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Food security and agricultural livelihoods assessment

July 2025

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Abbreviations

CATI	computer-assisted telephone interviews
FAO	Food and Agriculture Organization of the United Nations
FIES	Food Insecurity Experience Scale
FSLC	Food Security and Livelihoods Cluster
GDP	gross domestic product
HDDS	household dietary diversity score
HHs	households
IDPs	internally displaced persons
IMF	International Monetary Fund
KIIS	Kyiv International Institute of Sociology
LCSI	livelihood coping strategies index
MOE	margin of error
MSNA	multi-sectoral needs assessment
PiN	people in need
RDNA	Rapid Damage and Needs Assessment
SAR	State Agrarian Registry
UAH	Ukrainian hryvnia
USD	United States dollar
UXO	unexploded ordnance

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Executive summary

This assessment provides a critical analysis of the current state of food security and agricultural resilience across Ukraine's war-affected regions, serving as a foundational evidence base for 2025–2026 humanitarian and developmental programming. The evidence generated through this assessment also served as a key analytical foundation for the **Emergency and Early Recovery Response Plan for 2026–2028 for Ukraine**, informing its strategic direction and response framework. The findings show a complex context where, despite the profound disruptions caused by the war, subsistence agriculture remains a vital lifeline for 86 percent of producing households, providing a critical buffer against market volatility and food deprivation. However, this resilience is under increasing strain due to a combination of shrinking incomes, limited access to essential inputs, and the widespread use of unsustainable coping strategies among the most vulnerable groups, including internally displaced persons (IDPs), frontline communities and women-headed households. By quantifying the direct link between war-related shocks and food insecurity, this report provides the technical justification required for transition from emergency aid to targeted, livelihood-strengthening interventions that protect both household self-sufficiency and the broader integrity of Ukraine's agrifood systems.

Key highlights

Subsistence farming remains a key practice, with 86 percent of households producing for self-consumption

A total of 40 percent of surveyed households are engaged in agricultural production, with 86 percent of them doing so primarily for self-consumption – a trend consistent with findings from 2023 and 2024. This drive for self-sufficiency is widespread, including among urban households, 45 percent of which rely on private plots for food production. While engagement in agricultural activities dips from 41 percent to 35 percent near the frontline, the most striking divide is generational: 46 percent of households headed by individuals over 60 participate, compared with just 28 percent of those aged 18–40.

Involvement in agriculture serves as an important buffer against food insecurity

Households engaged in agriculture consistently achieve better food security outcomes. This pattern, observed in previous assessments from 2023 and 2024, is confirmed again in 2025 across three key food security metrics:

- Food Insecurity Experience Scale (FIES): agricultural households report fewer experiences of food deprivation;
- Household dietary diversity score (HDDS): diets are more diverse and nutritionally adequate; and
- Livelihood Coping Strategies Index (LCSI): reliance on negative coping mechanisms is significantly lower.

Agricultural engagement strengthens household self-sufficiency by providing a direct source of food, thereby reducing exposure to price volatility and market disruptions. This combination of better dietary access and reduced economic vulnerability underscores agriculture's role as a crucial buffer against both food insecurity and broader economic shocks.

Agricultural households are facing a challenging financial reality of static and shrinking incomes

Widespread financial vulnerability is evident in frontline areas, where households depend heavily on social support: 42 percent rely on pensions and 36 percent on other benefits as their primary income, while 3 percent report having no income at all. This precarious situation has intensified over the past year, with one in three households experiencing a decline in earnings. Income declines were reported by 48 percent of households, the primary income of which comes from agriculture, a substantially higher share compared with 32 percent among those relying on other sectors, underscoring the sensitivity of market-based farming to price volatility and broader economic instability. Conversely, subsistence farming provides a critical non-monetary safety net by ensuring direct access to food. Households that combine subsistence farming with reliable, non-market cash transfers demonstrate greater resilience, as this diversified strategy reduces exposure to both market shocks and income fluctuations. These findings highlight the central role of subsistence agriculture in strengthening household resilience in war-affected areas.

Exposure to socioeconomic and war-related shocks significantly worsen food security outcomes

Households living near the frontline are far more exposed to a range of livelihood shocks, including violence, active hostilities, insecurity and socioeconomic instability. This exposure has a direct and measurable impact on food security: households reporting even one recent shock are significantly more likely to face moderate or severe food insecurity. This clear link shows the urgent need for targeted support to improve food security outcomes for the most vulnerable groups: those in frontline areas, women-headed households and IDPs.

Widespread use of unsustainable coping strategies erodes household resilience

Over 75 percent of the surveyed households have resorted to coping strategies to manage financial hardship. The most common actions include spending savings, borrowing money, seeking additional income, and reducing essential expenditures such as those for health and education. IDPs are significantly more likely to rely on these emergency measures compared to permanent residents. While such strategies may help households maintain food security in the short term, they are unsustainable. Without targeted support, continued reliance on negative coping strategies will deplete household resources, weaken their ability to absorb future shocks, and ultimately erode their long-term resilience.

Declining production and limited access to inputs highlight the urgent need for targeted support to small-scale producers

Small-scale agricultural production is declining under the weight of severe, interlocking challenges. Producers consistently report limited access to essential inputs like seeds, fertilizer and animal feed, alongside the constraints imposed by mine contamination and region-specific issues, including the critical need for irrigation in Khersonska oblast or machinery in Kharkivska oblast.

The impact on agricultural output has been severe. In crop production, on average nearly one-third (30 percent) of producers reported smaller harvests, a figure that rises sharply to 45 percent in the heavily affected Khersonska oblast. A parallel crisis grips the livestock sector, where 20 percent of surveyed producers reported losing animals because of the war. Among surveyed evacuees, 70 percent had to abandon their livestock when fleeing their homes. Targeted assistance is therefore critical to help producers mitigate these challenges, stabilize production, and ultimately support household food security and resilience.

Vulnerable groups face amplified risks from compounding crises

Three population groups consistently emerge as the most vulnerable: IDPs, households near the frontline and those headed by women. These groups experience a compounding set of challenges, consistently showing higher levels of food insecurity, more frequent exposure to shocks, and a greater reliance on damaging coping strategies, all while surviving on precarious incomes. Given the scale and persistence of these disadvantages, targeted assistance is not just beneficial but essential to strengthen their resilience and protect their livelihoods against multiple, overlapping shocks that threaten their livelihoods.

Action points for programming

Future programming must prioritize the stabilization of small-scale production by ensuring timely access to critical inputs – such as seeds, animal feed and fertilizers – while simultaneously scaling up “Cash+” interventions that combine financial assistance with agricultural support to prevent the further depletion of household assets and savings. Interventions should be geographically and demographically targeted, focusing on the specific needs of frontline communities (such as irrigation in Khersonska oblast or machinery in Kharkivska oblast) and the unique vulnerabilities of women-headed households and IDPs. Furthermore, integrating agricultural mine action with livelihood support is essential to safely restore productive land, while fostering the transition from subsistence to market-integrated farming will be key to ensuring the long-term economic recovery and resilience of rural Ukraine.

Context

Ukraine's socioeconomic stability remains compromised as the ongoing war generates profound consequences for food security and livelihoods. Continued hostilities, the widespread destruction of agricultural assets, and repeated attacks on critical energy infrastructure have exhausted household resilience. While the economy has absorbed the shock of the 2022 contraction, full recovery is distant, with real gross domestic product (GDP) not expected to return to pre-war levels before 2030. Consequently, the reality for many is defined by a 49 percent surge in food costs between 2022 and 2024, entrenching high poverty levels through 2025. In 2026, humanitarian needs will remain immense; the Ukraine Humanitarian Needs and Response Plan 2026 (HNRP) estimates that 10.8 million people will require assistance.[1] Within this framework, the Food Security and Livelihoods Cluster (FSLC) identified 2 million individuals. Approximately 6.3 percent of the population is identified as a priority target, with the most acute needs concentrated in frontline oblasts.

This persistent instability shows the need for granular data to guide humanitarian interventions. Understanding how macroeconomic trends, such as inflation and GDP stagnation, translate into household-level food insecurity is essential for effective targeting. The current assessment seeks to bridge this gap by examining not only the scale of needs but also the coping mechanisms families are forced to adopt. As households exhaust their savings and sell off assets to afford basic food baskets, the risk of irreversible livelihood erosion increases, making the distinction between temporary economic shock and chronic food insecurity a vital focus for future programming.

The depth of the agricultural crisis driving this insecurity is quantified by findings from the **Fifth Rapid Damage and Needs Assessment**, conducted by the Government of Ukraine and the World Bank, covering the period from February 2022 to December 2025. The assessment estimates total direct damage to the agricultural sector at USD 12.1 billion, while cumulative losses have reached a staggering USD 78 billion. Together, the damage and loss have constrained access to agricultural goods and inputs, particularly in the frontline oblasts. These effects have led to lower production levels, rising input costs, and greater market uncertainty, underscoring priority needs for restoring critical productive assets and for addressing access and liquidity constraints in priority regions and vulnerable producer groups.[2]

The destruction of this physical capital has a cascading effect on the availability and affordability of food in local markets. When storage facilities are destroyed, farmers lose the ability to preserve their harvest, leading to forced early sales at lower prices or significant post-harvest losses. Similarly, the loss of machinery directly reduces the efficiency of planting and harvesting operations, lowering overall yields. This systemic degradation of the agricultural base means that even in areas where food is physically available, the cost of production and thus the final retail price remains prohibitively high for vulnerable consumers, directly linking sectoral damage to the rising household-level challenges.

These macrolevel damages disproportionately impact rural households and small-scale farmers, who historically contribute nearly half of Ukraine's domestic agricultural output. Unlike large agribusinesses with diversified logistics and financial buffers, these households are critically exposed to soaring input costs particularly for fertilizer, fuel and seeds, which have risen sharply since 2022. In frontline oblasts, this economic pressure is compounded by severed access to local markets and processing facilities, forcing many producers to scale down operations or shift to subsistence farming. The inability to sell surplus produces deprives rural families of essential income, driving a cycle of asset depletion where productive livestock and machinery are sold off merely to meet immediate basic needs.

This shift toward subsistence farming is further imperilled by the degradation of the natural resource base. Without access to quality inputs or veterinary services, smallholders face declining productivity in both crop and livestock sectors. This assessment shows that for many rural households, the backyard plot is no longer just a supplement to income but the primary source of nutrition. Consequently, any threat to this production, whether from economic barriers or physical destruction, poses an immediate risk of food insecurity, shifting the crisis from one of economic access to one of physical food availability.

