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Joint Food Security and Livelihood Assessment

of Frontline and Bordering Regions in Ukraine

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DISCLAIMERS

TABLE OF CONTENTS

LIST OF TABLES AND FIGURES

List of Tables

List of Figures

List of Boxes

ABBREVIATIONS AND ACRONYMS

ACLED	Armed Conflict Location & Event Data Project
CARI	Consolidated Approach to Reporting Indicators of Food Security
CATI	Computer-Assisted Telephone Interviewing
CPI	Consumer Price Index
ECMEN	Economic Capacity to Meet Essential Needs
FAO	Food and Agriculture Organization
FCS	Food Consumption Score
FIES	Food Insecurity Experience Scale
FLB	Frontline and Bordering oblasts
GDP	Gross Domestic Product
GoU	Government of Ukraine
HDDS	Household Dietary Diversity Score
HNRP	Humanitarian Need and Response Plan
JFSLA	Joint Food Security, and Livelihoods Assessment
KIIS	Kyiv International Institute of Sociology
KSE	Kyiv School of Economics
LCS	Livelihood Coping Strategies
LCSI	Livelihood Coping Strategies Index
MEB	Minimum Expenditure Basket
MSNA	Multi-Sector Needs Assessment
PIN	People in Need
RDD	Random Digit Dialling
rCSI	Reduced Coping Strategy Index
SDG	Sustainable Development Goals
UAH	Ukrainian Hryvnia
UNFPA	United Nations Population Fund
USD	United States Dollar
UXO	Unexploded Ordnance
WFP	World Food Programme

EXECUTIVE SUMMARY

The full-scale war in Ukraine began on 24 February 2022 and quickly led to hostilities in the frontline and bordering (FLB) oblasts (regions) in the south and eastern part of the country, as well as in the northern region near the border with the Russian Federation. These FLB oblasts (including Chernihivska, Sumska, Kharkivska, Dnipropetrovska, Donetska, Zaporizka, Khersonska, Mykolaivska, Odeska, and Luhanska oblast) accounting for over 95 percent of the recorded conflict events, have suffered the most direct infrastructural damage, displacement, and economic devastation. This study provides an in-depth analysis of food security and livelihoods in the FLB oblasts, with a particular focus on agricultural livelihoods.

For households in the FLB oblasts, food remains a top concern, with 38 percent of the households identifying it as a priority need. Across these oblasts, the share of food-insecure households is estimated to be up to one-third. Unsurprisingly, proximity to the frontline plays a significant role—households living within 30 km of the frontline are far more likely to experience food insecurity.

At the macro-level, the war has led to over 25 percent decline in GDP, soaring food prices, and a quadrupling of the poverty rate, with supply chain disruptions and infrastructure destruction worsening food insecurity. Agriculture has been severely impacted, with vast farmlands rendered unusable due to areas being beyond the control of the Government of Ukraine (GoU), mines, and destruction, reducing food production. Labour market distortions are pronounced, with unemployment in frontline oblasts five times higher than in other oblasts, contributing to deepening regional disparities.

Economic hardships persist, exacerbated by the absence of working-age men, leaving many women and elderly individuals to shoulder financial responsibilities. 40 percent of working-age individuals—mainly women—are economically inactive, limiting household earning capacity. As a result, 35 percent of households rely primarily on external income sources such as pensions, social benefits, remittances, or humanitarian cash assistance.

Income has declined over the past year for a third of households, further straining their finances. Financial struggles are evident, with few households surveyed reported being able to afford all their needs, 38 percent of households are in debt, and 67 percent forced to adopt livelihood coping strategies, including cutting essential expenditures on health and education, which undermines long-term well-being.

Agriculture remains a crucial source of food and sustenance, with 82 percent of agricultural households primarily producing for their own consumption. However, the war has significantly reduced agricultural output due to land loss, rising production costs, and labour shortages caused by conscription, in addition to climate change. About 67 percent of agricultural households report urgent needs, particularly for inputs such as seeds (21 percent) and fertilizers or pesticides (15 percent).

Despite the conflict, food retailers remain operational. However, proximity to the frontline significantly impacts accessibility—only about half of households within 30 km of the frontline report functional supermarkets and shops, a notably lower rate than in other areas.

Access to perishable foods such as meat, fish, eggs, and fruits remains a major challenge for the households, with rising energy costs and conflict-related infrastructure damage driving up food prices. Perishable items have become luxury goods for many, disproportionately affecting lower-income households. With 48 percent of households spending more than 50 percent of their income on food, rising prices have forced many to cut back on non-food expenses, further straining household budgets.

Application of negative coping strategies is widespread, with large families, households with unemployed members, and those in the lowest income bracket particularly vulnerable. The persistence of such strategies underscores the severity of food access challenges in FLB oblasts, where economic hardship and displacement continue to exacerbate household vulnerabilities.

The Ukrainians living in FLB oblasts therefore require continuous humanitarian support. Households require sustained food and livelihood support, while agricultural support—such as providing seeds, fertilizers, pesticides, and greenhouse assistance—can improve household incomes and food production.

INTRODUCTION

Damage and demographic impacts

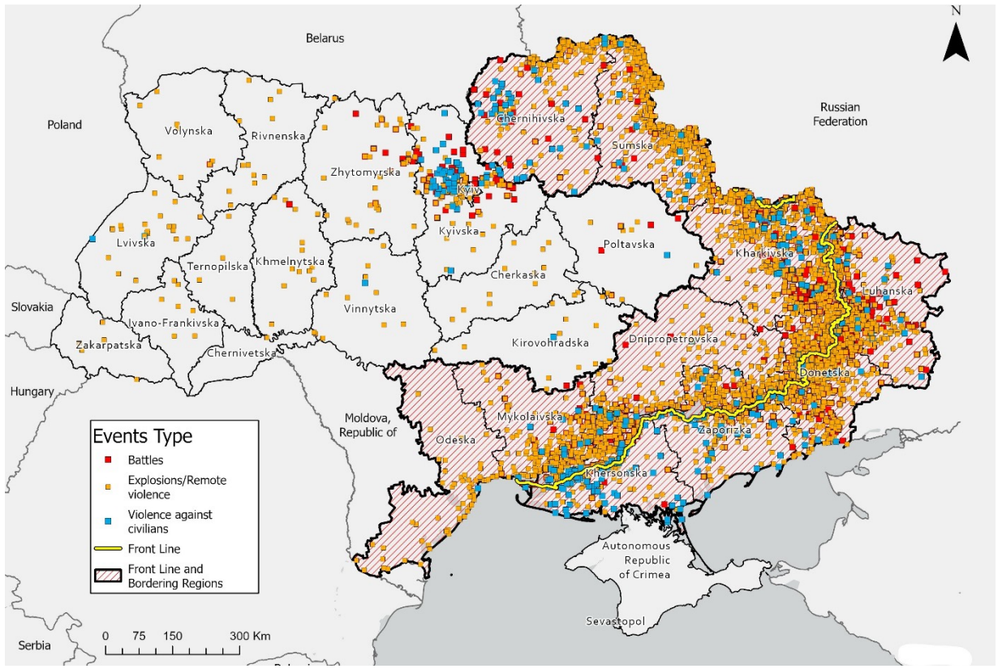
On 24 February 2022, a full-scale war in Ukraine began. While the international armed conflict has affected numerous oblasts (regions) across the country, hostilities have been most intense in the frontline areas of the eastern and southern regions, as well as in the northern region near the border with the Russian Federation. These Frontline and Bordering (FLB) regions (including Chernihivska, Sumska, Kharkivska, Dnipropetrovska, Donetska, Zaporizka, Khersonska, Mykolaivska, Odeska, and Luhanska oblast) have borne the greatest economic and humanitarian consequences of the war. As of November 22, 2024, the war had resulted in over 132,000 security incidents [1], with at least 12,162 civilian casualties and 26,919 injured [2]. More than 95 percent of these incidents occurred in the FLB oblasts.

The war has also led to direct infrastructural damages, disrupting supply chains and essential services for millions of people, particularly in the FLB oblasts. As of December 2024, total direct damages recorded by the World Bank Fourth Rapid Damage and Needs Assessment exceeded USD 176 billion [3] of which more than 72 percent occurred in the FLB oblasts. Housing alone suffered damages amounting to USD 56 billion. Combined with damages to energy, transport, telecommunication and water, the estimated cost of infrastructure damages stood at approximately USD 67 billion. The agricultural sector also suffered damages amounting to USD 11 billion. These widespread damages have hindered the easy movement of goods, services, and people, as well as reducing energy provision.

At the same time, the war triggered a massive displacement crisis resulting in demographic changes. As of October 2024, an estimated 6.9 million people from Ukraine were recorded as refugees across the world [4] and 3.7 million people were reported as internally displaced persons [5]. Almost 77 percent of the displaced persons originate from the FLB oblasts, and most of them have moved to oblasts different from their habitual residence towards the west and central regions[5]. Due to these population movements, Ukraine's population has shrunk by approximately 20 percent and the country's demographics have also changed. Oblasts within the FLB oblasts have seen their populations decline by about 52 percent, but others in central regions such as Poltava and Dnipropetrovsk oblasts have experienced an estimated eight percent population increase as they have welcomed a significant number of displaced persons[a]. Many of the displaced are working-aged women, while many men have been drafted into the military, leading to changes in household structures.

a This estimation is based on a comparison between the 2021 population data published by the State Statistics Service of Ukraine (Link), which reported a population of 41 million, and the UNFPA's population data for November 2024, which recorded 33 million. Note that the UNFPA data is based on the 2024 Ukraine Common Operational Dataset on Population Statistics (COD-PS) update, which is strictly a humanitarian data product of the United Nations and aligned to the "best available humanitarian data standard". The figures refer to the population of Ukraine without Crimea and Sevastopol. It does not represent or, in any way, replace official statistics or official population projections of the Government of Ukraine and it does not meet the international standards of official statistics.

Figure 1.1 Ukraine War Situation Update: 24 February 2022 - 24 November 2024



Source: ACLED data-conflict exposure. Access on 25 November 2024. Link

The economic consequences of the conflict

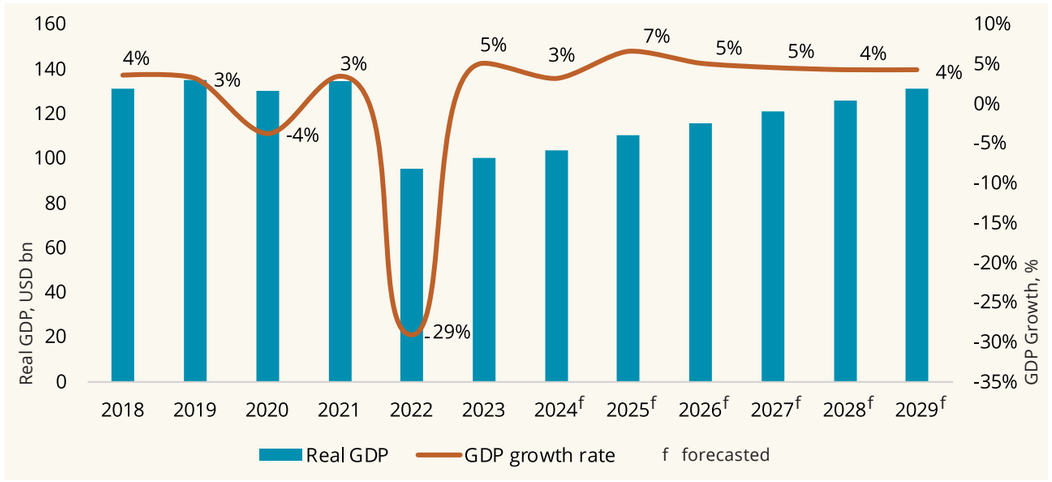
At the macro level, the war has had a severe impact on Ukraine's economy, leading to a significant drop in GDP. Prior to the full-scale war, the economy was just recovering from the impact of Covid-19 pandemic, growing at 3.4 percent in 2021. But as the war escalated, real GDP fell by 29 percent in 2022. The economy has gradually started to recover [6], driven by factors such as international support, surge in government expenditures, increased investments in the military-related industries, and general adaptation of the business to the new reality. Nevertheless, real GDP is not expected to return to its pre-war levels before 2030[b].

29%

Real GDP fell by 29 percent in 2022

b This projection is based on IMF forecast of real GDP growth to be around 4-5% over the next 5 years. IMF. Data mapper. November 2024. Link

Figure 1.2 Real GDP and GDP growth in Ukraine



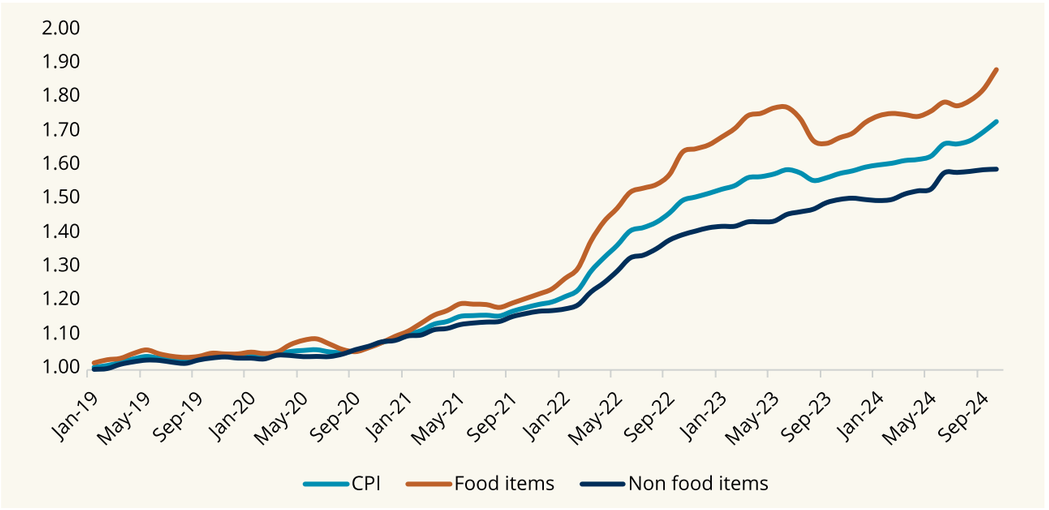
Source: International Monetary Fund Data Map [7]

The cost of living has also risen significantly. From January 2022 to November 2024, the Consumer Price Index (CPI) rose 42 percent, with food prices increasing 49 percent. This increase has been driven by a disruption of supply chains after the escalation in 2022, local currency devaluation which has depreciated by more than 40 percent, as well as the increased price of fuel and other imported materials. The destruction of transport and energy infrastructure has exacerbated the situation, making the distribution of goods, especially perishable food items, increasingly challenging and expensive. This has placed a heavy burden on Ukrainian households, particularly in a context where wage growth has not kept pace with rising prices. There has been an alarming rise in the poverty rate, which according to the World Bank, jumped from 5.5 percent to 24.1 percent in 2022 alone, pushing 7.1 million additional people into poverty [8].

