

FOOD SECURITY

Food security and access to food in Ukraine

According to the report of KSE (Kyiv School of Economics) dated as of February 2024: Agriculture is a key pillar of Ukraine's economy, significantly contributing to GDP, employment, and exports. Before Russia's 2022 invasion, agriculture accounted for 10% of GDP, 14% of employment, and 45% of export value. Despite war challenges like port blockades, infrastructure attacks, and rising production costs, the sector demonstrated resilience, exporting \$23.7 billion in 2022, only 15% less than 2021. Ukraine is a leading global exporter of sunflower oil, wheat, corn, and rapeseed, supplying vital food resources to regions like North Africa, the Middle East, and Asia. However, the war has exacerbated food insecurity and price volatility worldwide.

In this edition, we focus on Food security and access to food in Ukraine.

Ukraine's agricultural potential

Ukraine's agricultural potential remains underutilized, with yields for key crops like wheat and maize lagging behind European peers. Strengthening agricultural data and statistics is critical for informed decision-making, resource management, climate adaptation, and sectoral development. This study aims to evaluate and enhance Ukraine's agricultural data systems, proposing a framework for better data collection and analysis, especially in war-affected regions, to support post-war recovery and long-term sustainability.

Table 1.

Harvesting of cereals and oil crops (the volume of production, yield, 2019, 2020, 2021). Data exclude the temporarily occupied territory of the Autonomous Republic of Crimea, the city of Sevastopol, and a part of temporarily occupied territories in the Donetsk and Luhansk regions

All Agricultural Holdings Years	Harvesting of Volume of Production, Thousands of Tons (Yield, Tons per ha of the Harvested Area)			
	Wheat	Maize	Soybeans	Winter Rapeseed and Colza (Spring Rapeseed)
1.12.2021	32,719.67 0.464	39,819.37 0.801	3409.34 0.268	2960.08 0.295
1.12.2020	25,276.11 0.388	28,059.99 0.569	2770.93 0.209	2586.35 0.234
1.12.2019	28,851.71 0.425	36,675.78 0.712	3698.71 0.232	3280.32 0.259
1.11.2018	25,070.92 0.382	25,516.52 0.743	4266.6 0.264	2780.67 0.270

The ongoing conflict in Ukraine has significantly disrupted global food markets. On July 17, 2023, UN Secretary-General António Guterres emphasized that food production and availability are being undermined by multiple factors, including conflict, climate change, and rising energy costs. These challenges are particularly acute in Ukraine, where active military operations compound the difficulties of addressing food security. According to the FAO, food security is achieved when all individuals, at all times, have physical, social, and economic access to sufficient, safe, and nutritious food to lead active and healthy lives.

FOOD SECURITY IN TIMES OF WAR

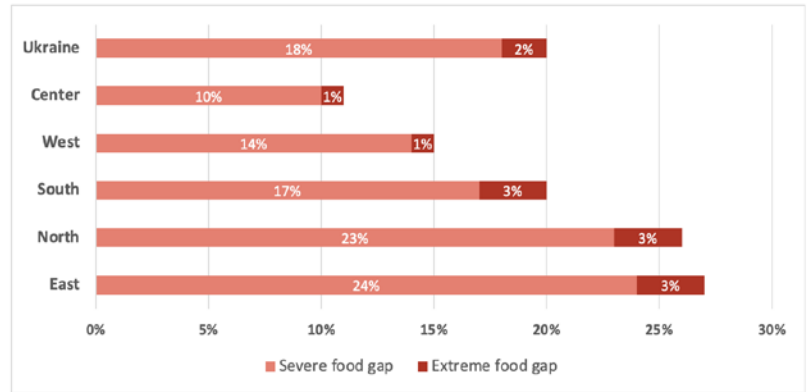
The article by Rob Vos as of April 4, 2024 reports that approximately 7.3 million Ukrainians, or 20% of the population (excluding areas under Russian occupation), experience moderate to severe food insecurity. This includes 1.2 million children and 2 million elderly individuals. The analysis was conducted by the Ukraine Food Security & Livelihoods Cluster, led by the UN Office for the Coordination of Humanitarian Affairs (UN-OCHA) and the World Food Programme (WFP)

Among those affected are about 1 million returning refugees and nearly 1 million internally displaced persons. While Kyiv also has a significant concentration of food-insecure households, the regions most impacted are near the conflict zones in the east and north, where severe food deficits are particularly pronounced.