Beyond economic constraints, the widespread contamination of agricultural land with mines and unexploded ordnance (UXO) represents a formidable structural barrier to recovery. Assessments indicate that approximately 25 percent of the country's land mass requires survey for potential clearance, with the most fertile productive zones in the south and east heavily affected.[3] For farmers, this contamination renders vast tracts of arable land inaccessible, directly reducing the 2025 harvest potential and posing lethal risks to those attempting to cultivate. The high cost and technical complexity of demining agricultural plots mean that without sustained international support, significant land will remain fallow, delaying the restoration of rural livelihoods for years and dampening long-term agricultural GDP growth.

The presence of landmines also disrupts the social fabric of rural communities, preventing the safe return of displaced populations who rely on agriculture for their survival. As fields remain dangerous, the labour force required for seasonal work is scarce, creating a bottleneck that hinders agricultural rehabilitation even in areas where the Ukrainian Government regained control. This assessment confirms that land contamination acts as a "hard constraint" on recovery; regardless of seed or fertilizer availability, livelihoods cannot be restored until the land is verified as safe, making mine action a prerequisite for food security interventions.

The crisis's broader demographic shifts further compound these production and livelihood vulnerabilities. According to the estimates of the International Monetary Fund, Ukraine's population contracted from

41 million in 2021 to approximately 33.3 million in 2024, a decline driven by mass displacement, migration and war-related mortality.[4] Additionally, roughly 3.7 million people remain internally displaced, placing sustained pressure on host communities and local social protection systems.[5]

The reduced population significantly alters the demand and labour dynamics within the food system. The exodus of working-age individuals has left many rural households with high dependency ratios, often headed by older or single caregivers who struggle to maintain agricultural activities. Simultaneously, the influx of IDPs into safer regions has strained local food supplies and social services, creating pockets of vulnerability in previously stable areas. This demographic restructuring necessitates a flexible response strategy that accounts for the specific needs of both those who remain in war-affected areas and the host communities supporting them.

Addressing this multidimensional crisis requires looking beyond immediate relief, as the war continues to severely disrupt agricultural production capacity, market functioning and rural livelihoods. Supporting sustainable recovery will demand targeted interventions to restore local food production, rehabilitate productive infrastructure, and accelerate humanitarian demining efforts. Restoring these assets and re establishing value chain linkages are essential steps to stabilizing food security, strengthening smallholders resilience, and ultimately enabling households to rebuild their self-reliance.

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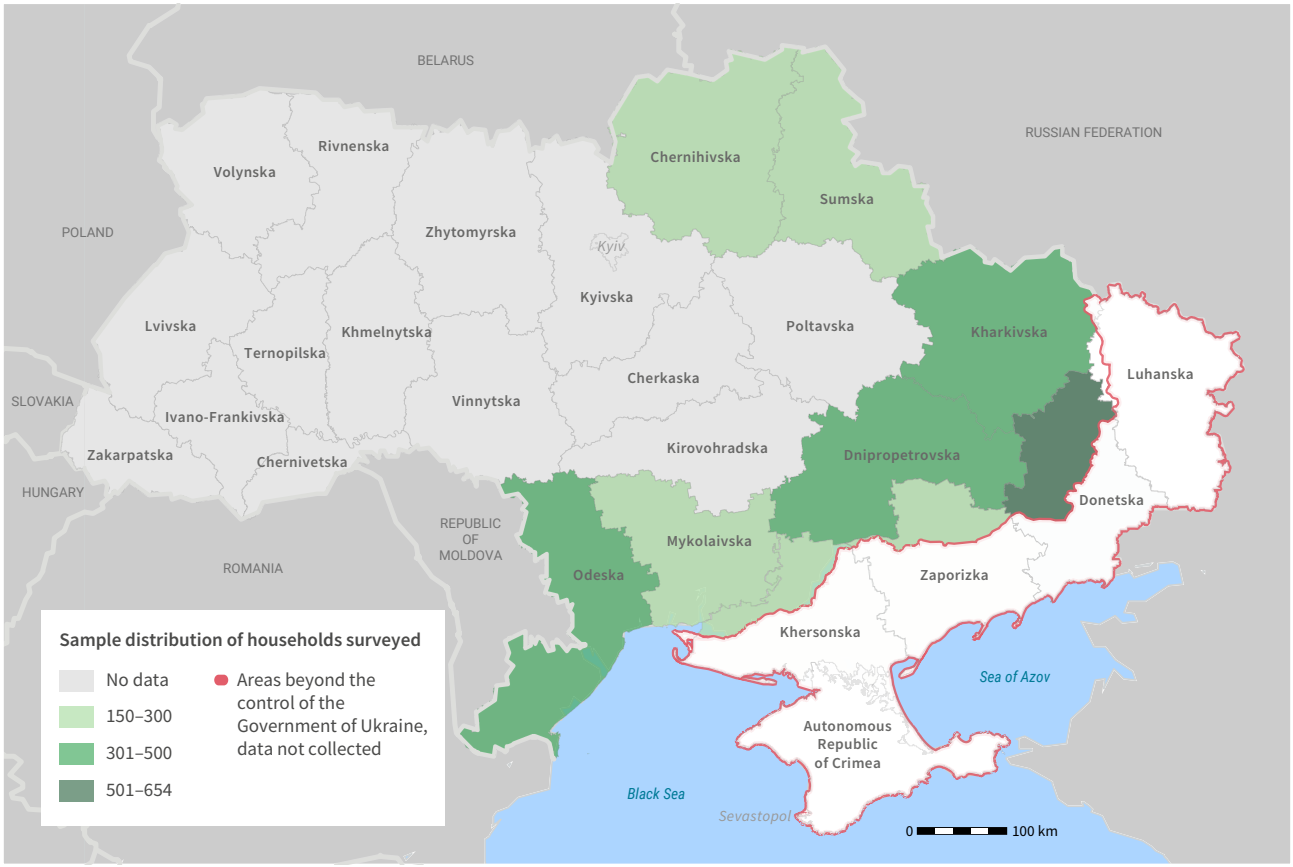
Methodology

In July 2025, FAO and FSLC in Ukraine executed a specialized assessment of household food security and agricultural livelihoods. This initiative aims to bridge critical evidence gaps and refine current analytical frameworks. While the FSLC traditionally utilizes multisectoral needs assessment data for people in need calculations and severity mapping, livelihood-specific indicators have been insufficiently represented in prior severity analyses. Therefore, this assessment introduces enhanced indicators and methodological rigor to improve the longitudinal relevance of food security monitoring within Ukraine's dynamic operational context.

Sampling design and coverage

The sampling strategy employed a stratified random sampling approach designed to generate representative data for households across nine frontline oblasts controlled by the Government of Ukraine: Chernihivska, Dnipropetrovska, Donetska, Kharkivska, Khersonska, Mykolaivska, Odeska, Sumska and Zaporizka oblasts. The geographic distribution of the sample and the number of responses by oblast are presented in Figure 1, while the distribution of the sample across these oblasts is detailed in Table 1.

Figure 1. Sampling locations and number of responses



Note: Refer to the disclaimer on page ii for the names and boundaries used in this map. Red line represents approximately the territories currently beyond the control of the Government of Ukraine. **Source of data:** Authors' own elaboration. **Source of map:** United Nations. 2023. Map of Ukraine. In: *United Nations Geospatial*. [Cited 26 February 2026]. https://www.un.org/geospatial/content/ukraine-0

The sampling design was based on the following key parameters:

- Stratification: the sample is representative at the oblast level with a 95 percent confidence level and a 10 percent margin of error.
- Weighting: post-stratification weights were applied during the analysis phase to correct disproportionate sampling probabilities across strata and align urban/rural distributions with population parameters.
- Limitations: data collection was excluded from the areas beyond the control of the Government of Ukraine, encompassing the entirety of Crimea and Luhanska oblast, as well as some territories within Donetska, Khersonska and Zaporizka oblasts.

Data collection protocol fieldwork was conducted from 1 to 25 July 2025, utilizing computer-assisted telephone interviews administered by the Kyiv International Institute of Sociology. Given the high mobile penetration rate in Ukraine, respondent selection utilized Random DigitDialling. The survey instrument, deployed via the Kobo Enketo web application, consisted primarily of closed-ended questions targeting household demographics, income profiles, economic shocks, agricultural livelihood systems (crop/livestock) and assistance preferences. Quality assurance and analysis data quality was rigorously maintained through a multistage validation process:

- Training: a two-day intensive workshop familiarized enumerators with the survey instrument, thematic definitions and standard enumeration protocols, culminating in a one-day pilot testing phase.
- Monitoring: continuous interim data quality checks were performed throughout the collection phase. These checks monitored response incoherence, excessive non-response rates (“don’t know”/”refused”), outlier anomalies and enumerator bias.
- Validation: the final dataset underwent a comprehensive cleaning process using standardized syntax scripts to ensure logical consistency; no critical quality deviations were identified.
- Analysis: statistical analysis was performed using Microsoft Excel and SPSS version 29, incorporating the calculated weights to ensure accurate population inferences.

Table 1. Sampling distribution

Stratum (oblast)	Total completed interviews	Rural sub-sample realized	Total target achievement	Rural target achievement
Chernihivska	311	156	100%	101%
Donetska	311	156	100%	101%
Dnipropetrovska	336	156	108%	101%
Kharkivska	321	155	104%	100%
Khersonska	323	161	104%	104%
Mykolaivska	319	159	103%	103%
Odeska	326	155	105%	100%
Sumska	315	160	102%	103%
Zaporizka	312	155	101%	100%
Total	**2 874**	**1 413**	**103%**	**101%**

Source: Authors’ own elaboration.