49%

Food prices increase 49 percent since 2022

Figure 1.3 Trend in Ukraine Consumer Price Indices (2019 – 2024)



Source: State Statistics Service or Ukraine. Prices. November 2024

The war has severely impacted the labour market structure, resulting in a sharp contraction of the employed population. By November 2024, the Ukrainian working age population of ages 20-59 years had dropped to approximately 18 million, down from 22.7 million in 2021[c]. The workforce decrease is driven not only by displacement but also by the substantial number of people – especially men – being economically inactive or joining the military. The unemployment rate, which averaged around 10 percent between 2016 and 2021, spiked to 26 percent immediately after the full-scale war in 2022. Although it was estimated to decline to 13 percent by the third quarter of 2024 as businesses and workers adapt, it still remains above pre-war levels [9]. Based on the 2024 Multi Sector Needs Assessment survey data, unemployment is five times higher in the FLB oblasts compared to other oblasts[d].

Furthermore, the war has reshaped labour market dynamics, with significant regional and gender disparities. Central and western regions have seen a surge in job vacancies as a reflection of increase in economic activities, while FLB oblasts face sharp declines in labour demand due to territorial losses and industrial destruction[10]. This disparity has deepened economic inequalities, driving migration to central and western regions while leaving the FLB oblasts with a disproportionately high number of economic inactive people. The conflict has also shifted employment activities and composition, with employment increasing in defence, logistics, and healthcare, while contracting in manufacturing and agriculture[e]. Women have become more active in the labour market than before[10], as many men have joined the military or exited the workforce. However, women face challenges due to skill mismatches, particularly in agriculture, where traditionally male-dominated roles remain unfilled.

Agriculture, a major Ukrainian industry, has been particularly impacted, affecting its contributions to both local and global food security. Before the full-scale war, Ukraine was a major global agricultural producer, ranking sixth in corn, seventh in wheat, and accounting for over 30 percent of global sunflower seed production in 2021[11]. Agriculture was a vital sector, corresponding to over 10 percent[12]

c This estimation is based on a comparison between the 2021 population data published by the State Statistics Service of Ukraine, which reported a population of 41 million, and the UNFPA's population data for November 2024, which recorded 33 million. Link

d Estimation is based on Authors' calculation on the REACH, & World Food Programme. (2024, September 10). Multi-Sector Needs Assessment (MSNA) 2024: Food Security and Livelihoods Findings. Retrieved February 20, 2025. Link

e Based on the representative surveys conducted by Razumkov Center. November 2024. Link

of the country's GDP and almost 44 percent[13] of merchandise export value, employing 17 percent of the workforce—approximately 2.7 million people. By 2024, however, agriculture production's share of GDP had fallen to 11 percent[19] as the sector reported USD 11 billion in damages and USD 73 billion in direct losses[3]. Nevertheless, with other industries weakened by the war, the significance of the agricultural sector remains high. In 2023, its share in merchandise exports in value terms has exceeded 63 percent[20].

Vast areas of arable land in the FLB oblasts have become inaccessible or unusable, severely reducing food production. Almost 20 percent of Ukrainian territory is currently beyond the control of the GoU, and five million hectares of farmland are contaminated with mines [14]. According to the State Statistics Service of Ukraine [15], between 2021 and 2023, total agricultural output shrank by 28 percent. Key crops like cereals and legumes, essential for domestic and export markets, saw a 31 percent reduction in output, while sunflower production fell by 22 percent. Livestock numbers dropped sharply, with cattle declining by 18 percent and sheep and goats by similar margins. Production of meat, milk, and eggs fell by eight percent, 15 percent, and 19 percent, respectively. These declines are driven by reduced access to farmland, limited agricultural inputs, climate variability, and the particularly devastating impacts on the FLB oblasts.

BOX 1.1

War, climate variability and impact on agriculture

Climate change is increasingly affecting Ukraine's agriculture. Air temperature has been increasing for more than two decades and warming beyond 2.5°C has been shown to reduce yields. Frequent heatwaves cause plants to ripen too quickly, reducing their productivity and forcing households to adjust their planting calendar. This trend is already affecting southern Ukraine, where rising temperatures have led to changes in growing seasons [16]. Water scarcity has also become a central issue. Unpredictable rainfall makes it harder to depend on natural precipitation, especially in spring and summer. The irregular rainfall often led to low soil moisture across Ukraine, which has increased in oblasts set aside for winter crops, impacting around 60-70 percent of fields, including areas traditionally more water rich.

The combination of rising temperatures, flooding and irregular rainfall is lowering crop yields, creating favourable conditions for pests and diseases. In 2024, grain and oilseed harvest were estimated to decline by 10 percent due to extreme heat and drought [17]. Additionally, agriculture is gradually moving north as southern areas face harsher conditions [18].

Agriculture has been further impacted by the destruction of the Kakhovka Dam on June 6, 2023, which led to significant flooding in southern Ukraine affecting tens of thousands of hectares of agricultural land. The initial flooding submerged and destroyed crops across 5,000 hectares of land, leading to immediate losses estimated at USD 5.43 million [19]. Additionally, the Ministry of Agriculture indicated that the collapse could leave at least 500,000 hectares without irrigation, potentially turning these areas into deserts [20]. The long-term impact on soil fertility and agricultural productivity remains uncertain, posing challenges for Ukraine's farming sector.

Humanitarian consequences of the conflict

The war in Ukraine has had and continues to have devastating impacts on the population. The Ukraine Humanitarian Needs and Response Plan (HNRP) estimated that 12.7 million people in Ukraine are in need of humanitarian assistance, with the people in need concentrated in the areas in Donetska, Luhanska, Khersonska and Zaporizka oblasts beyond the control of the GoU, as well as areas bordering the Russian Federation like Kharkivska and Sumska [21]. In 2024, hostilities intensified particularly in these FLB oblasts, with 163,000 people relocated from this area via government-organized evacuations between May and October[21]. Over the course of 2024, WFP lost partial or full humanitarian access to more than 250 settlements in FLB communities, illustrating the severe impact of the war.

12.7 MILLION

People are in need of humanitarian assistance

Many more people have become food insecure as compared to before the escalation. The HNRP estimated that about five million people who represent 15 percent of the country's population are people in need of food assistance in 2025. While the 2025 food insecurity estimate represents a decline from the 2024 estimate [22], it is still significantly higher than the percentage of food insecure people in Ukraine prior to the escalation, and the percentage of food insecure population in other countries in eastern Europe[f]. Furthermore, the HNRP show that the prevalence of food insecure population in the FLB oblasts—nearly a third of the population—is significantly higher than the rest of the country[g]. The MSNA survey 2024[h] indicates that these FLB oblasts have not only experienced active conflict but also face challenges such as higher proportions of displaced people and unemployed individuals, coupled with lower average incomes.

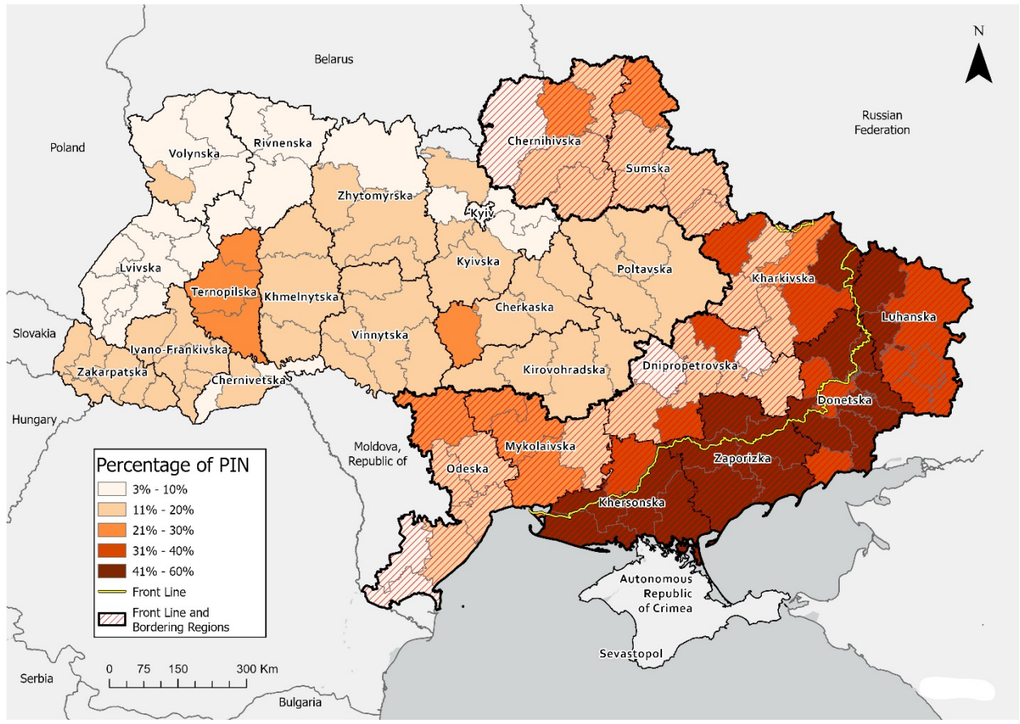
The situation in Ukraine remains volatile, with destruction, displacement, and disruptions to food supply and livelihoods continuing to impact millions, especially across the FLB oblasts. Unusable arable land, damaged infrastructure, and significant demographic shifts have left these regions disproportionately affected by food insecurity and economic stagnation. Moreover, military actions and frequent attacks continue to limit several parts of the frontline oblasts from humanitarian services. Recognizing this disproportionate impact, this study focuses specifically on the food security and livelihood situation in the FLB regions.

f While there are no comparable food security calculations for Ukraine prior to the full scale invasion, FAOSTAT shows widening gaps in food security levels between Ukraine and other Eastern European countries since the escalation. Link

g In this analysis, the frontline oblast includes Khersonska, Zaporizka, Donetska, Luhanska, Mykolaivska, and Kharkivska oblast.

h The 2024 MSNA was conducted by REACH in partnership with WFP between 21 May to 2 July 2024. Link

Figure 1.4 Prevalence of people in need of food and livelihood support by oblasts



Source: Food Security and Livelihood Cluster (2024)

Assessment Objective

This assessment aims to provide a comprehensive analysis of food security and livelihoods, with a particular focus on agricultural livelihoods, in the FLB oblasts of Ukraine. Given the profound impact of the ongoing war on these areas, the study examines key challenges and shifts since the onset of the full-scale invasion, offering a nuanced understanding of how households are coping with the evolving situation. By analysing both broad trends and localized impacts, the study seeks to generate actionable insights that inform policy and response efforts.

The report is structured as follows: Section 1 is the introduction, covering the damages and socioeconomic consequences of the war. Section 2 provides an explanation of the assessment methodology, including data collection approaches and the sociodemographic characteristics of respondents. Section 3 explores the livelihood conditions of surveyed households, highlighting economic activities and livelihood coping strategies. Section 4 offers an in-depth analysis of agricultural livelihoods and market conditions, focusing on farming practices, challenges, and agricultural needs. Section 5 examines food security levels, and the food coping strategies households employ in response to economic and food access constraints. Section 6 presents the conclusions and key recommendations, outlining priority areas for intervention and policy action.

Through this structured approach, the study aims to contribute to a broader understanding of the socioeconomic realities faced by populations in FLB oblasts, informing humanitarian and development responses to support resilience and recovery.

METHODS AND DATA

Methods

The Joint Food Security and Livelihood Assessment (JFSLA) surveyed 5,212 households across nine of the ten Frontline and Bordering (FLB) oblasts, including Chernihivska, Sumska, Kharkivska, Dnipropetrovska, Donetska, Zaporizka, Khersonska, Mykolaivska, and Odeska. Due to security constraints and inaccessibility, data could not be collected in Luhanska oblast. The data collection took place between August 11 and October 1, 2024, using the computer-assisted telephone interviewing (CATI) method, with respondents contacted through random digit dialling (RDD). The Kyiv International Institute of Sociology (KIIS) conducted the data collection.

Samples were drawn for urban and rural populations in each oblast[i], with a 90 percent level of confidence and a five percent margin of error. 2244 of the sampled households live in rural settlements. The results were re-weighted to reflect an 80 percent urban and 20 percent rural settlement distribution, consistent with Ukraine's settlement composition.

The intensified conflict in the FLB oblasts during the time of data collection presents certain limitations to the sampling. The survey excluded territories currently beyond the control of the GoU within the surveyed oblasts. In Donetska oblast, the study focused on Kramatorskyi, Pokrovskyi, and Volnovaskyi raions. However, the sample size in Volnovaskyi raion was notably small, with only 17 observations due to its proximity to active conflict zones. In Zaporizka oblast, the Zaporizkyi raion accounted for 95 percent of the surveyed households, as it encompasses the majority of the oblast's GoU-controlled areas. The remaining five percent of the sample was drawn from the GoU-controlled portions of Polohivskyi and Vasylivskyi raions, which represent a small fraction of the oblast's accessible population. Therefore, the data is not statistically representative for the entire oblast and should be interpreted with caution.

Household Characteristics

The sociodemographic characteristics of the surveyed households reveal a predominance of female-headed households and a high proportion of elderly individuals. More than half (54 percent) of the surveyed households are female headed, and a significant share of the household heads (40 percent) are elderly persons 60+ years. Most female heads (64 percent) are divorced, widowed, or single, a stark contrast to 20 percent of male heads in similar circumstances. Furthermore, 17 percent of households, predominantly those led by women (21 percent), are managed by a single care provider responsible for both children and elderly family members.