Ukraine's agricultural potential

The study leverages secondary data to assess the impact of the conflict on food availability in affected regions. Information was collected from reputable organizations, including the Food and Agriculture Organization (FAO), the European Commission, the World Food Programme (WFP), the World Bank, and Ukrainian statistical agencies. This data provides a comprehensive understanding of the severity of grain shortages caused by the war and supports the study's findings with robust evidence.

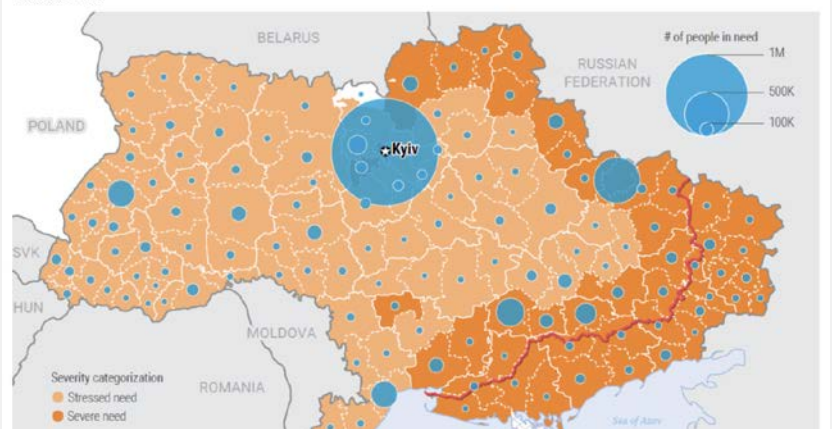
Ukraine: share of households with severe or extreme food security gaps by main regions, October 2023



Food insecurity Ukraine

Ukraine's food insecurity challenges trace back to Russia's 2014 occupation of Crimea and the eastern regions of Donetsk and Luhansk. By the time of Russia's broader invasion in 2022, these regions were already identified as significant food crisis zones in the Global Report on Food Crises, with over 1 million people facing acute food insecurity. The escalation into full-scale conflict in February 2022 caused a dramatic worsening of the food crisis. Ukraine's agri-food sector experienced extensive losses, severely disrupting crop and livestock production and causing ripple effects across global agricultural markets.

Ukraine: 7.3 million people in acute food insecurity and in need of food and livelihoods assistance



KEY STATISTICS AND FACTS

Signs of Economic Recovery

Amid Persistent Agricultural Challenges in 2023

Despite ongoing conflict and persistent Russian bombing campaigns, Ukraine witnessed some economic improvement in 2023. The number of people facing food insecurity dropped by 1.6 million from 2022, declining from 8.9 million to 7.3 million, as reported in the 2024 Humanitarian Response Plan for Ukraine. Macroeconomic indicators also showed progress. Following a sharp 30% contraction in 2022, the real GDP grew by 5.7% in 2023, reflecting partial recovery.

Impact of the War in Ukraine

- The war in Ukraine has had a significant impact on the country, affecting people's living conditions, health, access to education, livelihoods, food security, social status, and more. The Human Impact Assessment report provides an overview of these wide-ranging impacts.
- Ukraine's Plans for the Future To address the challenges caused by the war, the Ukrainian government has outlined plans for 2024-2027, including a focus on adapting healthcare services to new needs, improving vocational education, and continuing to deliver justice services. The Plan 2024 - 2027 document outlines these strategic priorities.
- Global Impact on Food Security The Russia-Ukraine war has had direct and indirect impacts on global food security, disrupting the supply of grains and other agricultural products from these major producers. The paper "Impacts of the Russia-Ukraine war on global food security" examines these far-reaching consequences.

Ukraine: Consumer food price inflation Mar 2019-Feb 2024 (y-o-y; in %)