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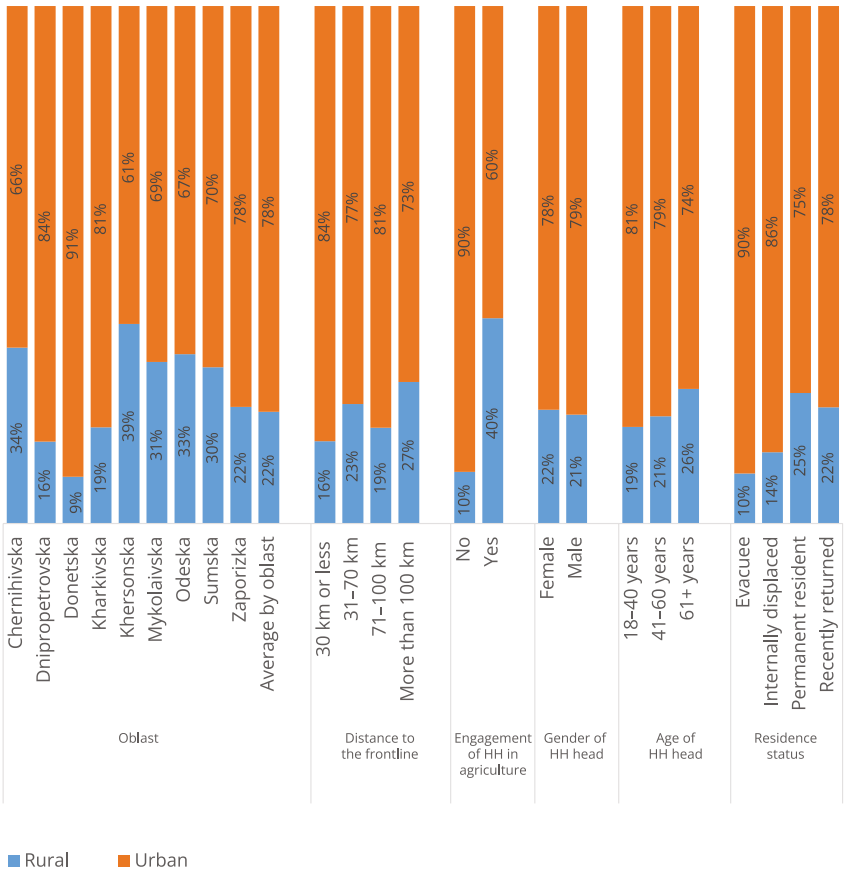
Socioeconomic, demographic and livelihood profile of households

Household demographic and geographic profile

The demographic and geographic profile of surveyed households sets the scene for interpreting livelihood patterns and vulnerability across the assessed areas. The sample is predominantly urban (78 percent), yet the urban-rural balance varies sharply by oblast: Donetska oblast is the most urbanized (91 percent) alongside Dnipropetrovska (84 percent), while Khersonska and Chernihivska retain sizeable rural populations (39 percent and 34 percent, respectively). At the same time, livelihoods do not fall neatly along geographic lines – 30 percent of urban households report having private agricultural plots, showing a growing peri-urban dimension to household production. Households with agricultural activities are dramatically more rural (40 percent) than those without (10 percent), showing agriculture is still strongly rooted in rural areas even though the overall sample is mostly urban (Figure 2).

Figure 2. Urban-rural distribution of households by oblast and key demographic characteristics

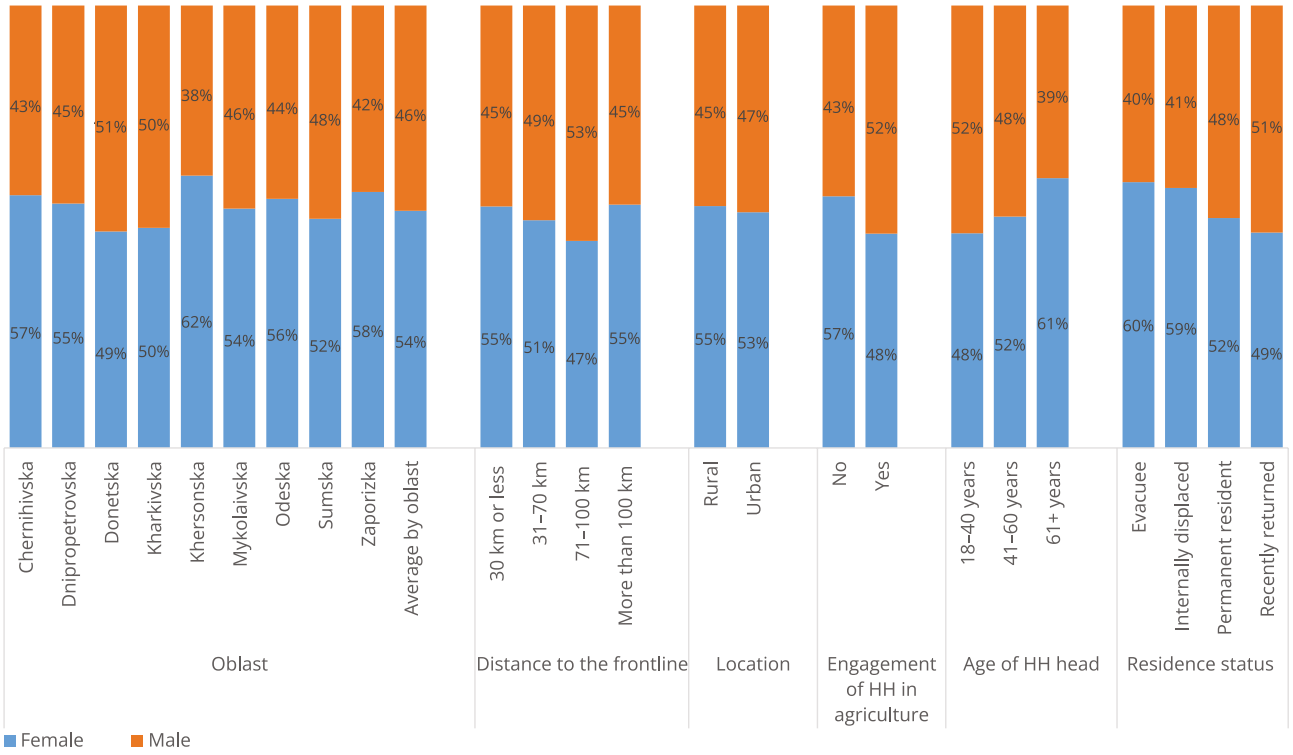


Source: Authors' own elaboration.

Household headship patterns reveal a clear gender imbalance that varies by age, displacement status, livelihood profile and oblast. As shown in Figure 3, female-headed households outnumber male-headed households across all categories, and the gap is largest among households with heads aged 61 and above (61 percent of households are women-headed).

Female headship is most prevalent in Khersonska oblast (62 percent) and among displaced populations, particularly evacuees (60 percent) and IDPs (59 percent). Conversely, male headship is more common among younger cohorts (52 percent of those aged 18–40), returnees (51 percent) and agricultural households (52 percent), with Donetska oblast being the only region reporting a male majority (51 percent).

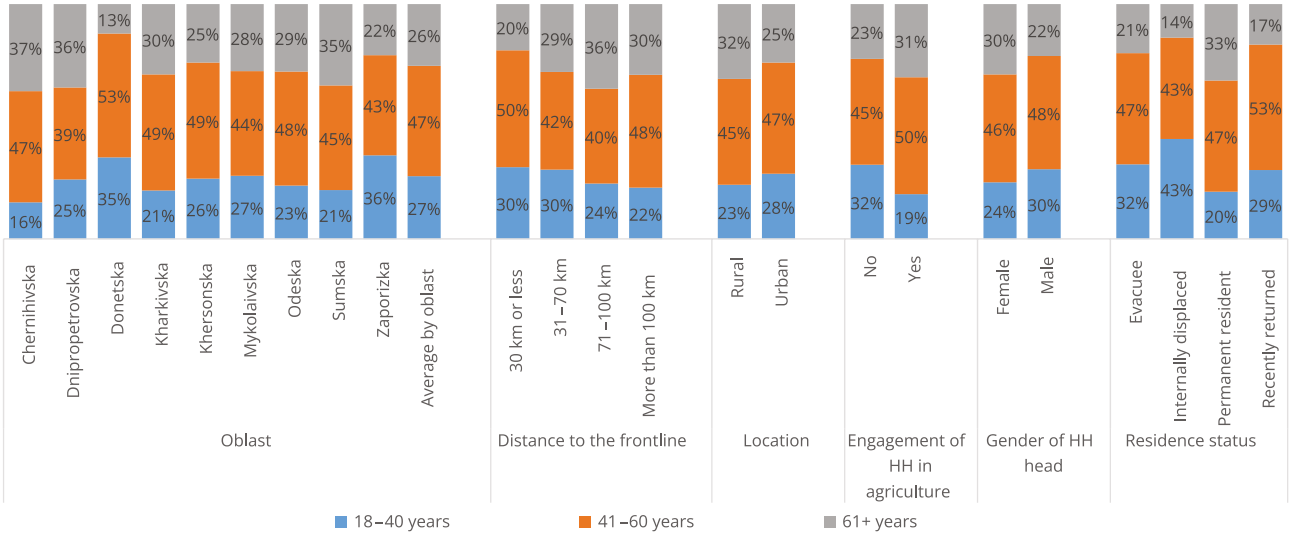
Figure 3. Gender of household heads by oblast and key household characteristics



Source: Authors' own elaboration.

Household head age provides a simple but powerful lens on demographic pressure, capturing sharp age differences across regions and population groups. As Figure 4 shows, household headship is predominantly concentrated among individuals aged 41–60 (47 percent), although age profiles vary substantially by region and population status. A distinct aging demographic characterizes permanent residents (33 percent of household heads aged 61 and above) and rural agricultural households (31–32 percent of household heads aged 61 and above), with Chernihivska oblast reporting the highest proportion of households heads over the age of 60 (37 percent). Conversely, younger household heads (18–40) are concentrated among IDPs (43 percent) and households located in high-risk frontline zones (30 percent), contributing to younger demographic profiles in oblasts like Donetska and Zaporizka. Gender further stratifies these trends, as female heads are significantly older, with 30 percent aged 61 and above, compared with 22 percent among male household heads. This creates a critical recovery challenge: agricultural livelihoods increasingly depend on an aging, immobile workforce, while economically active younger populations are either displaced or concentrated in the most volatile areas.

Figure 4. Age distribution of household heads by oblast and key household characteristics



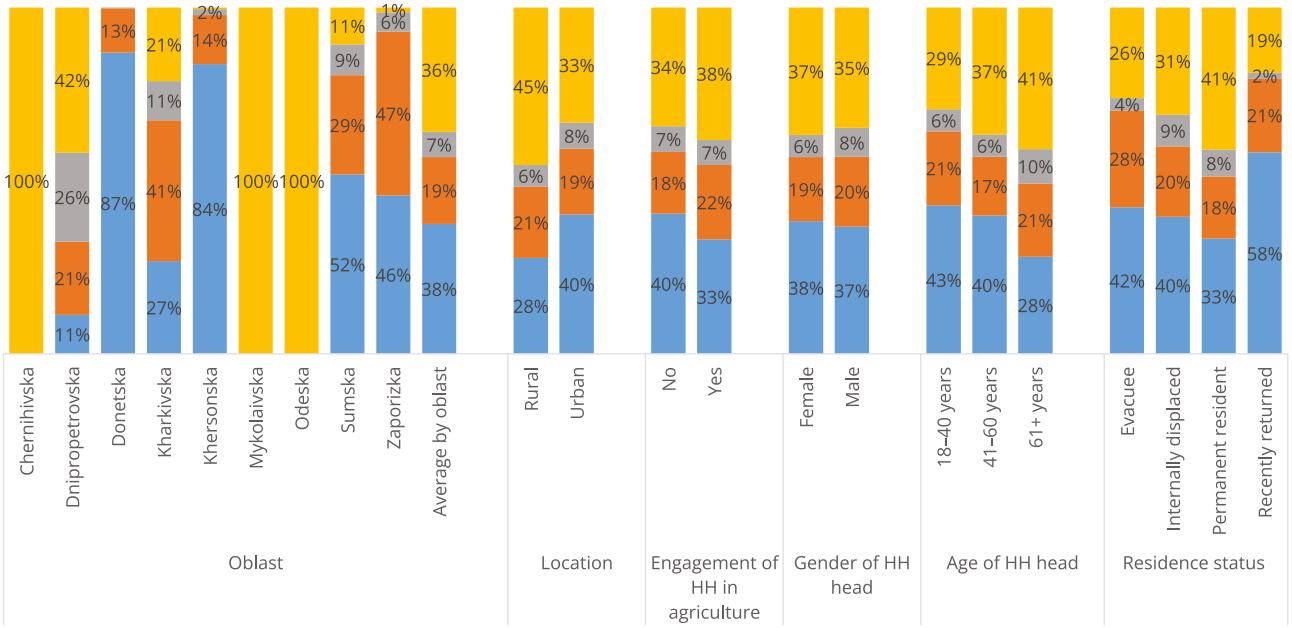
Source: Authors' own elaboration.