Most households (54 percent) consist of two-to-three members, while single-member households account for 25 percent, and larger households with four or more members are relatively few (22 percent). Children are present in only 33 percent of households, while most households that have children have only one child. 19 percent of households report having members who were conscripted since the beginning of the full-scale invasion, with this figure higher in rural areas (24 percent) than in urban areas (18 percent). Additionally, 5 percent of households include combat veterans.

i For this assessment, residents of cities and towns (also formerly known as urban-type settlements) were considered as urban population, while residents in villages as rural population. For settlement classification OCHA "Ukraine: Populated Places" dataset is used as reference.

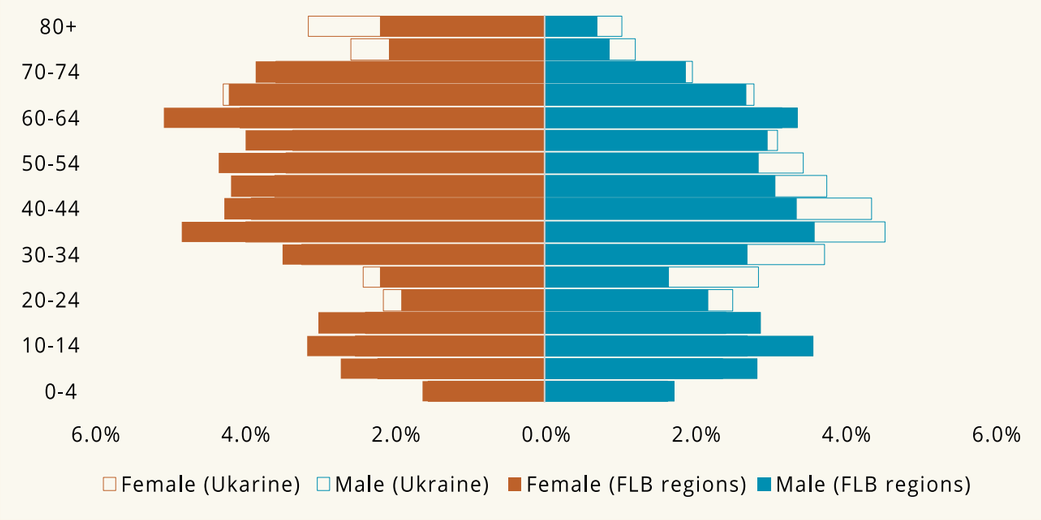
Table 2.1 Percent of households by household characteristics

	Total	Urban	Rural
Female headed household	54	55	52
Household head is below 35 years	13	13	11
Household head is between 36-59 years	48	47	51
Household head is 60+ years	40	40	38
Household with one member	25	26	20
Household with 2 members	32	32	32
Household with 3 members	21	22	19
Household with 4 or more members	22	20	29
Household with no children	67	68	64
Household with 1 child	20	20	19
Household with 2 children	10	10	11
Household with 3 or more children	3	2	6
Household with single care provider	17	16	17
Household with member with disability	31	31	29
Displaced household	14	15	12
Returnee household	14	16	10
Household with mobilized member	19	18	24
Household with pensioner	49	50	48
Household with war veteran	5	5	7

Source: JFSLA survey 2024.

The demographic profile of the surveyed households reveals a noticeable deficit of working-age men compared to the overall population distribution of Ukraine. Men aged 25–54 years, the prime age group for military recruitment, account for only 17 percent—significantly lower than the national estimate of 23 percent. A quarter (25 percent) of households—particularly female-headed households (30 percent)—lack a working-age adult (18 to 59 years), leaving only elderly members or minors in the household.

Figure 2.1 Population pyramid comparing FLB oblasts and estimated Ukraine population



Source: Authors compilation from JFSLA survey 2024 and UNFPA 2024

Health-related vulnerabilities are also prevalent, with one-third of households having someone with an officially registered disability. Displacement is another significant issue, with 15 percent of households in the urban settlement and 12 percent of households in the rural settlement being displaced families.

LIVELIHOODS SITUATION

Labour market situation

Economic inactivity is a significant issue among households in FLB oblasts. Over 40 percent of working age individuals between 15 to 64 years are economically inactive. While economic inactivity among young people aged 15–24 is primarily due to continued education, the situation is more concerning among working-aged women, particularly those aged 25–39. Within this group, 37 percent of women are economically inactive compared to only 15 percent of men.

The main reason for economic inactivity varies for men and women. For women, economic inactivity is attributed to family responsibilities. For instance, more than 80 percent of economically inactive women aged 25–39 are caregivers for their families. For men, the most common reasons for economic inactivity include security concerns, medical injuries, and the broader impacts of the conflict.

In the broader context of Ukraine's labour shortages, driven by the displacement of millions of people as well as conscription to military service, the high rate of economically inactive people poses a significant challenge to Ukraine's economy. This concern is heightened by the fact that even the most educated individuals are staying out of the labour market. Among working-age groups, 41 percent with vocational education and 26 percent with university degrees are economically inactive.

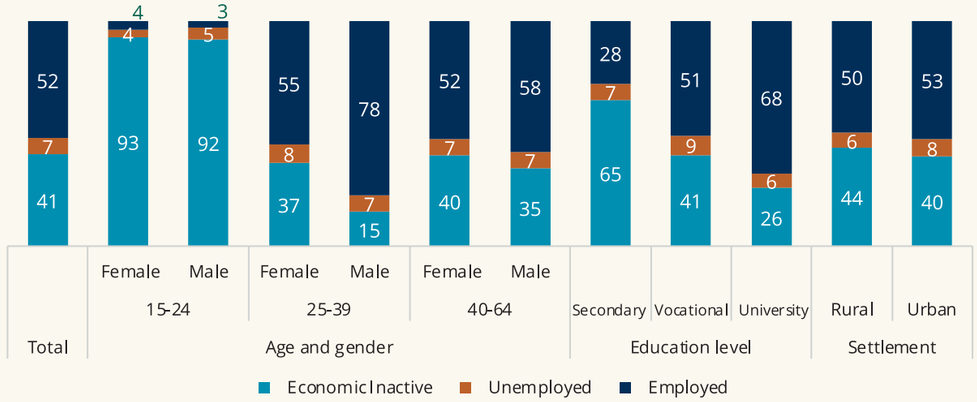
40%

of working age individuals between 15 to 64 years are economically inactive.

26%

with university degrees are economically inactive.

Figure 3.1 Employment status by individual characteristics



Source: JFSLA survey 2024

Despite the high levels of economic inactivity, the percentage of unemployed working-age individuals appears surprisingly low. Only 7 percent of the working-age population is unemployed and actively seeking jobs, whereas the rest of the working-age population is either not actively looking for work or is employed. However, disparities exist across oblasts, with Donetska and Khersonska oblasts reporting the highest rates of unemployment, with more than 10 percent of working-aged individuals being unemployed and looking for work. Displaced persons also experience higher unemployment rates compared to non-displaced individuals, underscoring the additional challenges they face in accessing the labour market.

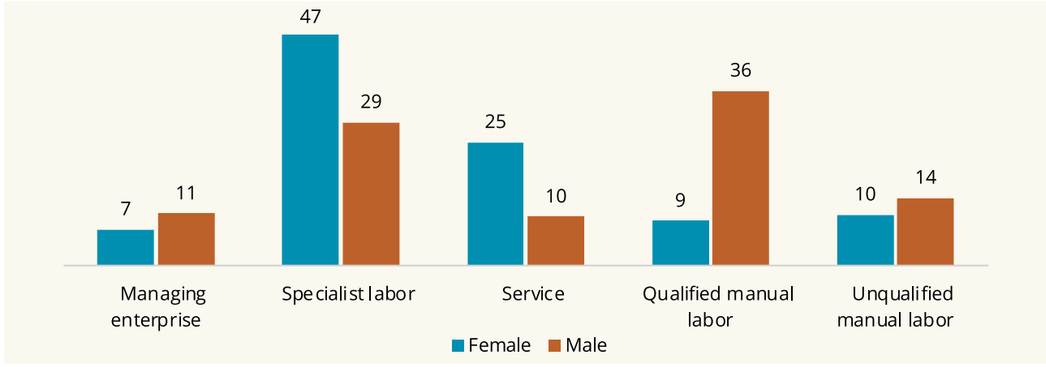
While security concerns and the temporary closure of businesses were cited as key reasons for unemployment, the low unemployment-to-working population ratio aligns with the overall situation in the country's labour market since the peak unemployment rates observed in 2022.

Despite its vulnerability, the labour market demonstrates surprising resilience, offering diverse opportunities, reflecting a remarkable resilience among the population. Almost 40 percent of employed individuals work in specialist professions such as doctors, teachers, lawyers, and engineers, showing a continued presence of skilled labour. Additionally, 21 percent of workers, predominantly men, engage in skilled manual labour such as plumbing and mechanics, while 18 percent, mostly women, are employed in service roles such as cashiers, secretaries, assistants, and receptionists. The remaining workforce is comprised of managers (9 percent) and unskilled manual labourers (12 percent).

Although there is evidence of gendered specialization in the labour market, there are indications that the conflict may be influencing traditional roles, with women gradually entering male-dominated sectors. Women are more likely to work in specialist professions such as doctors, teachers, and lawyers, while men predominantly work in skilled manual labor such as mechanics and plumbing. 10 percent of employed working-age women, compared to 14 percent of men, are engaged in unskilled jobs such as truck loading or cleaning jobs.

The labour market analysis also suggests a notable level of formality, with an average of 75 percent of workers holding written contracts. However, job security and labour protections vary significantly across employment types. For instance, only 57 percent of those in unskilled labour have written contracts, compared to 84 percent of individuals in managerial roles overseeing enterprises. This disparity highlights the uneven distribution of workplace protections and high presence of informalities among unskilled workers.

Figure 3.2 Percent of working individuals by type of employment



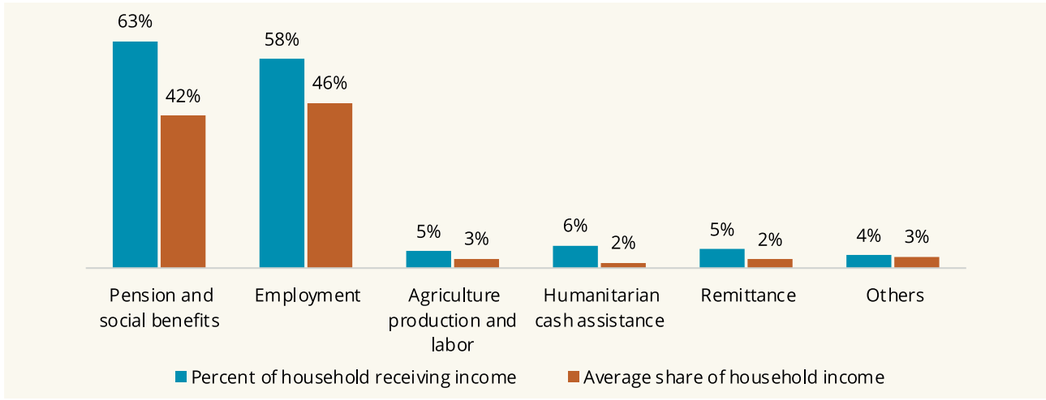
Source: JFSLA survey 2024

Household income

Income sources tend to be limited among surveyed households, with employment, pensions and other social benefits being the main sources. Employment income is reported as the primary source of income by 58 percent of households, primarily from jobs in public and private entities, while only five percent of households derive income from agricultural activities. Significantly, 63 percent of households receive pensions and social benefits, which contribute, on average, 42 percent of total household income. This high reliance on government transfers is due to the demographics of these areas, which include a significant proportion of elderly individuals and single caregivers who are beneficiaries of social protection programs.

More so, 6 percent of households report having received humanitarian cash assistance in the past 6 months. Humanitarian support is more prominent amongst households in the bottom 25 percent of income distribution, where 10 percent report receiving humanitarian cash transfers, and amongst those living 30 km from frontline, where 11 percent of households report receiving assistance. Humanitarian cash assistance receipt is also higher amongst households living in Donetska oblast (14 percent), Khersonska oblast (11 percent), and Zaporizka oblast (7 percent), which are partially beyond the control of the GoU. These patterns suggest that humanitarian aid is well-targeted, reaching those who are most vulnerable, particularly in areas closer to the frontline and among the economically disadvantaged. Other income sources such as remittances or investments are low.

Figure 3.3 Percent of households by their type of income



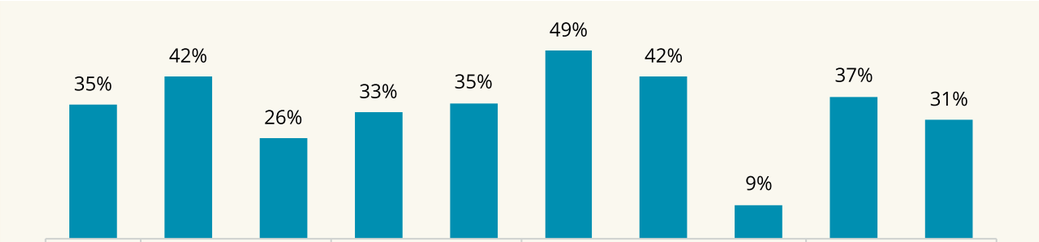
Source: JFSLA survey 2024

The analysis of income sources highlights relatively high levels of dependence on external support, with 35 percent of households relying exclusively on pensions, social benefits, remittances, or humanitarian assistance for their income. Among the households living closer to the frontline, the reliance on employment as a primary source of income is lower than in areas further from the frontline. Instead, these households exhibit a higher dependence on pensions, social benefits, and humanitarian cash assistance, reflecting the limited economic opportunities available in frontline areas. This dependence is particularly pronounced in Donetska oblast, where 54 percent of households do not generate any income from employment. Given the current context of decreasing humanitarian funds and a strained government budget for social protection programs, this widespread reliance on external support is particularly concerning as the conflict continues to disrupt traditional livelihoods and access to income-generating opportunities.

35%

of households relying on external transfers.

