UKRAINE

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Ukraine food security trend analysis

Key trends 2022

The war in Ukraine has had a significant impact on the country's food security situation. Amongst its dire human impact, the war has caused massive displacement as well as an increase in poverty and unemployment, which alongside rising food prices limits people's ability to access food. The large-scale displacement significantly adds to disruption of livelihoods across the country, while people living in proximity to the front line may find themselves cut off from basic services and functioning markets.

In March 2022, WFP established a remote monitoring system to assess and monitor the food security situation in the country, with continuously collected household data feeding into the WFP HungerMap LIVE. This brief builds on the monitoring data to establish an overall picture by macro region and quarter. As the data was collected for continuous monitoring purposes, and has seen changes in terms of sampling and questionnaire over the year, the results should be considered as broad trends, **indicative only of patterns and trends over the course of 2022**. Details on methodology are found on page 6 of this brief.

The data shows that the proportion of households reporting **inadequate food consumption were relatively steady but with an upward trajectory** over the course of 2022, from about a fifth to about a third of the surveyed households. Three in four households reported having resorted to food-based coping strategies.

Households chiefly relied on cash purchases as their main source of food, and while markets saw some critical disruptions in the early months of the war, supply issues relatively quickly stabilised in most of the country, outside the vicinity of the front line. At the same time, lack of access to stable income emerged as a critical issue. Adding to this picture the steadily upward trend of food inflation seen throughout most of 2022, it is clear that **economic access to food remains a key issue for food security**, as purchasing power has been hollowed out in 2022.

As has been noted since the first months of the war[1], **displaced people** were more likely to face difficulties in terms of food security and access to steady income. Another persistent trend is that **outcomes were worse in regions hardest hit by hostilities**, with the Eastern macro region having worse food consumption results, higher self-assessed need for income and food, and more disruptions to markets. Notably, assessments in newly accessible areas show that these areas suffered from **lack of access to basic services**, limiting market functioning and physical access to food—the extent of which may not even be fully reflected in the phone surveys due to connectivity issues.

WFP will **continue its remote food security monitoring efforts in 2023**, as well as keep undertaking assessments to hard-to-reach areas, to enable an adaptive and flexible response to the evolving food security situation.

February 2023

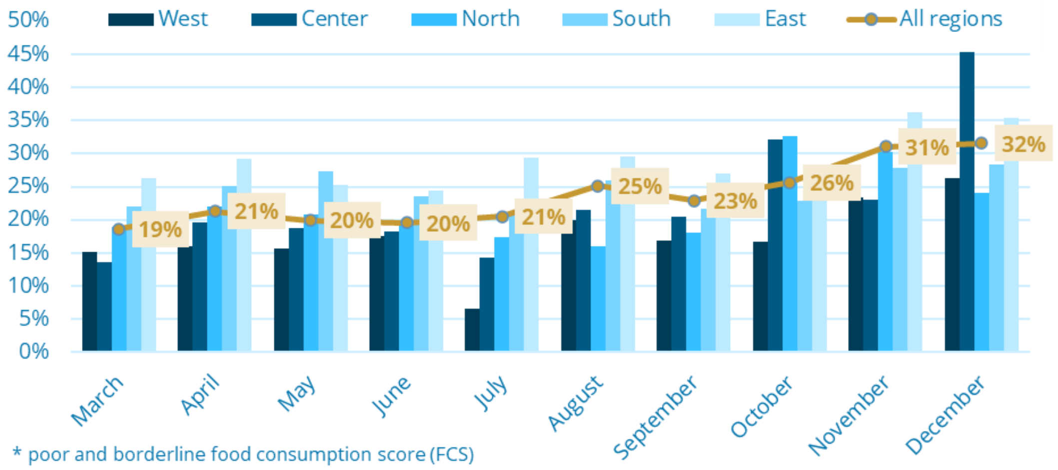
ESTIMATED NUMBER OF PEOPLE IN NEED, FOOD SECURITY AND LIVELIHOODS[2]	UKRAINE HUMANITARIAN NEEDS OVERVIEW, FEBRUARY 2022 (DONETSK AND LUHANSK ONLY)	UKRAINE FLASH APPEAL, AUGUST 2022	UKRAINE HUMANITARIAN NEEDS OVERVIEW, FEBRUARY 2023
	1.1M	9.3M	11.1M