These demographic pressures are further reflected in household composition, which reveals how much informal support is available within the home. Households average just 2.8 members, and nearly half consist of only one (18 percent) or two (29 percent) people, while large families (5 or more members) are uncommon (12 percent). This fragmentation, driven in part by by household heads aged 61 and above living alone, suggests weakened family support networks and greater reliance on external assistance, highlighting the importance of well-targeted social protection measures.

Displacement and residence status

Proximity to the frontline is a defining part of the household operating environment, shaping day-to-day risk, mobility decisions and access to livelihoods. As shown in the Figure 5, households face critical exposure to war-related risks, with 38 percent residing within 30 km of the frontline. Regional risk is polarized: Donetska (87 percent) and Khersonska (84 percent) oblasts have the highest concentrations in the immediate frontline zone, while Chernihivska, Mykolaivska and Odeska oblasts are reported entirely outside the 100 km range. Exposure to war-related impacts is higher among urban households than among rural households, as 40 percent of urban households reside within 30 km of the frontline, compared with 28 percent of rural households. Exposure correlates strongly with mobility; recent returnees are the most at-risk group, with 58 percent living within 30 km of the frontline. Consequently, younger household heads (18–40) are far more likely to reside near the frontline (43 percent) than older household heads (aged 61 and above), suggesting that the working-age population is repopulating volatile zones to access livelihoods.

Figure 5. Distance to the frontline by oblast and key household characteristics



Source: Authors' own elaboration.

Household vulnerability and mobilization

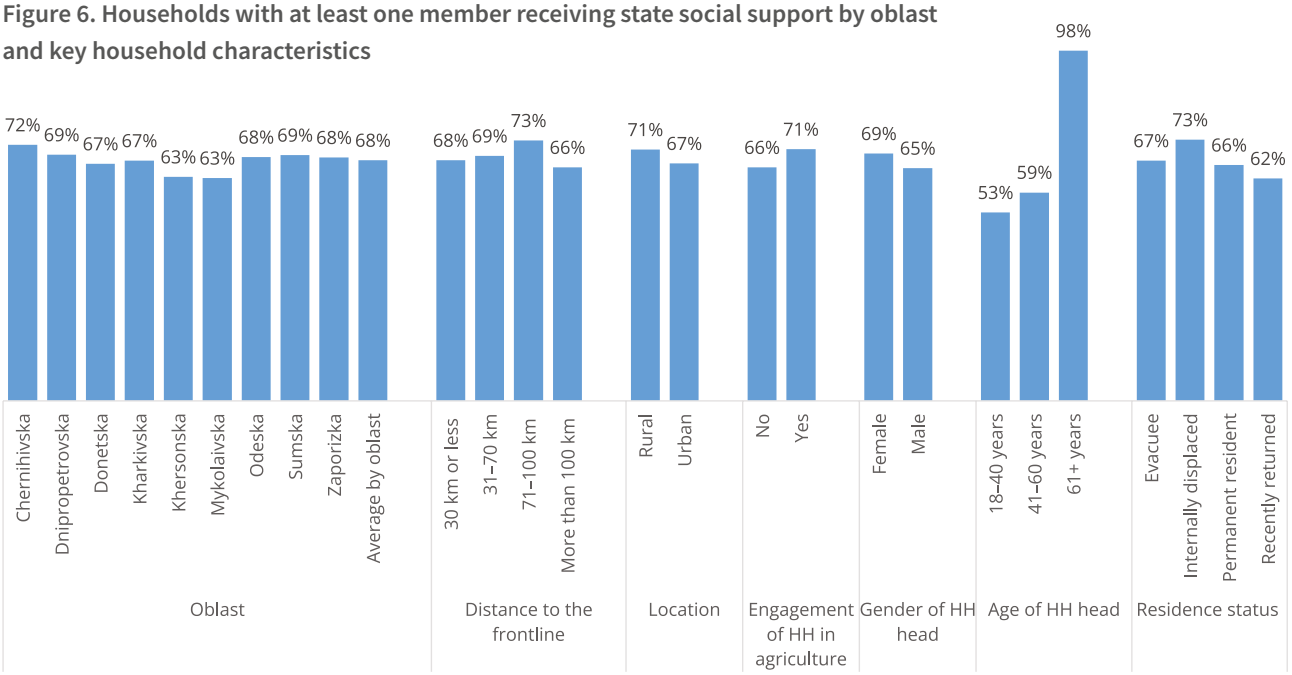
Household vulnerability emerges from a convergence of demographic pressure and shock exposure, where age, health constraints and labour loss reinforce one another. Overall, 42 percent of households include a pensioner and 40 percent include a member with chronic illness, leaving only 30 percent without any recorded vulnerability characteristics. This burden is unevenly distributed: Chernihivska oblast reports the highest share of households with pensioners (51 percent), while Odeska oblast records the highest prevalence of chronic illness (45 percent). Clear demographic divides are also evident – permanent residents and rural households carry the heaviest age-related burden (47 percent include a pensioner), whereas IDPs skew younger and more frequently include children under five (20 percent). These pressures are further intensified by military mobilization, which affects 20 percent of households overall and rises to 25 percent in Sumska, Mykolaivska and Zaporizka oblasts. Critically, rural areas face a growing labour squeeze: mobilization rates are higher in rural settings (24 percent) than in urban centres (19 percent), while rural households also account for the largest share of household heads aged 61 and above. Taken together, the data point to a compounding vulnerability pattern – especially among rural, permanent-resident communities – where high dependency and chronic illnesses coincide with shrinking labour capacity, increasing the risk of livelihood decline and reduced access to essential services.

Access to state support and services

State social assistance is a central pillar of household resilience, shaping who can cope financially – especially among older, rural, and vulnerable

populations. As Figure 6 shows, it anchors the household economy, reaching 68 percent of the population on average, with dependency peaking in Chernihivska oblast (72 percent). Coverage appears well targeted, reaching near-universal levels among heads aged 61 and above (98 percent) and households with multiple vulnerable members (99 percent). Displacement status also drives reliance: IDPs report the highest usage (73 percent), likely due to specific allowances, while returnees report the lowest (62 percent). A clear rural dependency is evident, with 71 percent of rural and agricultural households receiving aid compared with 67 percent of urban households. Consequently, state transfers (primarily pensions) have become the de facto economic lifeline for rural communities, effectively subsidizing subsistence farming amidst an aging workforce.

Figure 6. Households with at least one member receiving state social support by oblast and key household characteristics



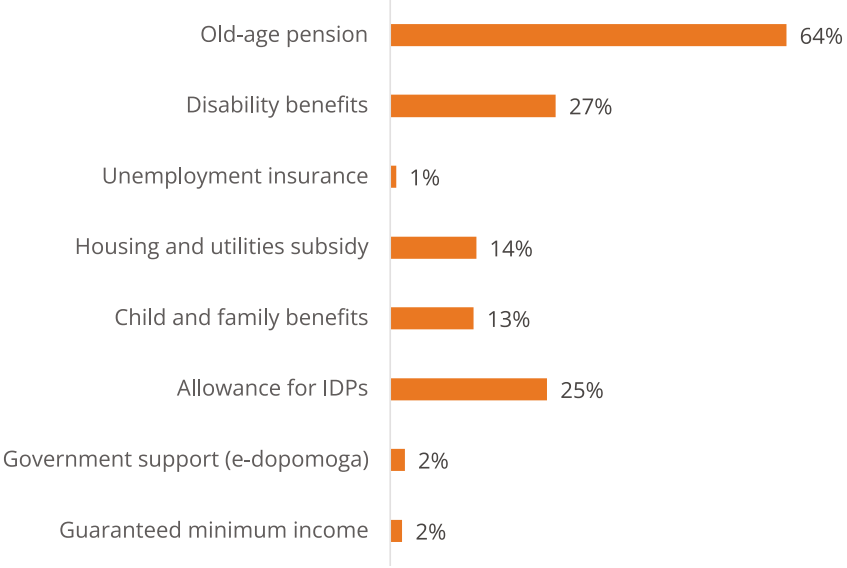
Source: Authors' own elaboration.

As Figure 7 shows, the social safety net functions through two distinct streams: old-age pensions, supporting 64 percent of beneficiaries (primarily rural households headed by individuals aged 61 and above), and IDPs allowances, supporting 25 percent (primarily the younger displaced population in urban areas). While disability benefits (27 percent) and housing subsidies (14 percent) provide additional support, the system effectively bifurcates into a rural geriatric support network and an urban displacement safety net.

In contrast, engagement with agricultural institutions is negligible. Only 6 percent of all households – and critically, just 9 percent of active agricultural households – are registered in the State Agrarian Registry (SAR), leaving over 90 percent of producers disconnected from state aid. The primary barrier is an information vacuum, with 71 percent of unregistered households citing a lack of awareness. However, the system proves effective for the few who engage: 60 percent of applicants

successfully received support and 52 percent rated the experience positively, indicating that while the mechanism is sound, its impact is paralyzed by poor outreach.