Figure 3.4 share of households without work income

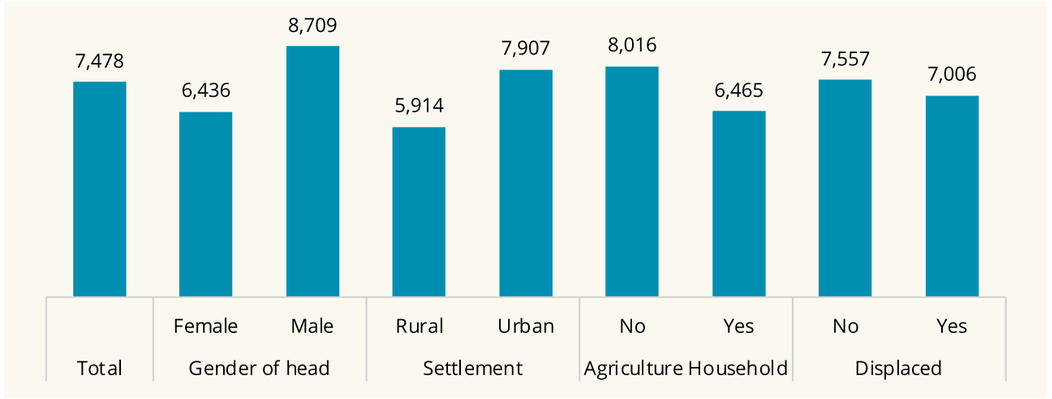


Source: JFSLA survey 2024

The average monthly income per household member in the surveyed areas is UAH 7,478 (around USD 180 per person per month). When compared to the international poverty line of USD 206 per person per month for upper-middle-income countries, this suggests that most households fall below this threshold. However, significant regional variations in income are evident, with oblasts such as Donetska, Khersonska, Sumska, Chernihivska, and Mykolaivska having lower income compared to others. In contrast, Dnipropetrovska oblast stands out with a notably higher average income of UAH 8,784 (USD 212). Proximity to the frontline further exacerbates income inequalities, with survey data showing a decline in per capita income as the distance to the frontline decreases.

Significant income disparities also exist among different household groups. One especially pronounced income gap is observed between female-headed and male-headed households, with female-headed households earning on average UAH 2,273 (USD 55) less per month. Rural households also earn a significantly lower income per capita compared to their urban counterparts, with an income gap of UAH 1,993 (USD 48). Although agricultural households earn less than non-agricultural households and urban workers, they generate higher income than the rural average and other rural livelihood options. Moreover, as shown in the agriculture section, most agricultural households are subsistence and semi-subsistence. Displaced households have UAH 551 (USD 13) on average per person per month less than non-displaced households.

Figure 3.5 Average monthly income per capita by household types, UAH thousand

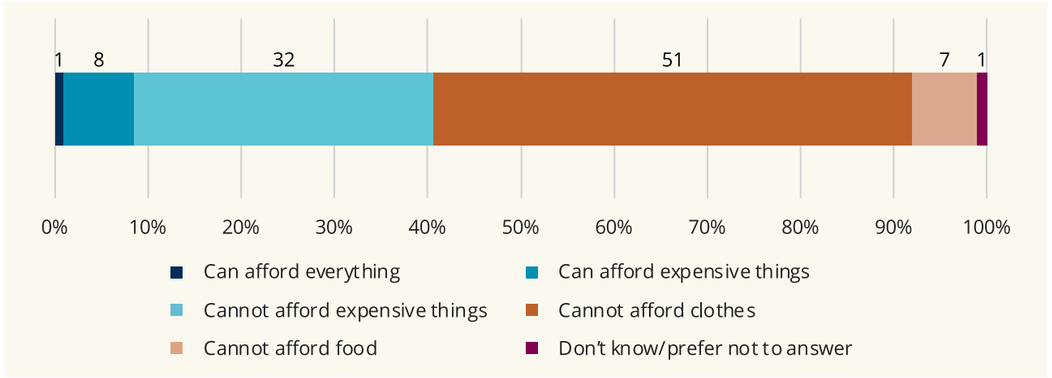


Source: JFSLA survey 2024. Note USD 1 =UAH 41.5

Livelihood challenges

For most households, household income is not sufficient to meet their needs. Only one percent of the households surveyed reported being able to afford all their needs. Thirty eight percent of households said they can no longer afford expensive things (e.g. Television or fridge) and 51 percent cannot afford clothes. The challenging situation of limited income sources, coupled with rising prices for essential goods, poses significant threats to household well-being. This results in decreased purchasing power, and many households struggle to meet their basic needs.

Figure 3.6 Percent of households by extent to which their income helps meet their needs

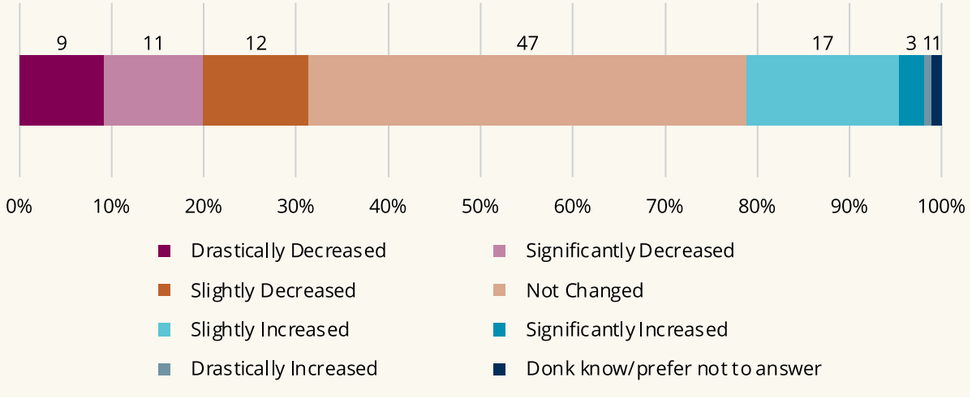


Source: JFSLA survey 2024

This precarious situation arises from a confluence of factors, most notably the high rate of economic inactivity among working-age individuals and the widespread decline or stagnation of household incomes. 31 percent of households reported a decline in income over the past 12 months, with 9 percent even experiencing a drastic decrease. Meanwhile, 47 percent of households surveyed indicated that their income remained unchanged. Displaced households were particularly vulnerable, experiencing a sharper decline in income compared to others. Similarly, households residing closer to the frontline reported more significant income reductions. Even if household income remained unchanged, the soaring prices have eroded purchasing power. Survey results corroborate this trend, with 31 percent of those households that reported a decrease in their income, citing price increases outpacing income growth as the primary reason for their declining purchasing power. Additionally, 25

percent of households attributed an income reduction to job losses or reduced working hours, while 6 percent mentioned that they stopped receiving government or humanitarian assistance.

Figure 3.7 Percent of households by change in household income over the last 12 months

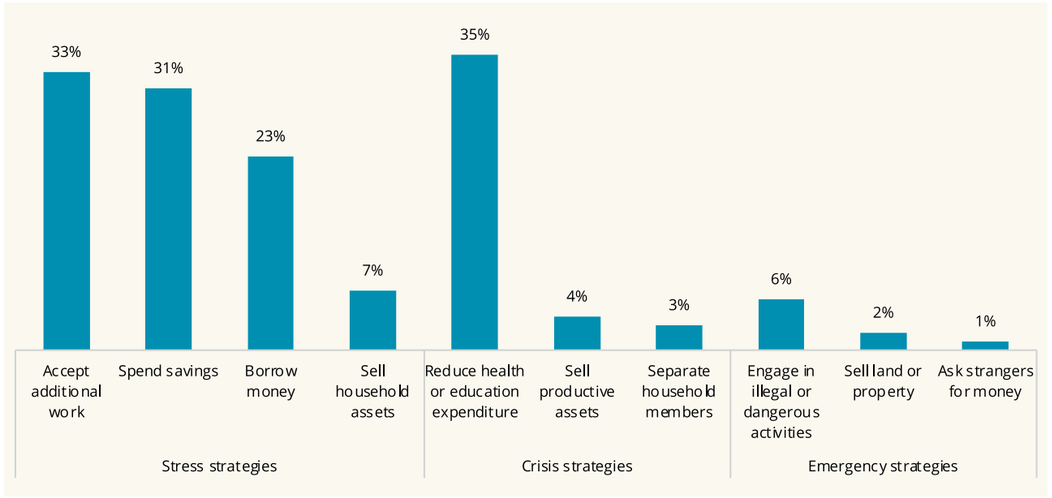


Source: JFSLA survey 2024

The socioeconomic situation of the households is further characterized by financial instability with most households burdened by debt, depleted savings, or lack of access to formal financial services. thirty eight percent of households reported being in debt at the time of data collection, with the majority having taken on new debt since the onset of the full-scale invasion. Among these, 38 percent cited basic services such as energy and utilities as the primary reason for borrowing, followed by 17 percent for medical expenses and 13 percent for food. The rapid depletion of savings further compounds this financial instability. Only 24 percent of households report having any cash savings, with savings depletion most pronounced among female-headed households, the lowest-income groups, and those living within 30 km of the frontline. This is particularly alarming, as savings often serve as a critical buffer for resilience, especially in situations requiring evacuation or displacement. Adding to these challenges, access to finance remains limited. Only 49 percent of households report having access to formal financial services, with those lacking savings being disproportionately excluded.

Facing mounting financial pressures, many households are resorting to negative and unsustainable coping strategies to meet their immediate needs. Critically, 67 percent of households report relying on livelihood coping mechanisms, with 34 percent employing crisis-level strategies, 24 percent stress-level, and nine percent emergency-level coping strategies. These strategies are concerning as they involve compromising future well-being to address present needs. In the 30 days prior to the survey, 35 percent of households reported reducing expenditures on health or education—decisions that could have long-term impacts on human capital development and resilience. Additionally, 31 percent have depleted their savings to cover necessities, while 23 percent have borrowed money, further diminishing their ability to withstand future shocks or endure a prolonged crisis.

Figure 3.8 Percent of households by coping strategies adopted



Source: JFSLA survey 2024

Agricultural households, already facing significant income constraints, are further burdened by the need to adopt negative coping strategies. Over 20 percent have reduced spending on essential agricultural inputs, which could have lasting consequences for their long-term productivity and food security. These crisis-level strategies are especially prevalent in areas near the frontline, where economic opportunities are scarcer, supply chains are disrupted, and the cost of living is often rising due to heightened insecurity.

The convergence of reduced income, rising prices, and widespread reliance on coping strategies paints a picture of the livelihood hardships experienced by households in the FLB oblasts. The dependency on external support, combined with limited financial resilience, raises concerns about the long-term sustainability of the communities living in the oblasts, particularly amidst ongoing conflict and financial instability.

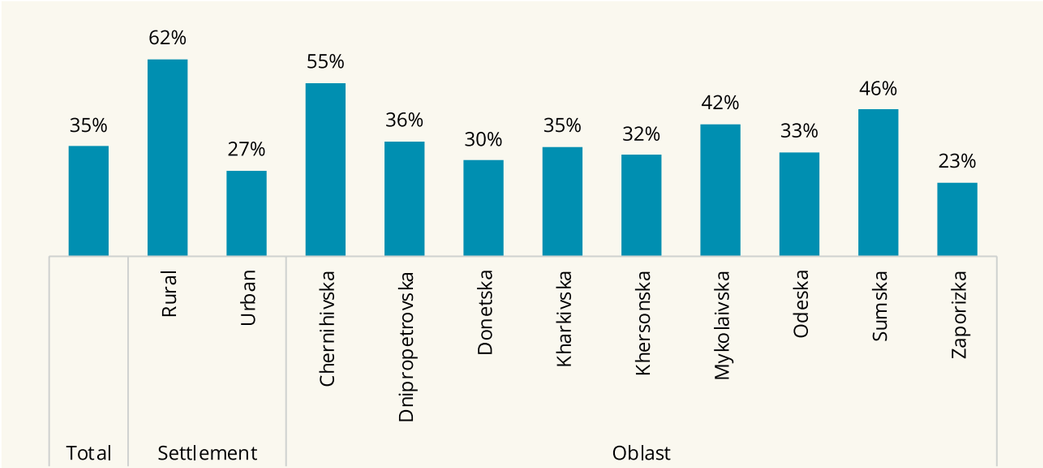
AGRICULTURE AND MARKET

Agriculture Profile

This report classifies households who report any form or level of agricultural activity – whether crop production or livestock rearing - in the year of data collection (2024) as agricultural household. About 35 percent of the surveyed households reported agricultural activities in the year of data collection. This represents a 2-percentage point increase from the 33 percent that participated in agriculture in the previous year (2023).

Most households in rural settlements (62 percent) participate in agriculture, as well as a significant share of households in urban settlements (27 percent). The share of agricultural households varies by oblast, with the highest proportions observed in Chernihivska (55 percent), Sumska (46 percent), and Mykolaivska (42 percent) oblasts. In contrast, Khersonska (32 percent) Donetska (30 percent), and Zaporizka (23 percent) have the lowest share of agricultural households. The occupation of parts of these oblasts, coupled with ongoing military activities and mine/UXO contamination has reduced both land availability for agricultural production and the number of farmers willing or able to cultivate land in these oblasts.

Figure 4.1 Percent of agricultural households by settlement and oblast

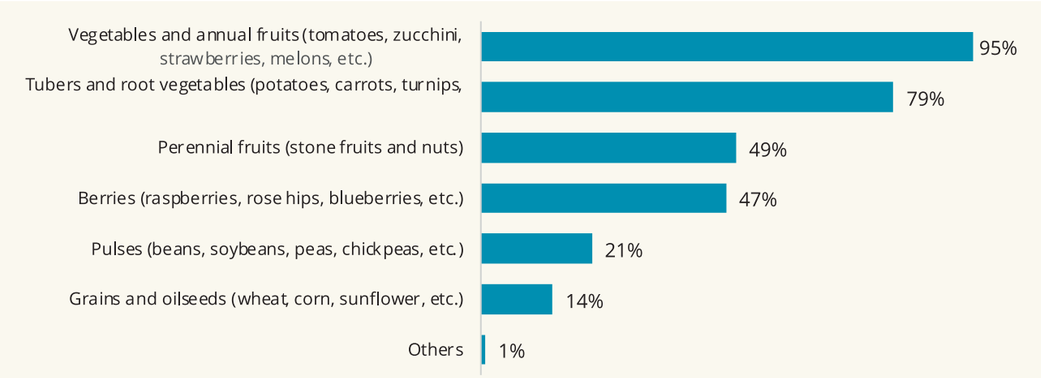


Source: JFSLA survey 2024

The types of agricultural activities conducted by agricultural households vary by settlement. 95 percent of agricultural households are crop farmers while 39 percent are livestock producers. Further disaggregation shows that 61 percent of agricultural households only produce crops, five percent raise livestock only, while 34 percent are mixed farmers. While proportion of crop producers within the agricultural households in rural (95 percent) and urban (95 percent) settlements do not differ, the share of livestock producers in rural settlement (58 percent) is significantly higher than the share in urban settlements (26 percent). Similarly, across all the oblast surveyed, the share of crop produces within agricultural households exceeds 90 percent, but the share of livestock producers tends to be higher in Mykolaivska (52 percent), Khersonska (50 percent), Chernihivska (49 percent) and Odeska (49 percent) oblasts compared to the average.