Food consumption

The share of surveyed households with insufficient food consumption (defined as a poor or borderline food consumption score, FCS) increased from about a fifth to about a third from March to December. Among the macro-regions, the East had the highest share of households with insufficient food consumption nearly every month, while the West had the lowest share most months. See reference table 2 for definition of macro regions.

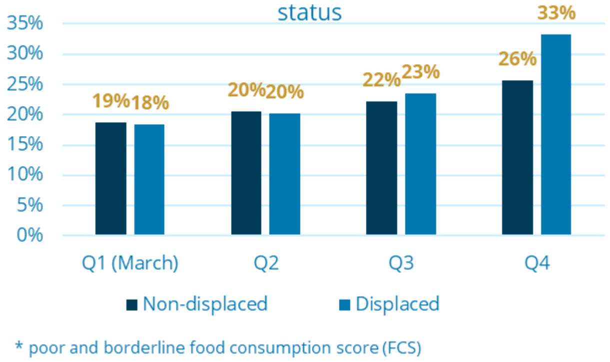
While the Q4 monthly figures should be considered highly indicative for the Center macro-region due to relatively small sample sizes, the increase in the share of surveyed households with insufficient food consumption in the Center from October may be explained by the continuing influx of the vulnerable internally displaced people to this macro-region.

Share of households with insufficient food consumption, by month and macro-region



While the share of households with insufficient food consumption increased both among displaced and non-displaced over 2022, the gap between those two population groups widened notably since the beginning of the winter season. As of Q4, the share of households with insufficient food consumption was around one on four for non-displaced, while one in three for displaced.

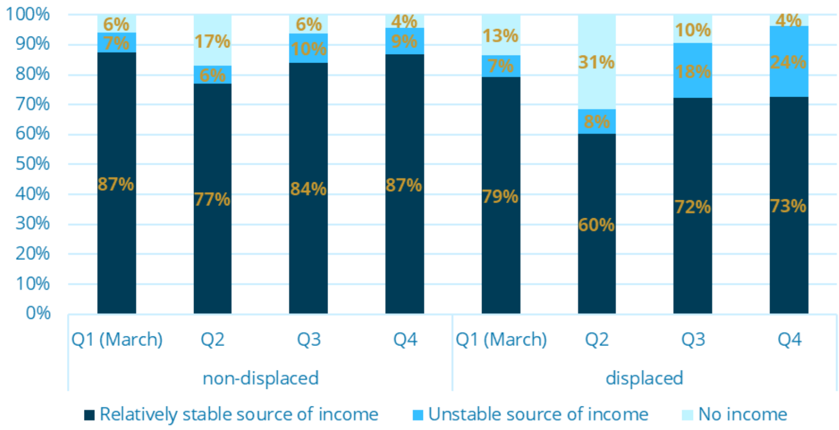
Share of respondents with insufficient food consumption*, by quarter and displacement status



"We eat food that we get from humanitarian organizations. We began to eat more pasta, cereals; meat - almost none ... We are trying to save money ... Previously, we cooked more salads, ate cucumbers, tomatoes - they are available, but the price is high. Milk is also expensive. We are trying to buy it for children... "
Man, 35, Zakarpattia, internally displaced

of all surveyed households had adopted food-based coping strategies at least once in the seven days prior to data collection

Type of income source, by quarter and residential status



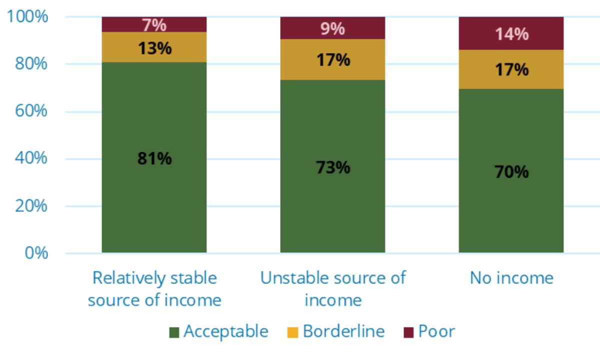
Food-based coping

There was no significant difference in the frequency of adopting food-based coping strategies among surveyed households from different macro-regions. The most commonly adopted food-consumption strategy was eating less preferred and less expensive foods (70 percent of all interviewed households did this at least once in the seven days prior to data collection).