Figure 7. Share of households receiving different types of social protection benefits



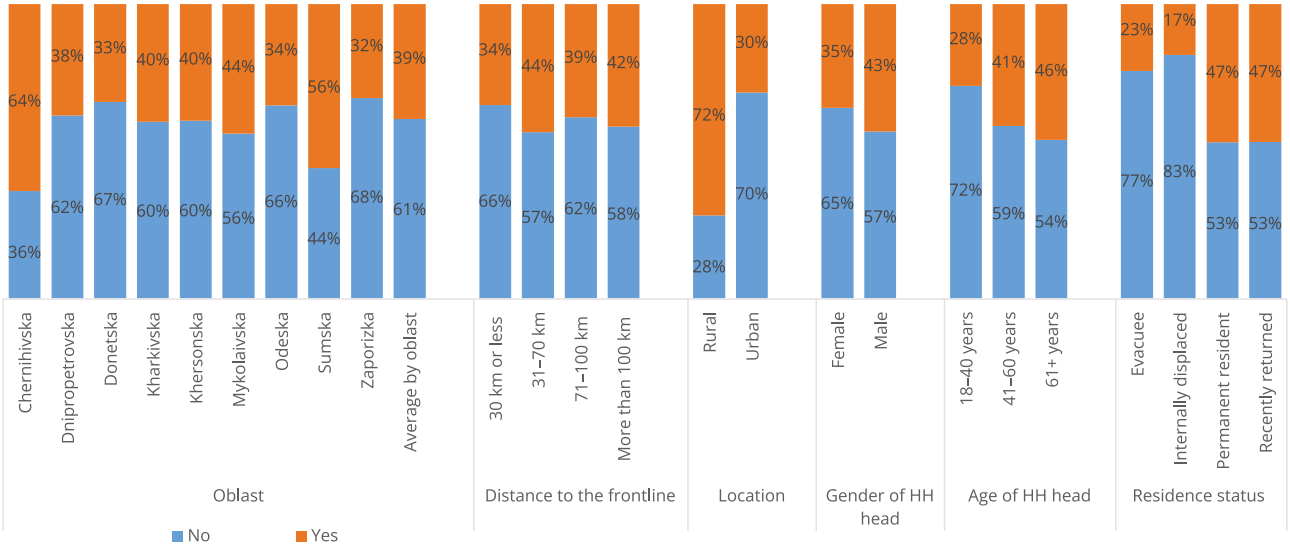
Source: Authors' own elaboration.

Prevalence of agricultural engagement among households

As shown in Figure 8, agricultural engagement involves 39 percent of households, but participation is sharply shaped by geography and household profile. The strongest divide is rural–urban: 72 percent of rural households are engaged in farming activities compared with 30 percent of urban households. Regional variation is also pronounced, with the highest engagement in Chernihivska (64 percent) and Sumska (56 percent) oblasts, and much lower participation in war-affected oblasts such as Zaporizka (32 percent) and Donetska (33 percent). Proximity to the frontline acts as a hard constraint, with engagement falling to 34 percent within 30 km compared with 44 percent in relatively safer areas (31–70 km), indicating that insecurity is directly suppressing production.

Demographic patterns reinforce agriculture's role as a coping strategy. Engagement increases with age (46 percent among households headed by individuals aged 61 and above), is slightly higher in male-headed households (43 percent), and peaks among households with three or more vulnerable members (56 percent), suggesting that agricultural production is often used to stabilize food access when other options are limited. Displacement disrupts this coping pathway: only 17 percent of IDPs report engaging in farming, compared with 47 percent of permanent residents and returnees, reflecting reduced access to land, inputs and social networks.

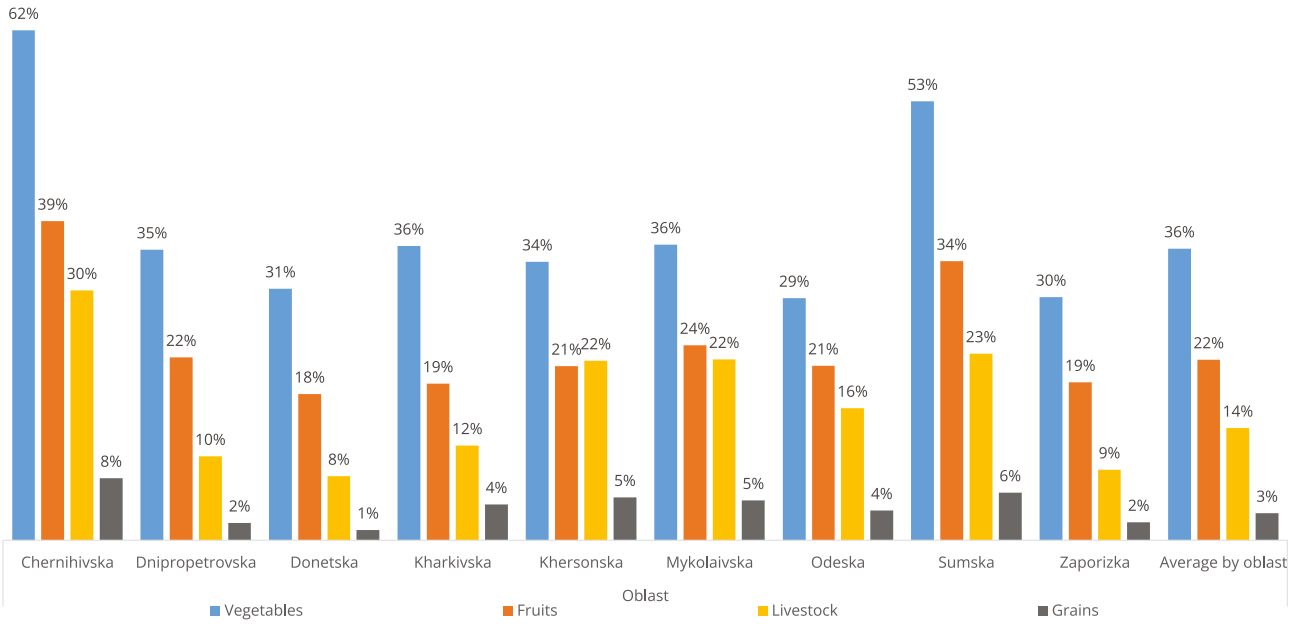
Figure 8. Share of households engaged in agricultural activities by oblast and key household characteristics



Source: Authors' own elaboration.

Where households do farm, production is overwhelmingly subsistence-oriented rather than commercial. As Figure 9 shows, vegetable cultivation is most common (36 percent), followed by fruit production (22 percent), while livestock (14 percent) and grains (3 percent) remain far less prevalent. These differences widen with the war impact: while Chernihivska oblast leads across all categories, livestock keeping has nearly collapsed in high-risk zones such as Donetska (8 percent) and Zaporizka (9 percent) oblasts, consistent with the higher costs and risks of sustaining animals under insecurity. Taken together, the evidence points to agriculture functioning less as a growth engine and more as a survival mechanism – concentrated among older, rural and multi-vulnerable households, while the most war-exposed and displaced groups are least able to maintain production.

Figure 9. Main production of households engaged in agricultural activities, by oblast



Source: Authors' own elaboration.

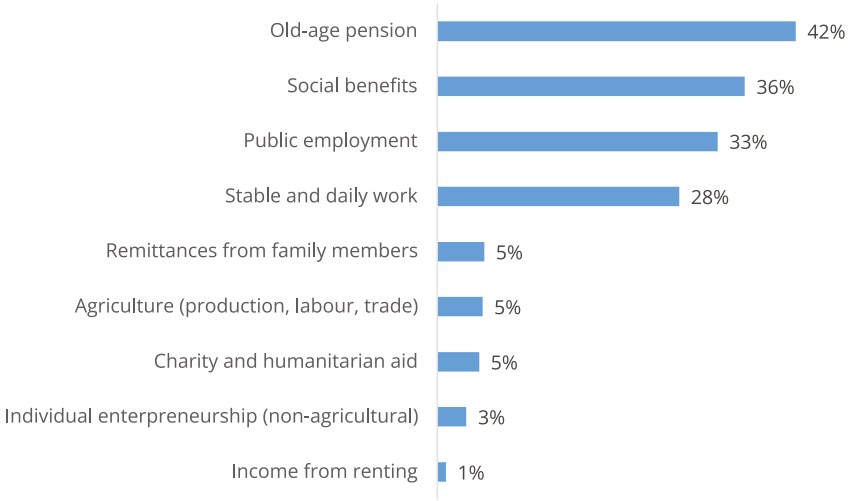
Livelihoods, income stability and economic resilience

Income sources and dependence on state support

The household economy across the surveyed frontline oblasts is anchored less in wages and more in fixed state transfers (Figure 10). Pensions (42 percent) and social benefits (36 percent) are the leading income sources, reflecting the weight of an older "left-behind" population and a strong dependence on the public safety net. Employment plays a secondary role and is increasingly concentrated in the public sector (33 percent), which appears to be the main stabilizing employer, while the private sector has narrowed to 23 percent for stable jobs and just 5 percent for casual work. Strikingly, despite the rural setting, agricultural production generates cash income for only 3 percent of households, reinforcing that farming is primarily subsistence rather than a commercial livelihood.

These income patterns translate into a markedly women-headed household economy. Women are the main income earners in 45 percent of households (compared to 36 percent for men) and hold sole financial authority in 48 percent of households (versus 13 percent for men), aligning with the high prevalence of female headship and pension reliance. Yet vulnerability remains acute at the margins: 2 percent of households report no income at all, surviving only through savings or debt, and 5 percent depend on humanitarian assistance as a regular income source – clear evidence that the social protection floor does not fully cover the most vulnerable households

Figure 10. Distribution of households by main source of income



Source: Authors' own elaboration.

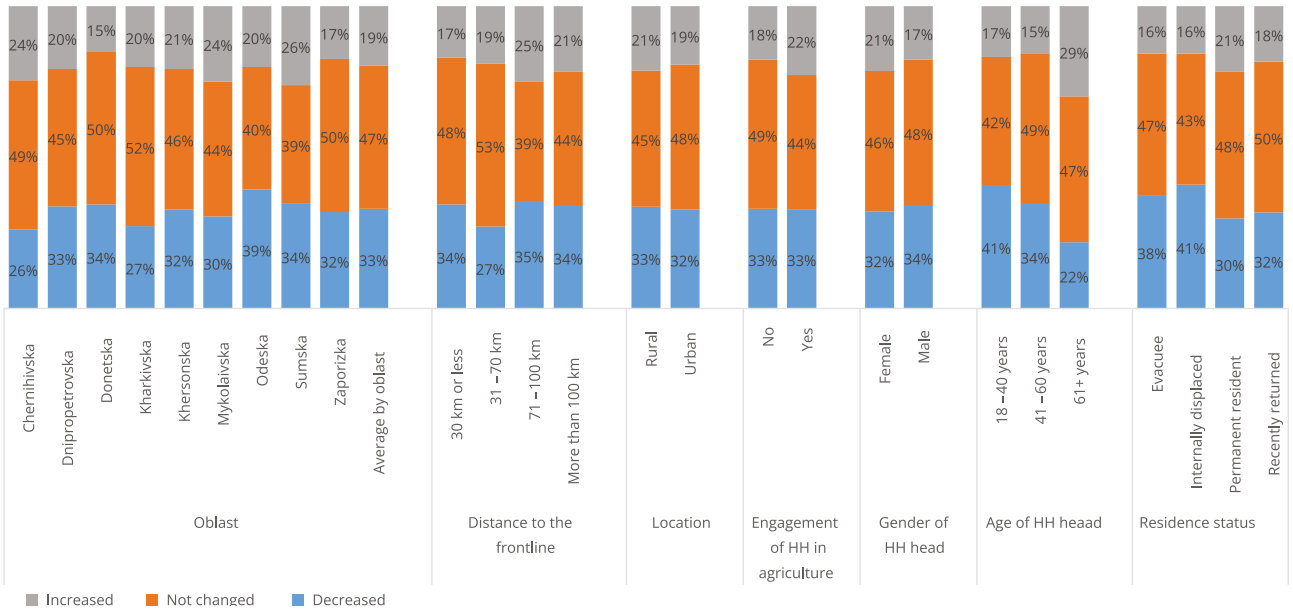
Financial wellbeing and income trends

Household financial conditions have worsened over the past year. As Figure 11 shows, one in three households (33 percent) report that their income has declined, most commonly because of job losses (10 percent) and inflation eroding purchasing power (9 percent). Nearly half (47 percent) report no change – likely reflecting the stabilizing effect

of fixed pensions and benefits – but this "stability" sits on a very low base: 45 percent of households live on under UAH 10 000 (~USD 240) per month, and only 4 percent report incomes above UAH 50 000 (~USD 1 200), pointing to a highly compressed income distribution.