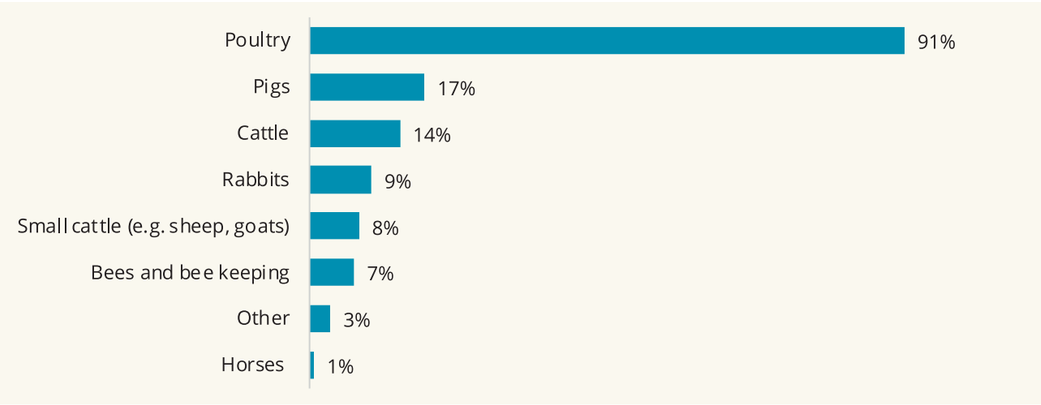
The main types of crops produced by crop farmers are vegetables and annual fruits including staples like tomatoes, zucchini, and melons, alongside seasonal favourites like strawberries. These items are produced by 95 percent of crop farmers (or 90 percent of all agricultural households). Tubers and root vegetables such as potatoes, carrots, turnips, and beets, follow closely, being produced by 79 percent of crops farmers (75 percent of all agricultural households). Perennial fruits including stone fruits and nuts are also cultivated by 49 percent of crop farmers (77 percent of agricultural households). Poultry is overwhelmingly the most common livestock, raised by 91 percent of livestock producers or 35 percent of all agricultural households. Pigs, cattle, rabbits are also present but are less common.

Figure 4.2 Share of crop types produce by crop farmers in 2024



Source: JFSLA survey 2024. Note: result does not add up to 100 percent because of multiple selection

Figure 4.3 Share of livestock types produce by livestock producers in 2024



Source: JFSLA survey 2024. Note: result does not add up to 100 percent because of multiple selection

The average farm size owned by the crop producers is 1.3ha, closely aligning with the national average for family farms in Ukraine, which stands at 1.2ha[j]. Average farm size does not vary significantly by oblast or whether the farmer is crop-only farmer or mixed farmer but varies significantly by settlements and gender of the head of household. Rural crop farmers have on average 0.1ha more than urban crop farmers while male headed households have 0.08ha more than female headed households.

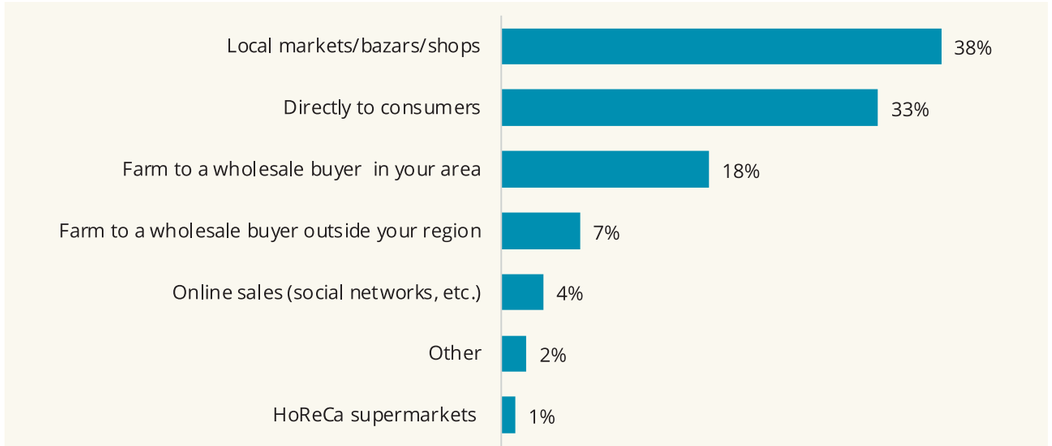
Most agricultural households (82 percent) primarily produce for their own consumption and do not

j Vasylieva, N., & James Jr., H. (2020). Prospects of family farming: Ukrainian vs EU experience. Journal of International Studies, 13(3), 129-142. Doi: 10.14254/2071-8330.2020/13-3/9

sell their farm produce. This tendency for self-provisioning to meet immediate household needs is most pronounced among crop-only farmers, where 89 percent do not sell their harvest, compared to 72 percent of mixed farmers and 54 percent of livestock farmers. Female-headed agricultural households are significantly more likely to engage in self-provisioning (85 percent) compared to male-headed households (79 percent). Similarly, urban agricultural households (87 percent) are more likely to cultivate solely for their own consumption compared to rural agricultural households (73 percent). This suggests that agricultural production in rural areas is more likely to serve a dual purpose—both as a source of household food consumption and as a means of generating income. Also, while there is no significant difference across oblast, the tendency towards farming for own consumption intensifies closer to the frontlines; within 30 km from frontline, 87 percent of households consume most of their agricultural production.

The agricultural households who sell their agricultural products do so primarily through local markets (38 percent) and direct-to-consumer sales (33 percent). Other market outlets include farm to wholesalers within the area (18 percent) and outside the area (7 percent). Rural agricultural households are more likely to sell directly to consumers while those in urban settlements are more likely to sale to local markets and shops.

Figure 4.4 Share of market outlet for farmers selling farm produce



Source: JFSLA survey 2024. Note: result does not add up to 100 percent because of multiple selection. HoReCa means hotel restaurants and cafés.

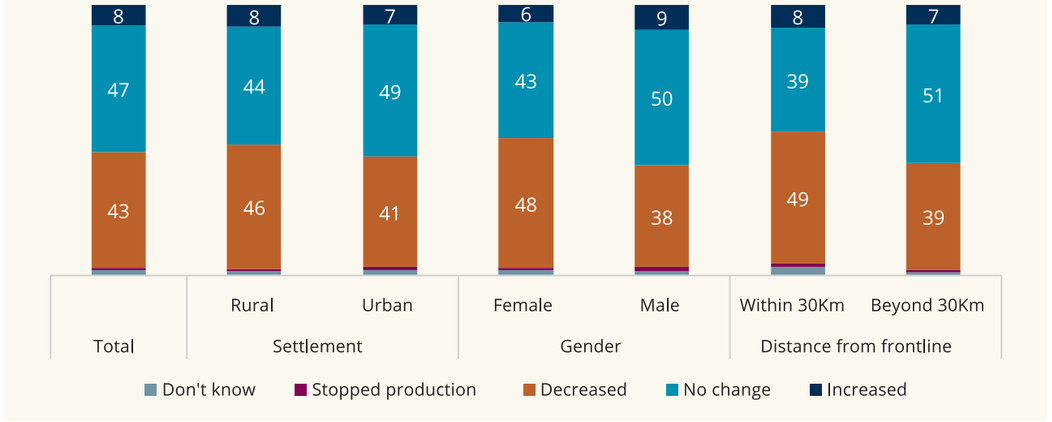
Impact of conflict on agriculture activities

Agricultural yields have declined for a significant number of households compared to the previous year. A substantial 43 percent of agricultural households reported a decrease in production, while 1 percent ceased production of certain products, primarily livestock. In contrast, only 8 percent of agricultural households reported an increase in yield. Certain groups are disproportionately affected. Agricultural households in rural settlements and female-headed agricultural households are more likely to report a decline in agricultural yield compared to their counterparts. The proportion of agricultural households reporting a decline in yield increases with closeness to the conflict zone. For example, 49 percent of agricultural households within 30 km of the frontline reported a decrease in yield, compared to 39 percent of those living farther than 30 km.

43%

of agricultural households reported a decrease in production

Figure 4.5 Share of households by change in agriculture production compared to previous year



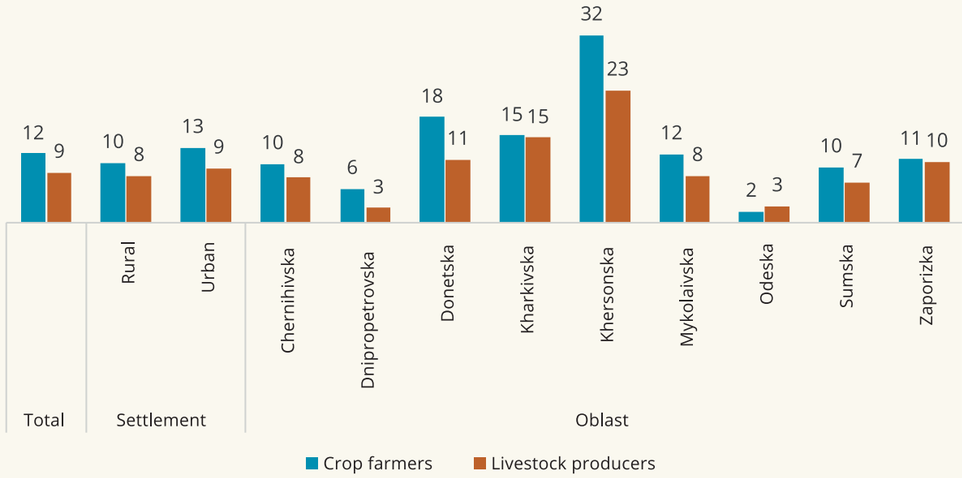
Source: JFSLA survey 2024

Military mobilization has also impacted agricultural activities, with 25 percent of households reporting a loss of labour, compared to 61 percent reporting no impact across the agricultural households. Rural agricultural households were disproportionately affected, with 30 percent reporting lost labour, compared to 22 percent of urban households. Furthermore, 17 percent of rural agricultural households reported a loss of specialized labour, compared to 9 percent of urban households. Both male- and female-headed households reported the loss of extra help as the most significant impact, affecting 22 percent and 28 percent respectively.

Beyond labour shortages, the war has taken a significant toll on agricultural resources, with 18 percent of crop farmers reporting a decrease in cultivated land area and 24 percent of livestock producers reporting loss of livestock. The share of crop producers reporting a decrease in crop land is higher in rural settlements, specifically in Chernihivska oblast (30 percent), Sumska oblast (26 percent), and Donetsk oblast (23 percent). On livestock losses, Khersonska oblast is most affected, with 57 percent of households reporting animal losses, followed by Kharkivska (31 percent) and Mykolaivska (30 percent) oblasts. These losses often involve households being forced to slaughter, sell, or give away their animals. The animal losses in Khersonska oblast are not surprising as it reflects the direct consequences of the destruction of the Kakhovka Dam on June 6, 2023, which led to significant flooding, affecting tens of thousands of hectares of agricultural land. The impact on cultivated land area and livestock losses is also particularly severe in areas closest to the frontlines.

Military activity and destruction have damaged agricultural land for 13 percent of the agricultural households, rendering it unusable for both livestock and crop production. Land damage is slightly higher in rural settlements than in urban settlements. Across the surveyed agricultural households, 12 percent of crop farmers reported land made unfit for cultivation, and 9 percent of animal producers reported land rendered unsuitable for livestock grazing. The damage is most extensive in Khersonska, Kharkivska, and Donetska oblasts. For arable land, Khersonska oblast suffers the greatest impact (32 percent), followed by Donetska (18 percent) and Kharkivska (15 percent) oblasts. Similarly, for livestock grazing land, Khersonska oblast reports the highest impact (23 percent), followed by Kharkivska (15 percent) and Donetska (11 percent) oblasts.

Figure 4.6 Share of agricultural households reporting land damages due to military activity



Source: JFSLA survey 2024

Another impact of the conflict is the rising cost of production without a corresponding increase in revenue, squeezing agricultural profitability. While the conflict has affected many aspects of agriculture, income from agricultural sales has remained stable for most households. However, this stability should be viewed in the context of widespread subsistence farming, where most households primarily produce for their own needs. Notably, 57 percent of crop farmers reported no change in income from crop sales compared to last year, while 12 percent experienced a decline. At the same time, 53 percent of crop farmers reported increased production costs. As a result, even though income levels have remained stable for many, rising costs have eroded profits, further straining household resilience.

A similar trend is observed among livestock producers, with 58 percent reporting no change in revenue and 20 percent experiencing a decline, while 56 percent faced rising production costs. Regionally, Odeska (58 percent) and Dnipropetrovska (57 percent) oblasts recorded the highest increases in crop production costs, whereas Kharkivska (65 percent) and Zaporizka (65 percent) oblasts experienced the most significant increases in livestock production

53%

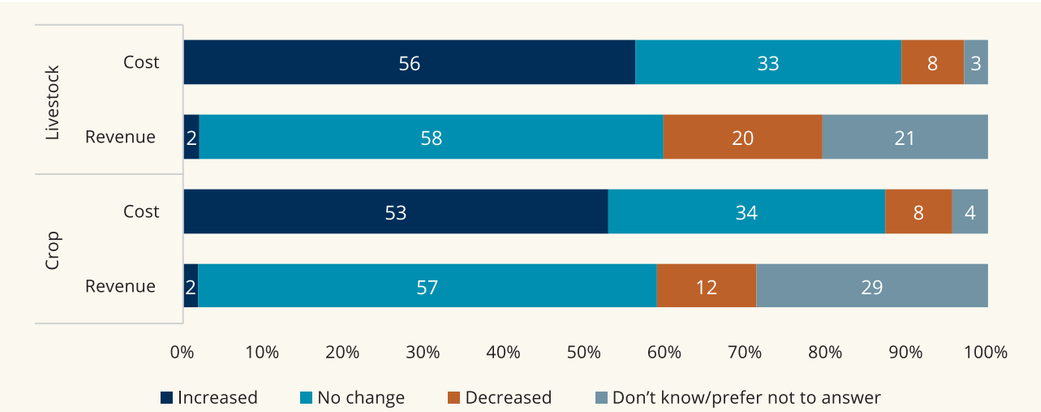
of crop farmers reported increased production costs.