Income sources

Following an increase in the share of households reporting no income (see reference table 3) in Q2, the situation appears to have somewhat stabilized during the summer season. On average, displaced are more frequently reporting having no income or rely on unstable income sources compared to non-displaced.

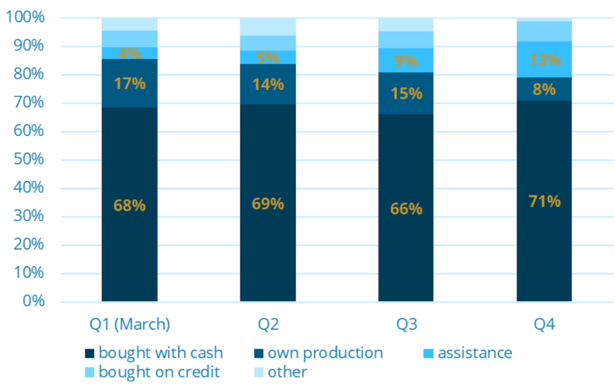
Food consumption score by income source (Q4)



Food sources

The main source of food for the majority of households throughout the year was cash purchases. While the share of households who reported relying on assistance as their main source of food is overall relatively small, it more than tripled from March to Q4 from four percent to 13 percent. This is consistent with increased provision of assistance over the course of 2022[3]. At the same time, the share of households who reported own production as their main source of food more than halved from 17 percent in March to only 8 percent in Q4. This may be a reflection of both the seasonal changes and the increased difficulty for home production in war affected agricultural producing areas[4].

Share of households by main food source, by quarter



A pattern can be seen in the relationship between the income source of the households and its food consumption: the share of households who reported insufficient food consumption among the households relying on a stable source of income is notably lower compared to households with unstable income or with no income. This reinforces the picture of reliance on cash to purchase food and economic access to food as the main hindrance to food security in Ukraine.

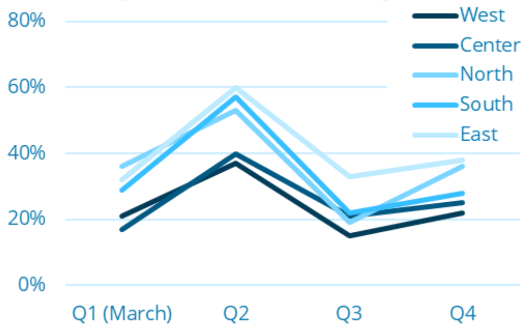
Markets, products scarcity and inflation

The share of households who reported that their local markets and shops were affected by the conflict (shops closed, had disrupted working hours or worked irregularly) increased significantly in Q2 compared to March, and decreased again in Q3. This finding is consistent with the supply chain disruptions experienced in the country in the earlier months of the war, which led to disrupted market supplies, but also saw a relatively quick bouncing back as actors along the supply chain adapted their sourcing and transport strategies[5]. As of Q4, North and East macro-regions had the highest share of households indicating disruption in markets (more than a third of respondents) while this share was lowest among households form West macro-region (about a fifth).