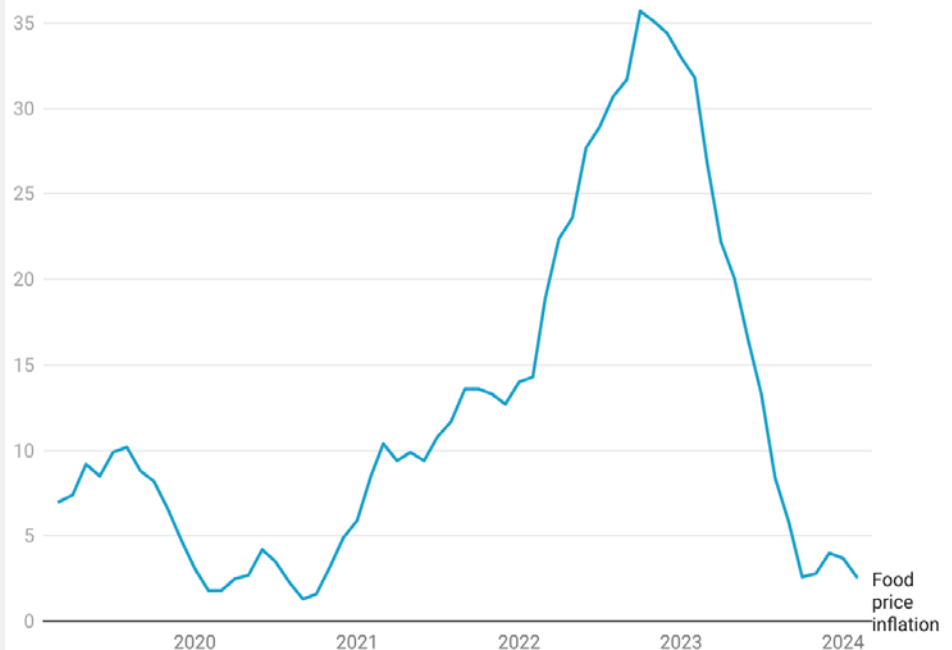
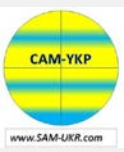


Chart: Rob Vos • Source: Food Security Portal and Trading Economics



SEVERE FOOD INSECURITY

Displacement of people from occupied zones

The war in Ukraine has displaced about 3.7 million people, with half of them coming from the Donetsk and Kharkiv regions, which are either under Russian control or near the front lines. Internally displaced people are facing severe challenges in accessing food due to lost livelihoods and limited humanitarian assistance, especially in areas affected by ongoing conflict. To cope, many of them have resorted to cheaper food options, consuming less, or using savings and selling assets. These coping strategies are also common among households that have not been displaced but are still food insecure.

Despite the war, there has been some economic recovery in 2023. Although the number of food-insecure people remained high, it decreased by 1.6 million compared to 2022, when approximately 8.9 million Ukrainians faced food insecurity. Ukraine's economy rebounded after the sharp recession of 2022, with real GDP growing by 5.7% in 2023. Inflation also decreased significantly, with overall inflation falling to 4-5% annually, and food price inflation dropping from 35% at the end of 2022 to around 3% by February 2024.

Significant challenges in Ukraine agriculture

Despite some improvements, Ukraine still faces significant challenges in its agriculture and broader economy, which will likely continue to threaten food security for years to come. The ongoing war continues to disrupt the economy, particularly the agrifood sector, with air and ground attacks on civilians and critical infrastructure impeding most economic activities. The damage to infrastructure—such as homes, energy grids, dams, ports, and storage facilities—is severely affecting food availability in markets and diminishing livelihood opportunities.

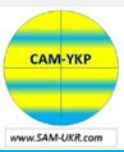
A particularly devastating incident was the destruction of the Kakhovka Dam in eastern Ukraine in June 2023, which many experts attribute to Russian forces, though Russia has denied responsibility. The flooding caused by this attack resulted in the deaths of dozens of people across 46 towns and villages, forced thousands to flee their homes, and destroyed a significant portion of the region's agricultural infrastructure.

War and peace talks

A survey released on November 12, based on computer-assisted telephone interviews in Kyiv-controlled territories conducted in late September and early October, found that 88% of Ukrainians believe Ukraine will win the war. This figure, while lower than 98% in June 2022, has remained steady since February 2024.

Similar findings were reported by Ukrainian pollsters. The Kyiv International Institute of Sociology (KIIS) survey from September-October 2024 revealed that 81% of Ukrainians believe victory is possible with adequate Western support, though 14% now feel Russia is too strong—up from 7% in December 2023.

Another survey by the Ilko Kucheriv Foundation "Democratic Initiatives" and the Razumkov Center in August showed strong resistance to capitulating to Russia's territorial demands. Only 9% of Ukrainians would accept recognizing occupied territories as Russian for peace (up from 5% in August 2023), while 81% still consider it unacceptable (down from 90% in August 2023).



PEOPLE'S PERCEPTIONS ABOUT FOOD SECURITY

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As for the expectations of Ukrainians, many are uncertain about the future

In the face of these hardships, Ukrainians are largely focused on survival and rebuilding, with many relying on humanitarian aid and local solutions to meet their needs. There is an expectation that international assistance and reforms within Ukraine will eventually lead to recovery, but the path forward remains uncertain as the war continues.

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