56%

of livestock farmers faced rising production costs.

costs. These rising costs, without proportional revenue growth, further strain agricultural households, reducing overall profitability and economic resilience.

Figure 4.7 Changes in agriculture revenue and production cost compared to previous year

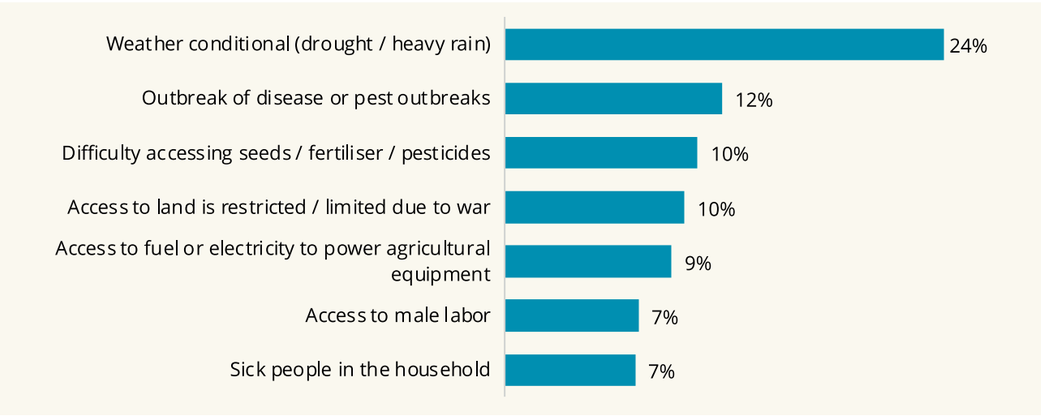


Source: JFSLA survey 2024

Agricultural challenges and needs

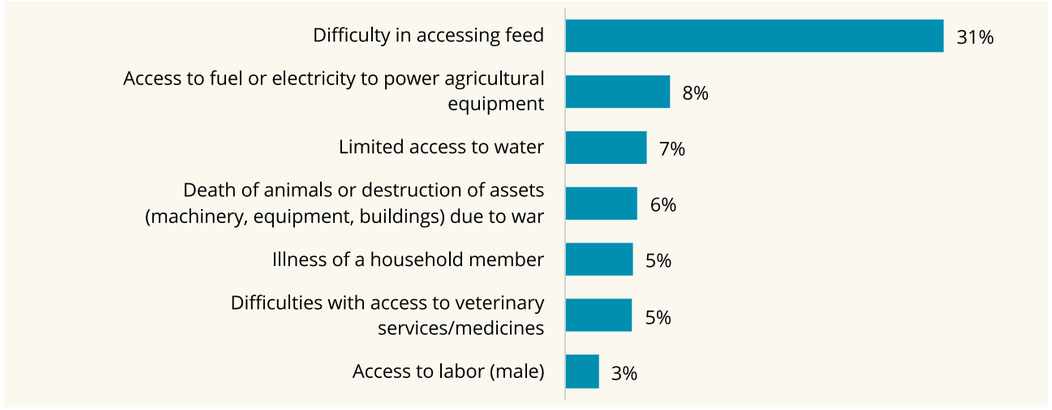
Agricultural households report distinct challenges in crop and livestock production. For crop production, the primary challenge is unfavourable weather conditions, reported by 24 percent of crop producers. Outbreak of diseases and difficulties in accessing inputs like seeds, fertilizers and pesticides are also mentioned by at least a tenth of the crop farmers. Difficulty accessing feed emerged as the most significant challenge to livestock farmers, reported by 31 percent of households engaged in livestock production. Access to fuel or electricity and access to water are also mentioned by at least 7 percent of the livestock producers.

Figure 4.8 Percent of crop farmers by crop production challenges



Source: JFSLA survey 2024

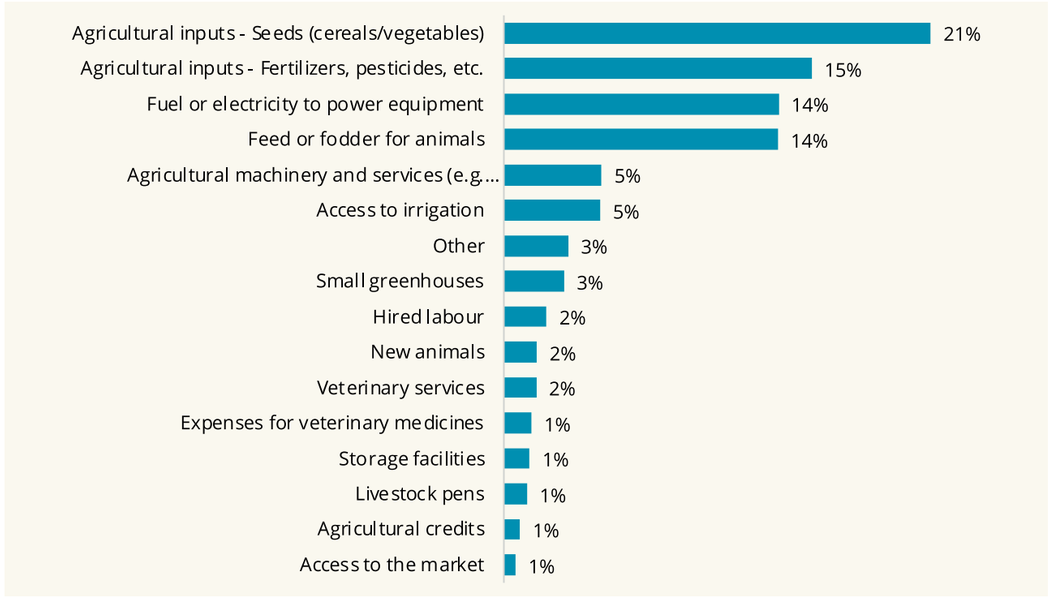
Figure 4.9 Percent of livestock producers by livestock production challenges



Source: JFSLA survey 2024

About 67 percent of agricultural households reported having at least one agricultural need, with agricultural inputs remaining the most pressing. On average, 21 percent of agricultural households identified seeds as their primary need, while fertilizers and pesticides are the main need for 15 percent. While most agricultural households (61 percent) stated that they could buy quality seeds and other inputs within their hromada (administrative unit), 39 percent reported that they could only partially access them or could not purchase them at all. Given that most farmers rely on suppliers and distributors within their oblast (41 percent) or from outside their oblast (25 percent) for these inputs, the war and infrastructural destruction may be disrupting input distribution. For example, access to seeds and other inputs is significantly reduced in areas closer to the frontlines, dropping to 49 percent within 30 km of the frontline compared to 68 percent in areas farther away. Other critical needs include fuel, electricity, and animal feed, which were reported by 15 percent of agricultural households.

Figure 4.10 Percent of agricultural farmers reporting agricultural need



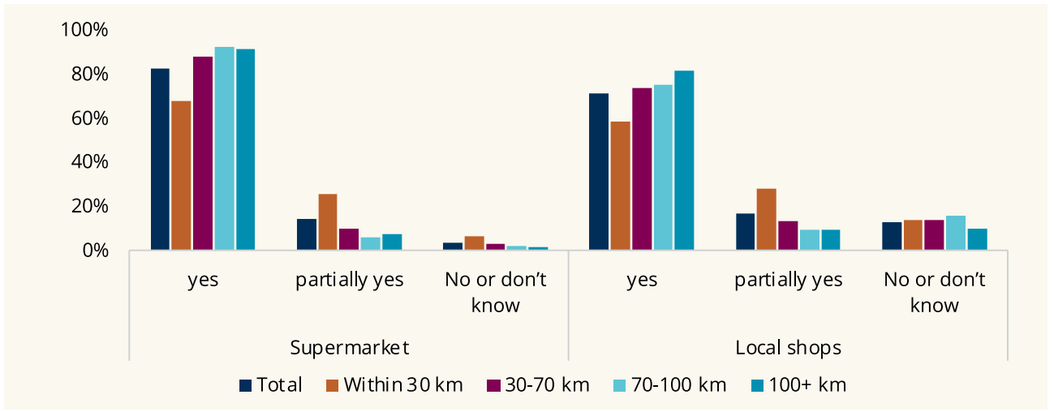
Source: JFSLA survey 2024

Markets and infrastructure

In general, in the surveyed oblasts, food retailers, including supermarkets and local stores, remain operational according to survey respondents. Overall, 83 percent of the households report fully functional supermarkets, and 71 percent report the same for local stores. However, within 30 km from frontline, only over half of households report both supermarkets and local shops as operational, suggesting that the share of operational stores is significantly lower than in areas further away.

About 78 percent of the surveyed households purchase food locally from the local supermarkets and stores, while five percent report traveling to other settlements to purchase food. Other important sources of food include humanitarian aid (five percent), and own stock (12 percent). A significant difference emerges between agricultural and non-agricultural households: 60 percent of agricultural households rely on local stores and 20 percent rely on own stocks, compared to 90 percent of non-agricultural households who rely on the local stores or traveling to other settlements. Higher local prices (57 percent), limited varieties (55 percent) and non-operational stores (19 percent) are the top reasons for travelling to other settlement to purchase food. Within 30 km to frontline, a higher percentage of households (29 percent) report non-operational stores.

Figure 4.11 Percent of households reporting availability of supermarkets and local shops



Source: JFSLA survey 2024

Other infrastructure remains operational but at varying levels. 80 percent of households report the availability of healthcare facilities in their communities. However, within 30 km of the frontline, access to healthcare drops to 70 percent. Educational institutions are less operational. While 34 percent of households report that schools are operational in their communities, only 10 percent of households within 30 km of the frontline have access to functioning educational institutions.

Regarding water access, the share of households relying on private source is high. About half (50 percent) of the surveyed households primarily rely on private taps or bottled water (37 percent) for drinking water, while private taps (52 percent) and private wells (25 percent) are the main sources of technical water. For agricultural activities, most households continue to depend on public electricity (87 percent) for their operations, with some are also using alternative sources such as generators (2 percent) or solar power (3 percent). Urban households report a slightly higher reliance on alternative electricity for agriculture than their rural counterparts.

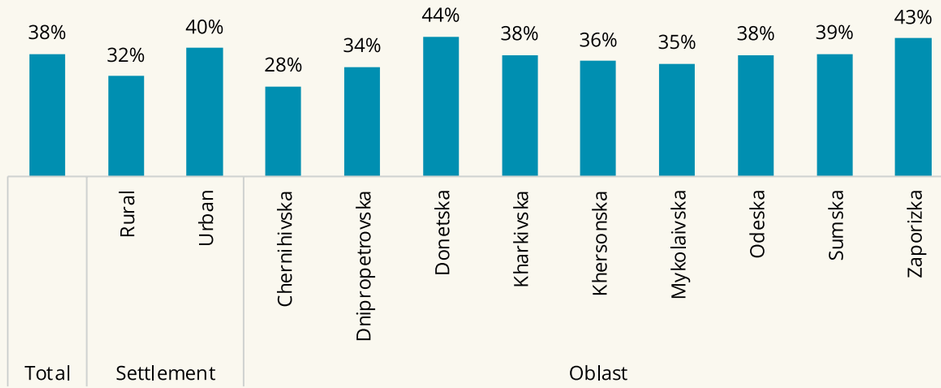
FOOD SECURITY AND COPING MECHANISMS

Household food security

The introduction chapter highlighted how overall food insecurity in Ukraine has worsened significantly since the escalation, and that FLB oblasts are particularly hard hit. This section delves into various aspects of food insecurity at the household level to unpack how this food insecurity manifests and its drivers.

Asked directly about their most pressing need over the coming six months, 38 percent of the surveyed households identify food as their main need, prioritizing it over other essential needs such as medicine and healthcare (36 percent), fuel and heating (24 percent) and clothing (16 percent). Consistent with food and livelihood needs being more pronounced in frontline oblasts, households in these areas are significantly more likely to report challenges in accessing food compared to those in non-frontline oblasts. At the same time, the share of households reporting food as the biggest household need is lower in rural areas (32 percent), compared to 40 percent in urban areas. Amongst the surveyed oblasts, Donetska (44 percent), Zaporizka (43 percent) and Sumska (39 percent) have the highest percentage of households expressing food as a high priority need.

Figure 5.1 Percent of households reporting food as the biggest need in the next 6 months



Source: JFSLA survey 2024

Food security is a multidimensional concept measured using various metrics, capturing different dimensions such as food availability, access, utilization, and stability. Different indicators measured at the household level offer distinct aspects of household food security and can provide useful triangulation. This assessment employs multiple globally recognized measurements to highlight patterns and different aspects of household food security in the assessed oblasts. While the different food security measurements build on different types of questions at the household level, importantly, consistent patterns emerge from the analysis:

- Overall, the share of food insecure households across the assessed oblasts is estimated in the approximate range of about one-fifth to about one-third of all households living in the area. This is significantly higher than the 15 percent People in Need (PIN) estimate for Ukraine in 2025 and aligns with the PIN estimate that nearly a third of the population in the conflict-affected eastern part of the country is in need of food assistance. Unsurprisingly, proximity to the frontline matters - living within 30 km from the frontline zone makes a household significantly more likely to face food insecurity, regardless of how it is measured. Consistent across measurements, only a small proportion (between one-in-nine to one-in-six) of the food insecure households are considered 'severely' food insecure, while the majority fall into the 'moderately' food insecure group.