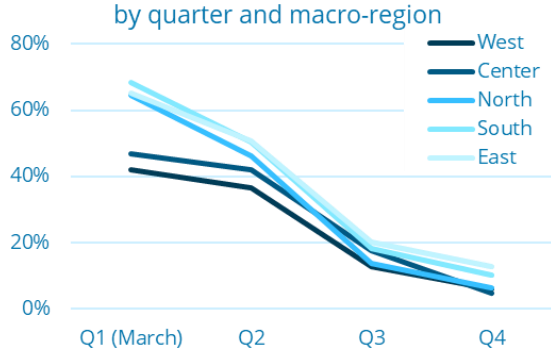
The availability of items in local markets improved significantly from the disruption seen in the early days of the war. On average, more than half (57 percent) of households reported scarcity in March – and in Q4, only 8 percent reported the same. Households from East and South noted more often that products are scarce compared to households from other macro-regions (11 vs 6 percent on average). Medicine was mentioned most frequently in East, South and North as being scarce, followed by fuel for cars and food (data refers to July).

Rapid market assessments in newly accessible areas have furthermore demonstrated that in markets close to the front line, market functionality is to a greater extent under pressure. In particular, lack of basic services (gas, water, electricity), led poorly functioning or virtually absent markets in several assessed locations in Kharkivska and Khersonska oblasts[6], further limiting physical access to food.

Share of households reporting disruption in market functionality, by quarter and macro-region



Share of households reporting product scarcity, by quarter and macro-region

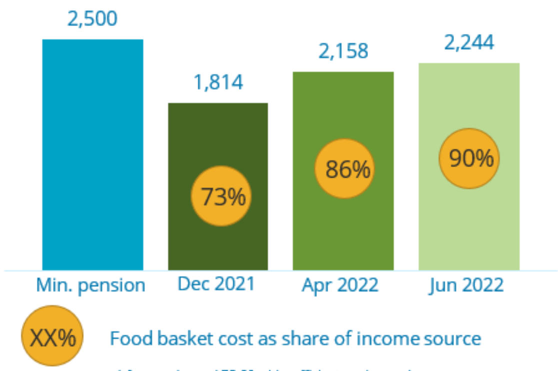


According to data provided by the National Bank of Ukraine (NBU), starting from February, prices for food gradually increased. In March 2022, food prices were 22.4 percent higher than in March 2021. For the next six month, an upward trend was observed, and in October food price inflation hit 35.7 percent year-on-year. This trend is mainly driven by the rise in fuel prices in May, the late spring, and the shortage of early vegetables in June, and the change of the official exchange rate from 29.3 to 36 UAH per 1 USD in July[5].

The increasing prices combined with lower or lack of incomes puts pressure on the purchasing power of Ukrainians. Analysis by the Kyiv School of Economics[4] shows that unemployed and pensioners with pensions lower than the average level (approx. 4,000 UAH/month; minimum pension 2,500 UAH/month) are unable to pay for food and non-food at the subsistence level. The situation is even more difficult for those who require medical treatment or without ability to grow food.

Based on latest NBU Inflation report[7] even though the revival of the economy in Q3 contributed to a reduction of unemployment, the number of job seekers far exceeds the number of vacancies. The unemployment rate remains high and on average in 2022 estimated at 25–26 percent, compared to 10.3 percent in 2021.

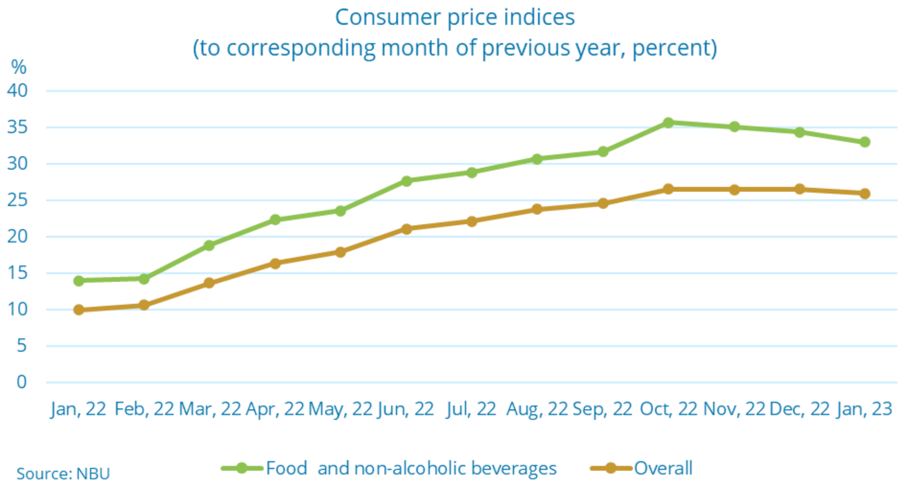
Minimal pension* vs. food basket (UAH)