The burden of decline is not evenly shared. A sharp generational split emerges: younger-headed households (18–40) are the most exposed, with 41 percent reporting income losses, while older households (61 and above) are comparatively protected and even show signs of improvement, with 29 percent reporting increased income – consistent with indexed or fixed transfer streams. Displacement further deepens vulnerability: IDPs and evacuees report markedly higher rates of income loss (38–41 percent) than permanent residents (30 percent). By contrast, location is not a strong differentiator; similar patterns appear across rural and urban areas and across different proximity bands to the frontline. Perceptions of wellbeing reinforce a picture of widespread "survival mode." More than half of households cannot meet basic non-food needs – 5 percent cannot afford food, 31 percent cannot afford clothing – and only 2 percent report full financial security, underscoring how limited financial buffers have become.

Figure 11. Change in household income over the past year by location and key household characteristics



Source: Authors' own elaboration.

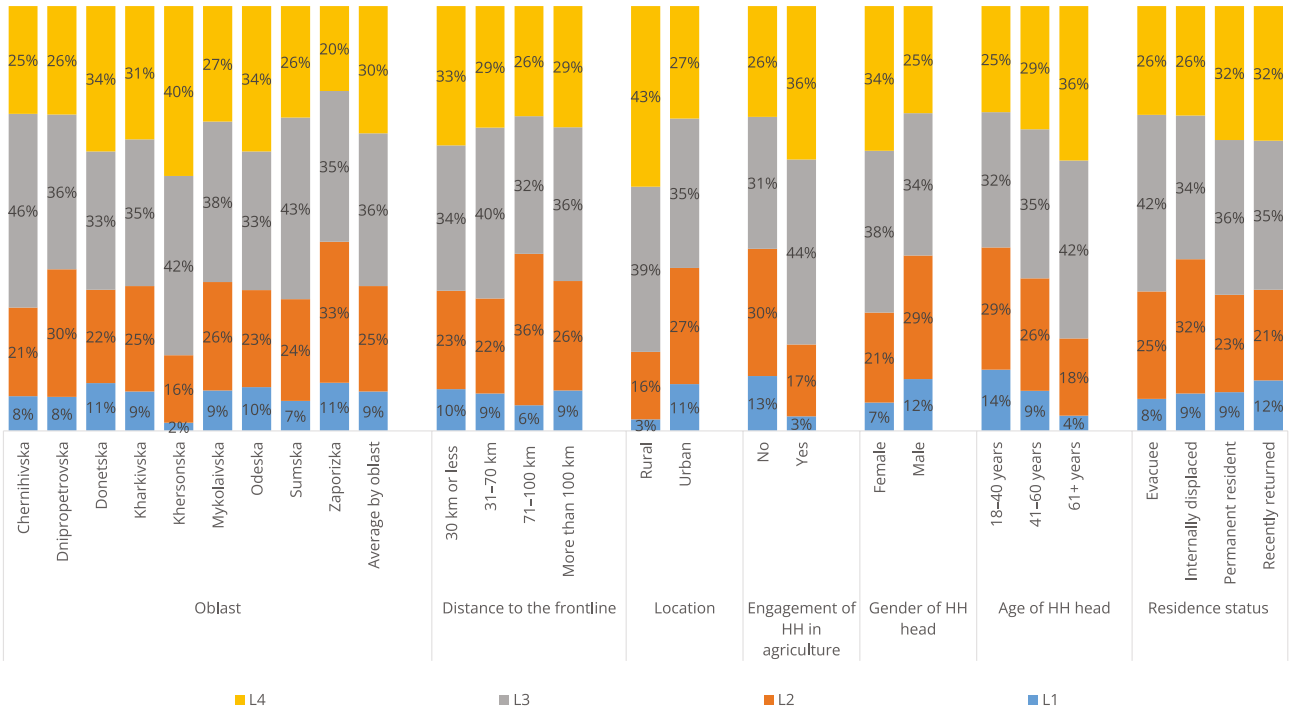
Composite livelihoods severity analysis

To assess the depth of impact on households, a composite livelihoods severity ranking was constructed. Households were classified from L1 (lowest severity) to L4 (highest severity) based on the worst level of distress observed across three linked dimensions: shock exposure, agricultural productivity decline and income stability.[a]

[a] Methodology can be found in the Annex.

The results point to a crisis that is both widespread and unevenly distributed. As shown in Figure 12, two-thirds of households (66 percent) fall into the high (L3) or highest (L4) severity categories, indicating that severe stress is the norm rather than the exception across the surveyed oblasts. Regional contrasts are stark: Khersonska oblast emerges as the epicentre of instability, with 82 percent of households in L3–L4 and only 2 percent in low severity, while oblasts such as Dnipropetrovska show comparatively lower distress. A strong rural penalty is also evident – 43 percent of rural households are classified as extreme severity (L4), compared with 27 percent in urban areas – consistent with the higher exposure and dependency risks among agricultural households. Demographic patterns deepen this picture: households headed by people over the age of 60 and women-headed households are disproportionately represented in the highest severity levels, reflecting compounded vulnerability. Finally, severity is highest among those who stayed or returned-permanent residents, and recent returnees register greater extreme severity than IDPs – suggesting that the populations remaining in, or moving back into, frontline communities are currently absorbing the greatest socioeconomic shocks.

Figure 12. Integrated severity ranking by oblast and key household characteristics



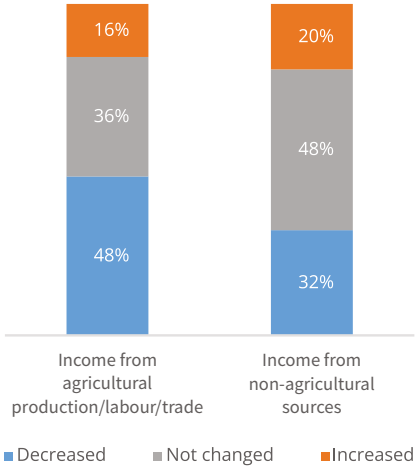
Source: Authors' own elaboration.

Agricultural livelihoods and production profile

As Figure 13 shows, households that rely primarily on agriculture are far more likely to report worsening finances: 48 percent experienced income declines, compared with 32 percent among households, the main income of which comes from other sectors. This gap highlights how exposed market-based farming is to price volatility, disrupted supply chains and broader economic instability. At the same time, the data

also point to agriculture's dual role: while commercial farming income is fragile, subsistence production remains a crucial non-monetary buffer by protecting direct access to food. The most resilient households appear to be those that pair subsistence production with steady, non-market cash transfers (such as pensions or benefits), reducing exposure to both market shocks and income swings. In this context, subsistence agriculture functions less as a growth pathway and more as a survival mechanism in war-affected areas.

Figure 13. Share of households reporting a change in income compared to the previous year



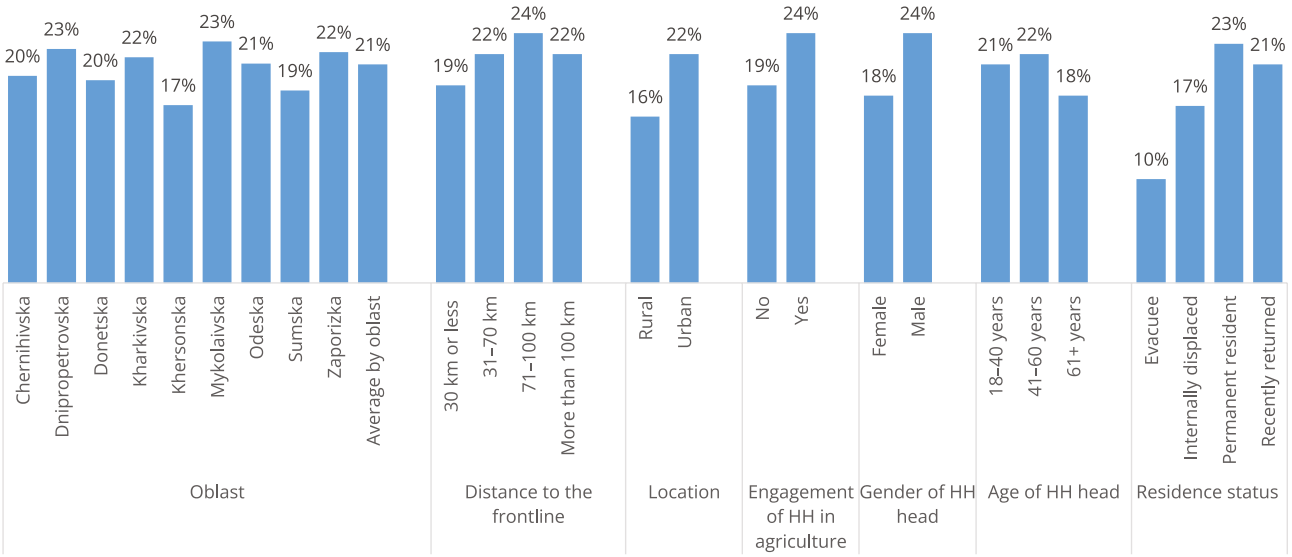
Source: Authors' own elaboration.

Within agricultural incomes, sources are highly concentrated and suggest a shift toward small-scale, labour-intensive activities. Vegetables and livestock products dominate as revenue drivers, each supporting around half of agricultural households, while fruit (20 percent) and grain (11 percent) remain niche. Geography and security conditions sharpen this specialization. Urban agricultural households rely overwhelmingly on vegetables (78 percent) for fast, low-barrier sales, while rural households anchor the livestock economy (67 percent), reflecting land access and traditional production patterns. Proximity to the frontline further reshapes choices: within 30 km, households depend heavily on short-cycle vegetable production (82 percent), whereas livestock – more capital-intensive and harder to protect – becomes the dominant income source (59 percent) only in safer areas beyond 100 km. Vulnerability status reinforces this logic: evacuees are almost entirely dependent on vegetables (97 percent), consistent with reduced land access and the need for quick returns, while grain cultivation is concentrated among younger, male-headed households – those most able to manage field-scale operations.