UP TO 1/3

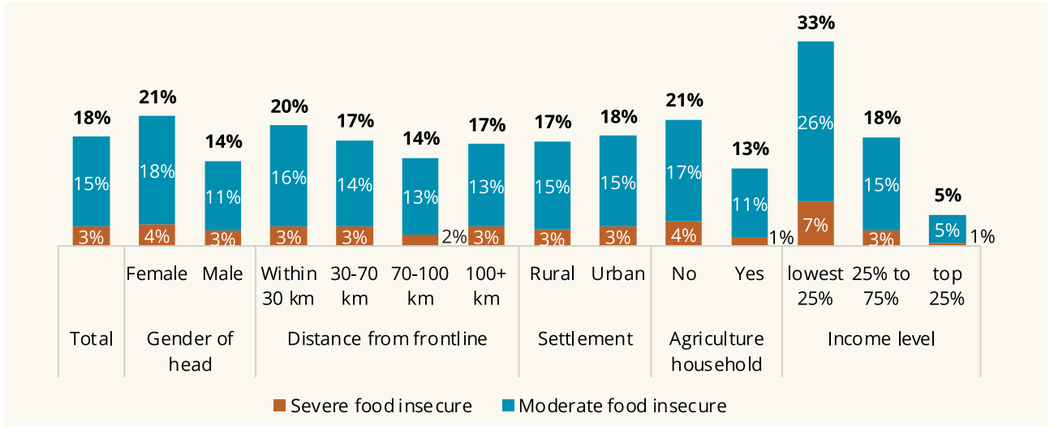
of households are moderately or severely food insecure

- Female-headed households are 50 percent more likely to be food insecure, as compared to their male-headed counterparts, showing that a gender lens on access to food is crucial.
- Being poor significantly increases a household's risk of food insecurity: A household belonging to the poorest 25 percent of surveyed households is 7-8 times as likely to be food insecure compared to a household belonging to the richest 25 percent. This suggests that economic access to food plays a key role in remaining food secure.
- Households in Donetska, and Zaporizka are disproportionately affected by food insecurity. Many areas within these two oblasts remain not under control of the GoU, severely restricting humanitarian access, with those GoU-controlled having the highest proportion of displaced (Zaporizka) and returnee households (Donetska) among the sample. Additionally, agricultural production in these oblasts has been heavily impacted by active conflict, landmines, and the displacement of farming households.

The Food Insecurity Experience Scale (FIES) is a global indicator that evaluates the severity of food insecurity through household survey responses to questions about difficulties in obtaining adequate food. As Sustainable Development Goal Indicator 2.1.2, FIES tracks progress toward achieving SDG 2: Ending Hunger. For this analysis, FIES was calculated using the Rasch model[k]. When measuring food security using the FIES global indicator, findings suggest that almost one in five surveyed households experienced moderate or severe food insecurity in the 30 days prior to the survey. Of these, 15 percent experienced moderate food insecurity, while 3 percent experienced severe food insecurity.

k For more detail on FIES and RASCH model. Link

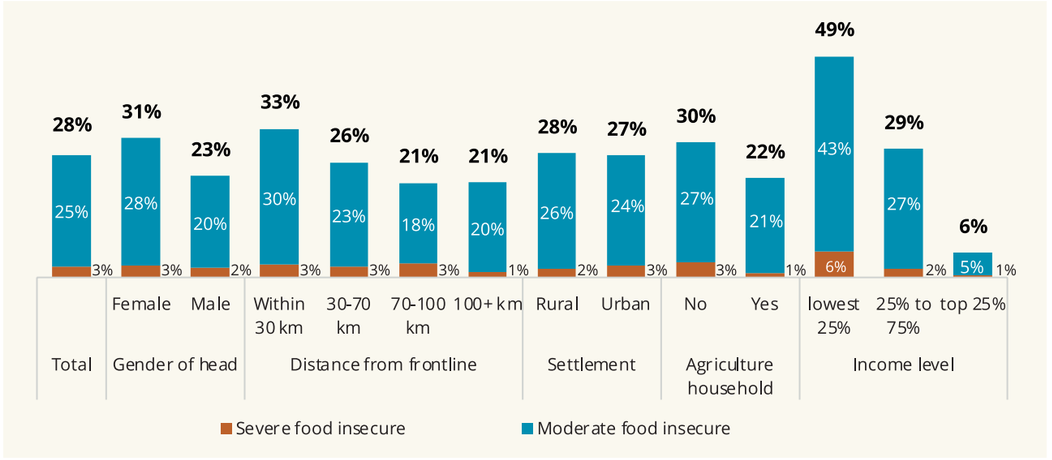
Figure 5.2 Percent of food insecure households, as measured using the FIES indicators



Source: JFSLA survey 2024

Another measurement used in assessing acute food insecurity is the Consolidated Approach for Reporting Indicators of Food Security (CARI). The CARI methodology[l] measures two outcome-oriented domains of food insecurity, namely the current consumption status of households (measured by the indicators food consumption score (FCS) and reduced coping strategies index (rCS)), and the household coping capacity (measured by indicators economic capacity to meet essential needs (ECMEN) and livelihood coping strategies (LCS)). Through these domains, the CARI combines measures of current food consumption with their ability to remain food secure in the future. Using the CARI methodology, the analysis suggests that 28 percent of households are acutely food insecure: 25 percent of households are moderately food insecure, while 3 percent are severely food insecure [m].

Figure 5.3 Percent of food insecure households, as measured using the CARI approach



Source: JFSLA survey 2024

l The CARI methodological approach can be found here. Link

m It is important to note that the definitions of moderate or severe food insecurity in the CARI and FIES methodologies are different both in concept and severity.

As pointed out above, while the different household food insecurity metrics are measured through different types of inquiries at the household level and encompass complementary aspects of food insecurity, and hence do not lead to identical estimates, they are consistently displaying the same patterns across geographies, with regards to household typologies and the relative severity of food insecurity.

Interestingly, there is a non-negligible difference between the share of households who reported food as a priority need and the share of households who are considered food insecure. The difference may arise when self-reported priorities reflect anticipatory concerns, as households in conflict and volatile conditions prioritize food to safeguard against future shortages or price surges. Additionally, subjective perceptions of vulnerability, including the psychological stress of maintaining food security, amplify the emphasis on food as a need[n]. Rising food prices and declining purchasing power also mean that even households with adequate consumption levels may struggle to afford sufficiently diverse and nutritious diets or must compromise on their preferred foods.

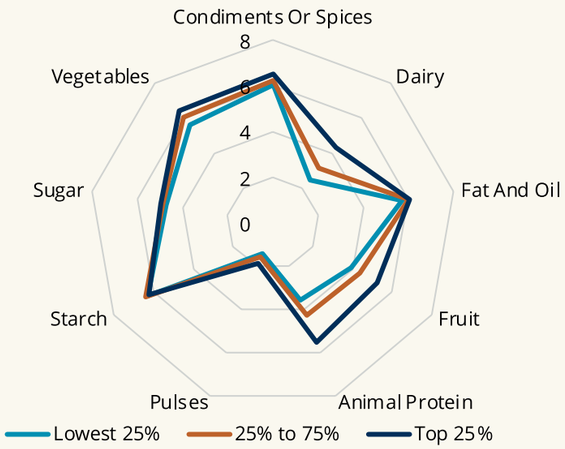
These challenges in affordability and access, coupled with anticipatory concerns translate into difficulties in maintaining dietary diversity. Approximately 45 percent of households reported consuming a limited range of foods, while 31 percent indicated they were unable to access healthy or nutritious meals in the week preceding the survey. The psychological toll of food insecurity is also evident, with more than 30 percent of households expressing worry or uncertainty about their ability to obtain food due to financial constraints. This anxiety adds to the stress from volatile security conditions, particularly for households with children who heavily depend on humanitarian aid.

The inability to maintain dietary quality and variety is further highlighted by household food consumption indicators. For at least 15 percent of households, basic food consumption levels are classified as inadequate, as determined by the Food Consumption Score (FCS) and the Household Dietary Diversity Score (HDDS). The FCS, which assesses food intake over the past seven days, identifies 19 percent of households as having inadequate consumption, while the HDDS, focusing on the past 24 hours, reports a slightly lower figure of 15 percent.

Households' consumption of protein-rich foods (e.g., meat, fish, and eggs) and fruits remains notably low. These items, as shown in the introduction, though highly nutritious, are perishable and have become increasingly expensive due to rising energy costs driven by conflict-related infrastructure damage [23]. Food inflation, coupled with declining household incomes, has turned perishable foods unaffordable for many. The poorest 25 percent and those that have experienced recent income reductions are particularly affected, with limited access to these critical food groups. In contrast, agricultural households, which often produce their own food, exhibit better access to diverse and nutritious options despite broader economic challenges.

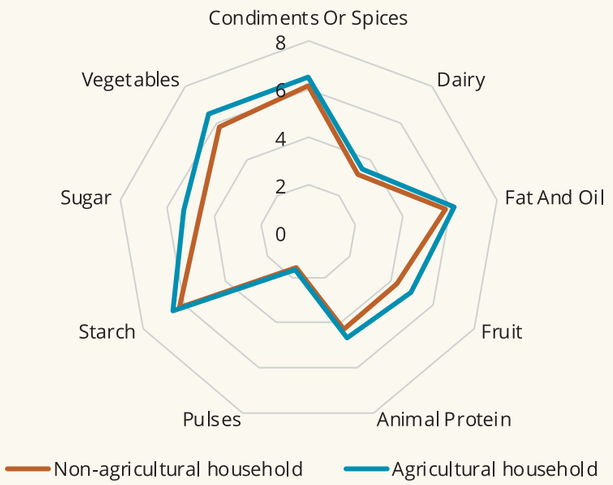
n For instance, a study published in Nature Communications examined the impact of follow-up supportive policies and risk perception on household adaptive measures. The research found that households' perceptions of risk significantly influence their livelihood strategies, leading them to prioritize certain needs, such as food, to mitigate anticipated future challenges. (Yang, X., Qiu, X., Zhu, F. et al. (2024). Follow-up supportive policies and risk perception influence livelihood adaptation of anti-poverty relocated households in ethnic mountains of southwest China. Sci Rep 14, 30008. Link

Figure 5.4 Average number of days household consume food types by income level



Source: JFSLA survey 2024

Figure 5.5 Average number of days household consume food types by livelihood activity



Source: JFSLA survey 2024

Households coping mechanisms

A common coping strategy for households facing financial strain is to cut non-food expenditures, allocating a larger share of their total spending to food due to rising food prices. Nearly half (46 percent) of surveyed households now spend more than 50 percent of their total expenditure on food. According to the State Statistics Service of Ukraine, the average share of food in household expenditure has risen from 50 percent in 2022 to 57 percent in 2024[24]. This trend highlights a critical vulnerability: as food prices rise and incomes remain constrained, households are forced to allocate a growing portion of their limited resources to food, leaving less for other essential needs such as healthcare, education, and housing. This increasing financial burden reflects deepening food insecurity, as higher food expenditure shares often indicate economic distress and reduced

purchasing power.

In the case of the FLB oblast, the top 25 percent income threshold and agricultural households are exceptions, with both groups having better economic or physical access to food compared to low-income and non-agricultural households.

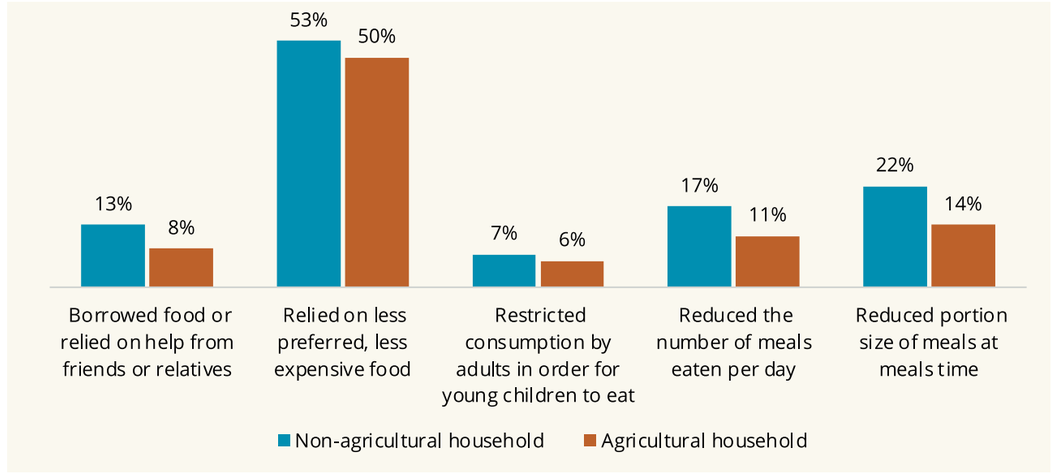
More than half (67 percent) of the surveyed households have limited economic capacity to meet essential needs without humanitarian and government support, as indicated by their expenditures falling below the Minimum Expenditure Basket (MEB). This measure provides a more objective assessment of household vulnerability compared to self-reported ability to cover basic needs or income-based poverty thresholds. It highlights that these households are unable to afford a basic standard of living, even when factoring in all sources of income, reinforcing concerns about financial insecurity and constrained consumption capacity.

Without humanitarian assistance, approximately 91 percent of the poorest 25 percent would have total expenditures below the minimum expenditure basket[o]. This highlights the role of humanitarian assistance in safeguarding the welfare and food security of poor households, particularly in frontline areas. No significant difference is observed between agricultural and non-agricultural households in terms of economic capacity. However, the lower food expenditure share among agricultural households compared to their non-agricultural counterparts illustrates the buffering effect of agricultural production on household food security.

Over half (55 percent) of households employed at least one consumption coping strategy within the past seven days. The Reduced Coping Strategy Index (rCSI) is a tool used to measure these behavioural strategies, reflecting the actions people take when they cannot access enough food or anticipate a decline in food security. A higher rCSI score indicates a greater level of stress and a higher reliance on coping mechanisms. In terms of the coping strategies employed, 26 percent of households reported using high-level coping strategies, while another 26 percent utilized medium-level coping strategies. The most common coping mechanism was relying on less preferred or less expensive food, adopted by 52 percent of surveyed households. Other notable strategies included reducing portion sizes (19 percent) and decreasing the number of meals per day (15 percent). There was no significant variation in coping strategy use based on proximity to the frontline or between rural and urban settlements, but agricultural households tend to apply less of these strategies than non-agricultural households.

o The Minimum Expenditure Basket (MEB) represents the minimum value of the set of goods and services required by a household to meet basic needs over a specific period, typically a month. It is commonly used in humanitarian and development contexts to assess economic vulnerability and determine assistance thresholds. For this report, the MEB of Ukraine and survival MEB as defined by the Ukraine Cash Working Group was set at 6,621 (~USD 160) and 3250 UAH (~ USD 78) per capita per month respectively.