** for people aged 75-80 with sufficient work experience*
Source: Kyiv School of Economics

"... The prices went up by 50-70 percent... We just buy less. I like vegetables and fruit, so I buy less today, instead of 1-2 kilos, just 500 grams. No more purchases with big quantities"

Woman, 57, Zakarpattia



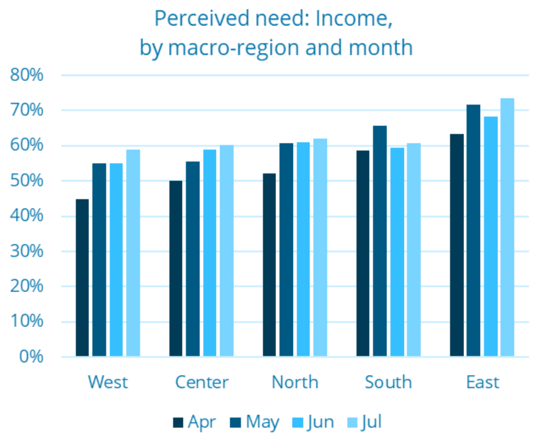
Perceived needs

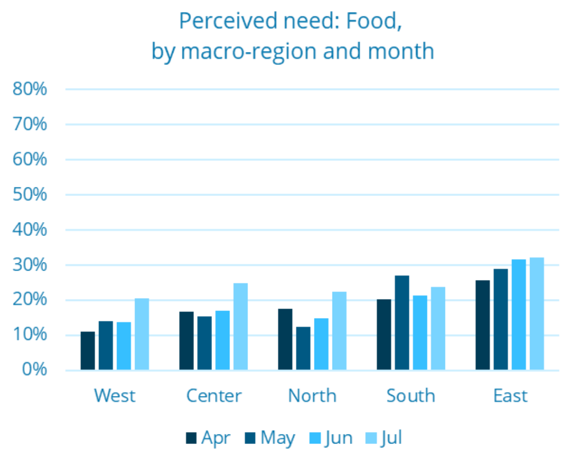
The survey made used of an adapted version of the HESPER scale[8], a scale used in crisis for people to self-identify serious needs. Respondents were asked if they perceived having a serious problem due to lack of income, with food, shelter, and other essential needs. The questions were only included in the survey until July.

Income was the most frequently mentioned perceived need, and the share of households reporting this concern increased in all macro-regions over the reporting period. As of July, around 60 percent of households expressed their concern about household income in all macro-regions except the East – where the same concern was expressed by almost 75 percent of households.

Perceived needs related to food grew fairly consistently over the reporting period in all macro regions, and was on average in July mentioned by 23 percent of households from West, Center, North and South. In the East, more than 30 percent of households expressed this concern.

These self-reported needs appear to reflect what the income data and the economic environment also shows: that lack of income was critical, and rising, during 2022—consistent with the picture of lack of economic access to food. It also confirms that access to both income and food is worse in the Eastern parts of Ukraine.





"I have no income at all – talking about myself, my family. Whatever income from business we had – it all remained in Kharkiv. So we live only on humanitarian support – the UN or via 'Diya'"

Man, 33, Vinnytsia , internally displaced

DATA & METHODOLOGY

The data referenced in this brief was collected remotely via phone calls, using the computer-assisted telephone interview (CATI) technique, and using random digit dialling technology for a random sampling of households. Calls were carried out by WFP contractors Geopoll (Mar-Jul) and the Kyiv International Institute of Sociology, KIIS (Aug-). An initial round of data collection took place between 10th of March and 12th of April and covered a representative sample of 4,741 households across 24 oblasts within the country. The findings based on this data were published in the Ukraine Food Security Report, May 2022. After this initial round, data collection continued with a slightly reduced sampling per oblast as a continuous monitoring exercise aimed at providing live updates on the food security situation through the WFP HungerMap.