Debt, savings and coping capacities

Overall, savings are limited: the average across oblasts is 21 percent. By oblast, reported savings range from 17 percent in Kharkivska oblast to 23 percent in Chernihivska and Khersonska oblasts (with most others clustering around 19–22 percent). Savings are more common in urban than rural areas (22 percent versus 16 percent) and are higher among households with agricultural activities (24 percent) than among those without (19 percent). Differences by gender of household head are small but notable: male-headed households report higher savings than women-headed households (24 percent vs 18 percent). By age, working-age heads report more savings (21–22 percent for 18–60) than households headed by people over the age of 60 (18 percent). Displacement status shows the starkest gap: evacuees report the lowest savings (10 percent), compared with IDPs (17 percent), permanent residents (23 percent), and recently returned households (21 percent) (Figure 14).

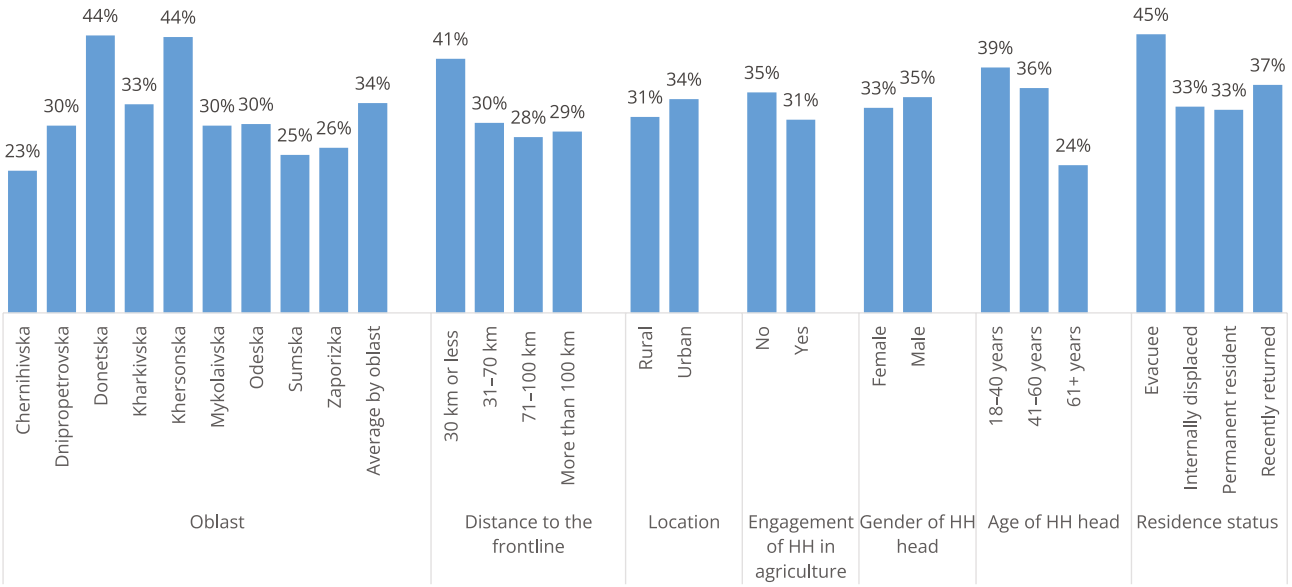
Figure 14. Share of households reporting having savings by oblast and key household characteristics



Source: Authors' own elaboration.

Concurrently, the lack of savings is a significant burden of debt. Approximately 34 percent of households currently hold debt (Figure 15). For many, this indebtedness is a direct result of the war; 14 percent of respondents indicated that their debt only appeared after the war escalation in 2022. Furthermore, 14 percent reported that their debt levels have increased, ranging from slightly to drastically higher, since 2022. This trend suggests that borrowing is being used as a coping mechanism to bridge the gap between declining incomes and rising costs.

Figure 15. Share of households with outstanding debts in 2025 by oblast and key household characteristics

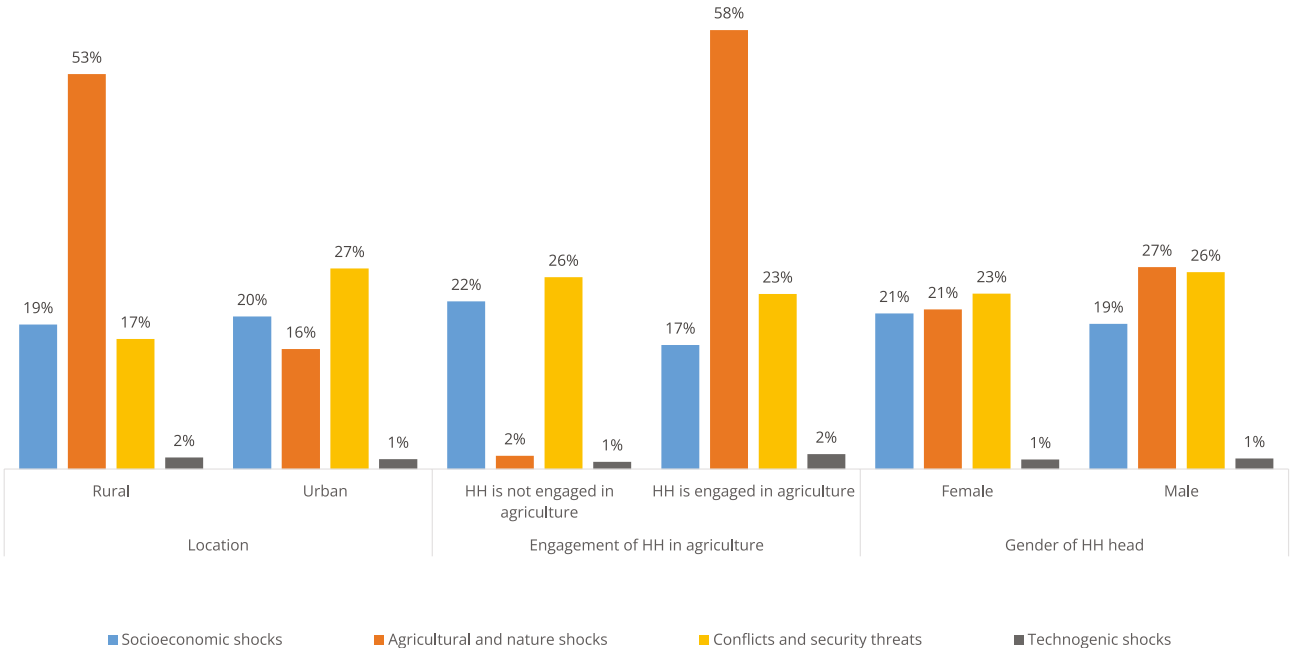


Source: Authors' own elaboration.

Borrowing patterns show a struggle for day-to-day survival rather than investment or recovery. Households mainly take on debt to meet immediate distress costs – utilities (12 percent), medical expenses (7 percent) and food (4 percent) – while borrowing for productive purposes, such as agricultural assets, is virtually absent (<0.5 percent). This lack of "growth" credit aligns with the broader shock environment: even though 46 percent of households reported no recent shocks, a majority are operating under stress, with 38 percent experiencing at least one shock and 15 percent facing two or more simultaneously.

Against this backdrop, Figure 16 maps the types of shocks households report – socioeconomic, agricultural and natural, conflict and security, and technogenic – by location, livelihood and gender. A clear structural divide emerges: rural and farming households are disproportionately hit by agricultural and natural shocks (53–59 percent), while urban and non-agricultural households more often report war-related and socioeconomic stressors. Gender differences are limited, although male-headed households show slightly higher exposure to agricultural and natural shocks. Technogenic shocks remain negligible across all groups (1–2 percent). The most severe agricultural and natural challenges include plant diseases, pest outbreaks, droughts and cold spells, while socioeconomic pressures are driven mainly by high food prices, health shocks and job loss.

Figure 16. Types of shocks reported by households, by oblast and key household characteristics



Source: Authors' own elaboration.

Analysis of household agricultural activity and resilience

Crop production characteristics and difficulties

Household agriculture is primarily a food security strategy rather than a source of cash income. Production is dominated by vegetables, reported by 36 percent of households on average, with standout concentrations in Chernihivska (62 percent) and Sumska (53 percent) oblasts. Fruit production is less widespread (22 percent overall) but follows the same regional pattern, peaking in Chernihivska (39 percent) and Sumska (34 percent) oblasts.

Geography is the clearest driver. Rural households are far more likely to produce crops than urban households – vegetables (65 percent vs 27 percent), fruits (36 percent vs 18 percent), and grains (10 percent vs 1 percent) – showing that farming remains a core rural livelihood while functioning mainly as a supplementary activity in towns and cities. CImpact of the war adds another layer: production rises modestly with distance from the frontline, with vegetables increasing from 32 percent within 30 km to 37 percent beyond 100 km and fruits from 19 percent to 25 percent, suggesting that insecurity is suppressing cultivation in the most exposed areas.

Household characteristics also shape engagement, though less dramatically. Male-headed households report slightly higher participation than women-headed households (vegetables – 38 percent vs 33 percent; fruits – 25 percent vs 20 percent), and older-headed households are more involved than younger ones (vegetables – 42 percent among 61+ vs 25 percent among 18–40; fruits – 26 percent vs 15 percent). Displacement status is one of the sharpest dividing lines: permanent residents and recently returned households report much higher production than evacuees and IDPs – especially for vegetables (43 percent vs 16–22 percent) and fruits (26–28 percent vs 6 percent) – highlighting how displacement disrupts access to land, inputs and the ability to farm at all.

These production patterns persist under a major physical constraint: 13 percent of agricultural households report that mines or UXO have made part of their land unfit for cultivation – effectively sidelining more than one-tenth of productive land. The burden is sharply concentrated in the most war-affected areas, led by Khersonska (36.1 percent) oblast, with both Donetska and Kharkivska oblasts at 20.6 percent, indicating that contamination is a frontline-driven barrier to recovery rather than a uniform national problem. The displacement profile is even more striking: contamination is reported by 42.6 percent of evacuees, remains high among IDPs (25.3 percent), and still affects 21.6 percent of recent returnees, suggesting many are attempting to resume cultivation despite persistent hazards; permanent residents report only 8.7 percent, likely because populations in the most contaminated locations have already been evacuated or displaced.