Figure 5.6 Percent of households applying consumption coping by livelihood activity



Source: JFSLA survey 2024

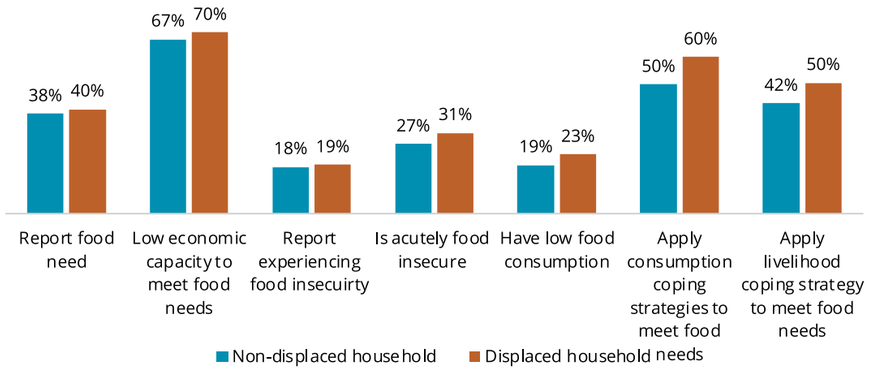
Finally, beyond consumption coping strategies, which are short-term measures, a significant proportion of households have resorted to long-term livelihood strategies because of lack of food. During sudden food shortages or the onset of emergencies, households typically adjust their food consumption patterns, reflecting consumption-based coping. However, when such situations persist or worsen, households increasingly shift toward long-term coping behaviours that can significantly impact their livelihoods and economic stability. In section 4, the Livelihoods Coping Strategy Index (LCSI) was calculated, revealing that 67 percent of households have adopted at least one livelihood coping strategy. Further analysis shows that nearly half (45 percent) of these households applied these strategies specifically in response to food-related challenges. These livelihood coping measures often involve crisis strategies like reducing health or education expenditure, or taking on unsustainable levels of debt, which can have lasting implications for households' future resilience and directly impact human capital formation.

BOX 5.1

The household survey highlights considerable differences in coping behavior between non-displaced and displaced households. A significantly larger share of displaced households (60 percent) employs high or medium levels of consumption-based coping strategies (rCSI), compared to 50 percent of non-displaced households—a 10 percentage point difference. This indicates that displaced households are more likely to rely on distressing measures such as reducing meal sizes or skipping meals to manage food shortages. Long-term coping strategies, such as crisis or emergency livelihood measures, are also more prevalent among displaced households (50 percent) than non-displaced households (42 percent). These strategies often involve actions like reducing health and education expenditure or taking on unsustainable debt, which can erode future resilience and livelihood opportunities.

Overall, the data underlines the compounded challenges faced by displaced households, who not only have higher direct experience with the conflict but also face more challenges in meeting food needs, thus resort to more severe short- and long-term coping mechanisms.

Figure 5.7 Food insecurity metrics of displaced and non-displaced households



Source: JFSLA survey 2024

Determinants of food insecurity

While food insecurity affects many households in the assessed oblasts, as seen above, certain groups are disproportionately impacted. A regression analysis to identify the key correlates of food insecurity was conducted on the two food insecurity measures analysed in this report using a set of explanatory variables grouped into three categories: household sociodemographic characteristics, household location, and livelihood factors. The regression results reveal that sociodemographic factors and livelihoods factors such as having a large family, disabled household member, unemployed household member, being displaced, or amongst the poorest 25 percent, are the key correlates of food insecurity in the assessed areas. These factors exert a significantly stronger correlation on food insecurity compared to location variable.

In terms of livelihood factors, agricultural households in particular exhibit significant better food security outcomes than non-agricultural households. This advantage stems from their reliance on self-subsistence, with many households consuming much of their harvest rather than selling it. Where energy and transportation disruptions severely impact food supply chains, agricultural households are less vulnerable to market shortages and price surges. By producing their own food, they bypass logistical challenges and maintain a stable food supply, acting as a buffer against food insecurity. Nevertheless, agricultural households still depend on markets for seeds and inputs, making them equally susceptible to supply chain disruptions and inflation.

The correlation of location of household (proximity to frontline) becomes less significant when other factors like displacement, unemployment, and income are taken into account. For example, households within 30 km of the frontline show higher levels of food insecurity, but this correlation weakens once livelihood factors are included in the analysis. This suggests that it is not simply living near the frontline that causes food insecurity, but rather the combination of challenges common in those areas, such as limited access to markets and services. These overlapping hardships potentially explain much of the food insecurity that was initially linked to proximity.

To live in FLB oblasts, households facing these challenges—such as those with unemployed members, displaced families, disabled members, or those in the lowest income quartile—require targeted food and livelihood support. Addressing these vulnerabilities is crucial to reducing food insecurity in the FLB oblasts.

Table 5.1 Correlates of food insecurity

	FIES probabilities			CARI score		
	(1)	(2)	(3)	(4)	(5)	(6)
Variables	Sociodemographic	Location	Livelihood	Sociodemographic	Location	Livelihood
Age of head (Base: 18 - 35 yrs.)						
36-59	0.0461***	0.0454***	0.0326**	0.136***	0.129***	0.0647***
	(0.0136)	(0.0136)	(0.0131)	(0.0282)	-0.028	(0.0247)
60+	0.0645***	0.0640***	0.0331*	0.247***	0.239***	0.109***
	(0.0179)	(0.0179)	(0.0175)	(0.0372)	(0.0370)	(0.0329)
Female headed household	0.0634***	0.0637***	0.0412***	0.130***	0.126***	0.0405**
	(0.00889)	(0.00889)	(0.00857)	(0.0184)	(0.0183)	(0.0161)
Household with large family size (3+ children)	0.0682***	0.0700***	-0.00270	0.245***	0.252***	-0.00965
	(0.0192)	(0.0194)	(0.0190)	(0.0399)	(0.0399)	(0.0356)
Household without no working age member	0.0487***	0.0474***	0.0675***	0.0626*	0.0561	0.105***
	(0.0169)	(0.0169)	(0.0165)	(0.0351)	(0.0349)	(0.0311)
Household with single care provider	-0.00127	-0.00180	-0.00940	0.0830***	0.0760***	0.0310
	(0.0138)	(0.0138)	(0.0132)	(0.0285)	(0.0283)	(0.0248)
Rural households		-0.00558	0.00189		0.0761***	0.0501***
		(0.00890)	(0.00914)		(0.0184)	(0.0172)
Distance from frontline (Base: Zone 100+ km)						
Zone 0-30 km		0.00444	-0.0218*		0.186***	0.101***
		(0.0130)	(0.0124)		(0.0268)	(0.0234)
Zone 30-70 km		-0.00253	-0.0144		0.0815***	0.0475**
		(0.0129)	(0.0124)		(0.0267)	(0.0233)
Zone 70-100 km		-0.0360**	-0.0362**		0.00204	0.00480
		(0.0159)	(0.0152)		(0.0328)	(0.0285)
Household has disabled member			0.0460***			0.0801***
			(0.00928)			(0.0174)
Displaced household			0.00365			0.0919***
			(0.0125)			(0.0234)
Household with unemployed member			0.0313**			0.128***
			(0.0140)			(0.0263)
Agriculture household			-0.0868***			-0.179***
			(0.00920)			(0.0173)
Income level (Base: To 25%)						
Lowest 25%			0.232***			0.872***
			(0.0127)			(0.0239)
Medium 25% to 75%			0.101***			0.502***
			(0.0107)			(0.0203)
Constant	0.0736***	0.0807***	0.0339**	1.674***	1.558***	1.305***
	(0.0129)	(0.0167)	(0.0167)	(0.0267)	(0.0344)	(0.0315)
Observations	4,998	4,998	4,998	5,204	5,204	5,204
R-squared	0.026	0.028	0.116	0.041	0.056	0.287

Note: These results are based on a linear probability regression model estimating the likelihood that a household is moderately or severely food insecure. Model 1, 2 and 3, is based on food insecurity result calculated from FIES, while model 4,5,6 is based on CARI score. Model 1 incorporates household sociodemographic factors. Model 2 adds the house's location, and Model 3 includes livelihood characteristics. Models 4, 5, and 6 perform a similar analysis respectively, but use the CARI score instead of FIES. Negative coefficients indicate that a variable decreases the likelihood of food insecurity, while non-negative coefficients indicate otherwise. Standard errors in parentheses, *** p<0.01, ** p<0.05, * p<0.1.

CONCLUSION AND RECOMMENDATION

The war in Ukraine has significantly impacted livelihoods and food security across Ukraine, with the FLB experiencing the most severe consequences. The FLB oblasts have borne the brunt of the direct war impact, with 95 percent of conflict events occurring within these territories, and 70 percent of damage costs are concentrated here. While the economy continues to bear the devastating impact of the war, in the FLB oblasts, the challenges remain severe. This context underscores the immense pressures households in these oblasts endure daily, navigating both physical and economic insecurity.

A quarter of households in FLB oblasts do not have a working-age adult, leaving only elderly members or minors to sustain them. Among working-age individuals, 40 percent—predominantly women—are economically inactive. For 35 percent of households, income is solely dependent on pensions, social benefits, remittances, or humanitarian assistance. Financial insecurity is widespread, with 38 percent of households in debt, most of whom have exhausted their savings and taken on new loans since the onset of the full-scale invasion. Additionally, 67 percent of households lack the economic capacity to meet their basic needs.

The agricultural sector is also under immense strain. Production has declined for 43 percent of agricultural households, with 53 percent of crop farmers and 56 percent of livestock producers reporting rising costs compared to the previous year. A significant 82 percent of agricultural households primarily produce for their own consumption, yet they struggle with limited access to essential inputs such as seeds, feed, and fertilizers due to rising costs.

Food insecurity remains a pressing concern, with an estimated one-fifth to one-third of the households in these oblasts affected. Vulnerable groups, including female-headed households, large families, unemployed individuals, and those in the lowest income bracket, are particularly impacted, facing heightened risks of food insecurity as they struggle to secure stable livelihoods.

The survival and coping strategies adopted by households in the FLB oblasts mirror those seen in conflict-affected countries globally. Three distinct groups have demonstrated varying capacities to cope: households with high incomes, agricultural households, and those dependent on humanitarian assistance. High-income households, representing the top 25 percent of earners, maintain better access to diverse food options due to their economic stability. Agricultural households, representing more than 30 percent of all surveyed households, though not necessarily wealthy, benefit from self-produced food. Other households, around 60 percent rely entirely on cash or in-kind support from government or humanitarian agencies, without which they would be unable to meet basic needs.

Although the coping strategies that households adopt to mitigate the food and livelihood challenges, while essential for survival, come at a cost. The depletion of savings, and accumulation of debt undermine long-term resilience and erode human capital. For agricultural households, challenges such as labour loss due to limited access to inputs, land contamination from mines, and the absence of working-age males—often due to military recruitment—further constrain production.

To foster resilience, households in the FLB oblasts require sustained humanitarian support, extending beyond cash and in-kind food assistance. Specific recommendations include:

1. **Continued and adaptive humanitarian support:** In the face of budget cuts, humanitarian assistance must continue to prioritize the most vulnerable populations, recognizing that many households will continue to face significant challenges in meeting basic needs independently. While existing targeting frameworks prioritize groups such as the unemployed, persons with disabilities, and large families, sustained and adaptive support remains crucial. In areas where livelihoods remain disrupted—especially within a few km to the frontline—many households are unlikely to achieve self-reliance in the near term. Therefore, continued unconditional assistance should be prioritized, particularly for those with limited ability to re-enter the workforce. Support should be provided in a manner that ensures the safety of both humanitarian actors and beneficiaries, with careful consideration of operational risks in frontline areas. Strengthening coordination efforts will further enhance the efficiency and coverage of assistance, ensuring that food security and essential needs remain at the center of humanitarian response.

2. **Strengthening household livelihoods through local food systems support:** This involves supporting initiatives that enhance household livelihoods by strengthening local food systems. This should involve promoting home gardening, small-scale vegetable production, and small-scale livestock and poultry rearing, through the provision of quality seeds, tools, starter kits for poultry or small livestock, and training on sustainable practices, including water-efficient techniques and basic animal care. Furthermore, support could extend to improving household-level food storage and preservation techniques to reduce post-harvest losses. Crucially, this includes facilitating linkages between households and local markets, providing information on market prices and locations, and exploring options for improved market access through collective action.

3. **Support for agricultural households:** While agricultural households have demonstrated resilience in crop and livestock production despite immense challenges, a shift towards capacity-building initiatives is critical. This could involve providing inputs such as quality and adapted seeds, animal feed, and fertilizers, and addressing infrastructural bottlenecks. Distributing these, along with essential farming tools and training on their effective use, helps ensure continued or improved yields and promotes sustainable agricultural practices. Support for livestock-owning families, potentially through cash assistance and vouchers, would enable them to access veterinary care and other essential items. Providing veterinary kits and supporting mobile veterinary services, including vaccinations and basic animal healthcare, and facilitating training on animal husbandry best practices, can help protect livestock health.

4. **Support for rebuilding and reconstruction:** As Ukraine navigates this unprecedented period, the resilience of its people offers a beacon of hope, but challenges remain formidable in the FLB oblasts. With the war entering its fourth year, and talks of a ceasefire are underway, humanitarian organizations also need to anticipate and prepare for different scenarios. Humanitarian strategies should integrate programs for self-reliance, community rebuilding, and rehabilitation of damaged agriculture infrastructure, particularly in the FLB oblasts. This should involve supporting the restoration of irrigation systems and drainage networks, repairing damaged storage facilities (such as grain silos and vegetable storage), and rehabilitating critical agricultural infrastructure like greenhouses and livestock shelters. Support could also include technical assistance in assessing damage and planning for rehabilitation, focusing on building back better and incorporating climate-resilient techniques. Humanitarian support must include development strategies that prioritize improvements in livelihoods, agricultural capacity development, and cash assistance to bridge the gap between survival and stability.

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