem to have lower availability and accessibility to essential products. It is recommended to analyse the possibilities for reducing main accessibility issues for this category.
- Particular essential items were deemed as inaccessible to a larger degree. It is recommended that this is considered when deciding on food assistance.
- The diversity of payment methods at retailers should be evaluated to decide whether measures are necessary to increase the possibility of using credit cards at stores.
- Posta Moldovei is the most available financial service provider, and it should be considered if there are changes to the cash assistance distribution.
- It is recommended to review the list of goods and services that the refugees need but reportedly cannot cover from the existing cash assistance, and analyze the possibility to timely assist with these goods/services.
- In case this point is relevant to the humanitarian objectives, it is recommended to evaluate the feasibility of supporting the growth of the human resources involved in providing assistance to refugee and host community.