As of 1st of August 2022, a total of 12,904 households had been interviewed across 24 oblasts. From August onwards, data collection continued with a reduced questionnaire and an adapted sampling approach (monthly sampling at macro-region strata instead of at oblast-level for the central and western parts of the country). In total, 4,137 interviewed were conducted from 12th of August till 27th of December.

Given that data collection was carried out remotely, it is likely that specific parts of the war-affected oblasts which are inaccessible due to the poor mobile connection coverage are underrepresented. This in particular applies to Kherson and Luhansk regions and may be partially applicable to inaccessible areas in Donetsk, Zaporizhzhia and Kharkiv regions. Provided this, and given that the overall population figures for Ukraine are likely to have been continuously changing due to the ongoing population movements inside the country and outwards, population weighting schemes were not applied to the analysis. The findings per macro-region are hence presented for indication and visualization of overall trends rather than provision of the exact prevalence figures.

Quotes are taken from a qualitative study carried out in June-August 2022 by WFP and KIIS, which focused on people's experiences during the initial months of war and the impact on their ability to meet essential needs.

List of references

1. Ukraine Food Security Report, WFP, May 2022
2. Figures can be found here:

- Ukraine Humanitarian Needs Overview 2022, OCHA, Feb 2022
- Ukraine Flash Appeal,OCHA, Aug 2022
- Ukraine Humanitarian Needs Overview 2023 (December 2022), OCHA, Dec 2022

3. WFP External Situation report 34, Jan 2023
4. Impact of war on agriculture and rural livelihoods in Ukraine, FAO , Dec 2022
5. Ukraine market analysis for effective WFP intervention, KSE, Aug 2022
6. WFP rapid market functionality assessments (Kpuiansk, Izium, Dergachi, Bilozerka,Vovchansk)
7. Inflation report, NBU, Jan 2023
8. The Humanitarian Emergency Settings Perceived Needs Scale (HESPER): Manual with Scale, WHO, 2011

Reference table 1: Household sample by macro-region and month

	Center	East	North	South	West	Total
Q1 (March)	**621**	**725**	**736**	**435**	**1025**	**3542**
Q2	**1357**	**1474**	**1824**	**989**	**2894**	**8538**
April	493	561	712	413	1094	3273
May	485	490	610	351	1009	2945
June	379	423	502	225	791	2320
Q3	**198**	**962**	**313**	**581**	**309**	**2363**
July	98	292	121	189	122	822
August	51	270	81	166	80	648
September	49	400	111	226	107	893
Q4	**124**	**1177**	**319**	**644**	**332**	**2596**
October	28	353	89	184	102	756
November	52	431	122	241	120	966
December	44	393	108	219	110	874
Total	**2300**	**4338**	**3192**	**2649**	**4560**	**17039**

Reference table 2: Macro regions

Macro region	Oblast
Center	Cherkasy, Kropyvnytskyi, Poltava, Vinnytsia
East	Dnipro, Donetsk, Kharkiv, Luhansk, Zaporizhzhia
North	Chernihiv, Kyiv city, Kyiv oblast, Sumy, Zhytomyr
South	Kherson, Mykolaiv, Odesa
West	Chernivtsi, Ivano-Frankivsk, Khmelnytskyi, Lviv, Rivne, Ternopil, Volyn, Zakarpattia

Reference table 3: Categorization of income sources

Category	Income sources
Relatively stable source of income	Wage Labour (Professional, skilled); Pension; Small/Medium Business trade, Small/Medium Business Agro; Military Service
Unstable source of income	Wage Labour (Unskilled, casual Agro); Wage Labour (Unskilled, casual non-Agro); petty trade; remittances; Humanitarian aid/gifts
No income	Borrowing money; Spending savings/ selling assets; no current source of income

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