Mobilization is steadily hollowing out the rural labour pool. While 29 percent of households report no effect, around 12 percent say they have lost essential workforce capacity – most often seasonal labour (8 percent), followed by field operators (3 percent) and skilled machinery technicians (1 percent). With labour and security constraints tightening at the same time, agriculture is increasingly serving as a coping strategy rather than a market livelihood. The clearest signal is commercialization: 86 percent of agricultural households sell none of their production and consume it entirely to meet household food needs. Only 14 percent generate any revenue, and even then, sales are narrow and concentrated – mostly vegetables and livestock products (8 percent each) – leaving households with thin cash buffers and high exposure to any new production shock.

Crop economics: sales, income and costs

Commercial sales remain the exception rather than the norm, and even households that do sell tend to market only a small share of their harvest. Most still prioritize self-consumption: 74 percent sell less than half of their harvest, and only 19 percent sell more than 75 percent. Predictably, earnings are weakening – 52 percent of selling households report declining revenue over the past year, including 21 percent who experienced a drop of more than half, while just 10 percent report any increase – pointing to squeezed local demand and disrupted supply chains.

This revenue erosion is happening just as production costs are rising. Over 57 percent of households report higher costs in 2025, compared with fewer than 4 percent who saw any decrease, and 31 percent describe the increase as drastic. The result is a classic squeeze: fuel, seeds and fertilizer are becoming more expensive at the same time that sales are shrinking, undermining the viability of smallholder farming and forcing households to “finance” food production through their own labour and depleted savings.

Taken together, low sales, falling revenue and escalating input costs – compounded by limited access to markets, fuel, and electricity – place the sector firmly in survival mode. Households continue cultivating to secure immediate food needs, but weak profitability blocks reinvestment in next season’s inputs. Without recapitalization, these dynamic risks a downward spiral in productivity, locking households into low-yield subsistence farming over the longer term.

Livestock demographics and production dynamics

Livestock production is reported by 14 percent of households on average across oblasts, but the pattern is highly uneven – highest in Chernihivska (30 percent) oblast, followed by Sumska (23 percent), and Khersonska/ Mykolaivska (22 percent each), and lowest in Donetska (8 percent) and

Zaporizka (9 percent) oblasts. Frontline proximity clearly suppresses livestock keeping: only 9 percent of households within 30 km to the frontline report livestock production, compared with 17 percent at 31–70 km, 11 percent at 71–100 km and 17 percent beyond 100 km. The rural–urban divide is stark, with 41 percent of rural households keeping livestock versus just 6 percent in urban areas. Differences by household heads are smaller but consistent – male-headed households report slightly higher livestock production than women-headed households (14 percent vs 13 percent), and engagement rises with age (10 percent among 18–40, 14 percent among 41–60, and 16 percent among 61 and above). Displacement status shows the sharpest break: permanent residents (17 percent) and recently returned households (16 percent) are far more likely to keep livestock than evacuees (12 percent), and especially IDPs (4 percent).

Within livestock production, households overwhelmingly rely on small-scale poultry production, practiced by 91 percent of livestock-keeping households. Pig farming (15 percent) and cattle rearing (10 percent) are much less common, and year-on-year comparisons indicate a deliberate shift away from higher-cost animals: pig and cattle keeping fell from 20 percent and 12 percent last year, respectively. Taken together, this points to risk management under pressure – households are "downsizing" from capital- and feed-intensive livestock toward poultry, which is cheaper to maintain, reproduces quickly and provides faster returns.

Direct war impacts have caused significant capital destruction. Among surveyed households, 21 percent of livestock keepers report losing animals because of the war (via forced slaughter, distress sales or shelling) – a rate notably higher than that of land contamination. These losses are often total; for cattle, 97 percent of affected households lost their entire herds (1–8 head), while poultry losses frequently involved flocks of over 100 birds. These figures represent not just a financial hit, but the erasure of critical productive assets that will take years to rebuild.

Consequently, the sector faces a clear downward trend in output. While 55 percent of households managed to maintain stable production, 35 percent reported a decrease, with 1 percent ceasing operations entirely. Only roughly 8 percent reported any increase. This contraction directly correlates with the reduced herd sizes and forced asset losses, signalling a tightening supply of locally produced meat and dairy for household consumption.

Livestock economics and operational challenges

Similar to the crop sector, livestock production is primarily for self-consumption, though it retains a slightly stronger commercial foothold. While 39 percent of sellers' market only a small fraction of their output, a core group of 17 percent commercializes over 75 percent of their production, relying on dairy and meat as vital cash sources.

However, revenue is deteriorating: 45 percent of selling households reported a decline in income (with 8 percent citing a drastic drop), compromising their ability to purchase essential inputs like veterinary medicines.

The sector faces an acute "cost of production" crisis. Over 62 percent of livestock keepers reported rising operational costs in 2025, with nearly 40 percent describing these increases as significant or drastic. Unlike seasonal crop farming, livestock requires daily expenditures, making these sustained hikes devastating. The primary driver is clear: 29 percent of households cited difficulty accessing feed as their top challenge, the single most reported issue.

This convergence of low profitability (cited by 13 percent of households) and the prohibitive cost of feed is forcing distress decisions. When feed becomes unaffordable or unavailable, farmers are compelled to prematurely slaughter animals they can no longer sustain, leading to a cycle of destocking that further erodes the household's long-term economic resilience.

Infrastructure damage and asset loss

The sector has suffered significant degradation of physical capital, with stationary infrastructure proving far more vulnerable than mobile equipment. In the crop sector, 10 percent of households reported damage to buildings (barns, greenhouses) compared to 4 percent for machinery. The livestock sector has been hit even harder: nearly 20 percent of livestock keepers reported the destruction of animal housing (pens, sheds), while only 4 percent reported equipment damage. This high rate of shelter destruction is critical; unlike seasonal crops, livestock require year-round protection, meaning the loss of a barn often forces immediate herd liquidation.

While the absolute volume of lost items appears, approximately 88 percent of affected households lost between 1 and 3 structures – this often represents a total loss of operational capacity for smallholders. A family that loses its only storage shed or animal pen effectively loses 100 percent of its ability to farm.

This physical destruction has created a "reconstruction trap." With financial reserves depleted by high input costs and falling incomes, households lack the liquidity to repair destroyed assets. Consequently, they are stuck in paralysis where they cannot rebuild because they have no income yet cannot generate income because their productive base is shattered.

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Food security, nutrition and livelihood coping strategies

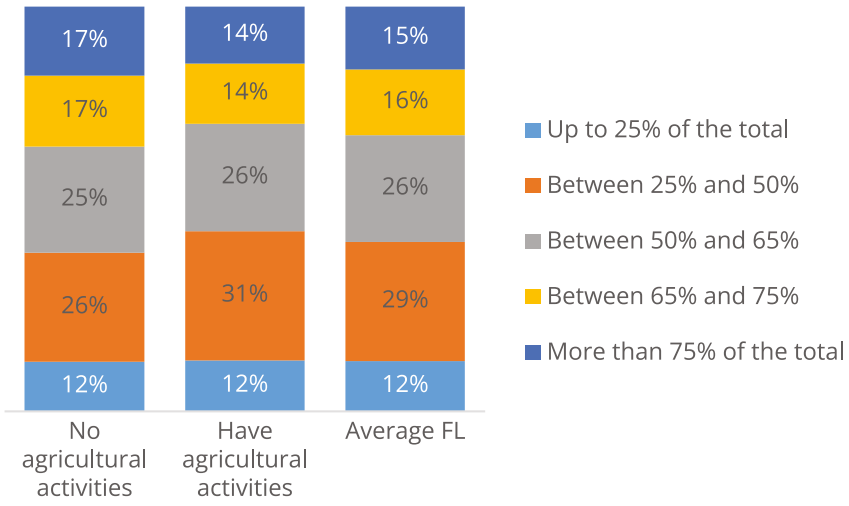
Economic vulnerability and food expenditure patterns

As Figure 17 shows a precarious economic reality, where 31 percent of households spend over 65 percent of their budget on food, sacrificing critical needs like medication for subsistence. Financial resilience is the exception, as only 12 percent allocate less than 25 percent to food. A stark urban-rural divide exists: 59 percent of urban households spend more than half of their income on food compared to 50 percent of rural households. This vulnerability is driven by urban reliance on markets and exposure to inflation, lacking the buffer of self-production found in villages. Expenditure stress peaks in frontline zones like Donetska and Khersonska oblasts, confirming that food insecurity is primarily a crisis of economic access, specifically affordability, rather than physical availability.

Sources of household food consumption

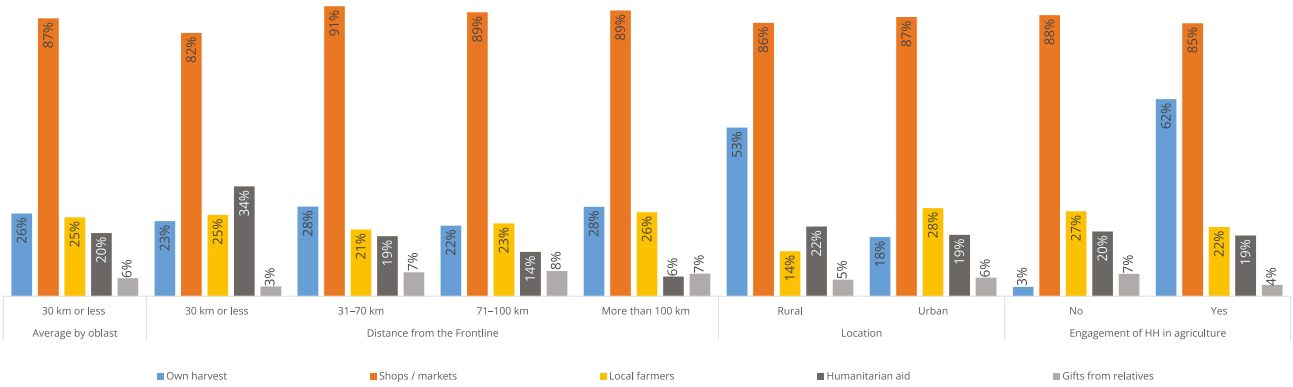
As Figure 18 shows, commercial markets remain the primary food source for 87 percent of households, yet reliance on humanitarian aid spikes in active frontline zones, reaching 47 percent in Khersonska and 43 percent in Donetska oblasts. A sharp divide in self-sufficiency persists: 53 percent of rural households consume their own harvest compared to just 18 percent of urban residents, while agricultural engagement allows farming households to source 62 percent of their food independently. Displacement status severely limits this autonomy, with evacuees (30 percent) and IDPs (26 percent) depending heavily on aid, whereas permanent residents are the most self-sufficient (32 percent consume their own harvest). The widespread dependence on cash-based market access exposes households to inflation, meaning that for the majority, food security is less about physical availability than economic affordability.

Figure 17. Share of total household expenditure spent on food by agricultural activity status



Source: Authors' own elaboration.

Figure 18. Main sources of food for households

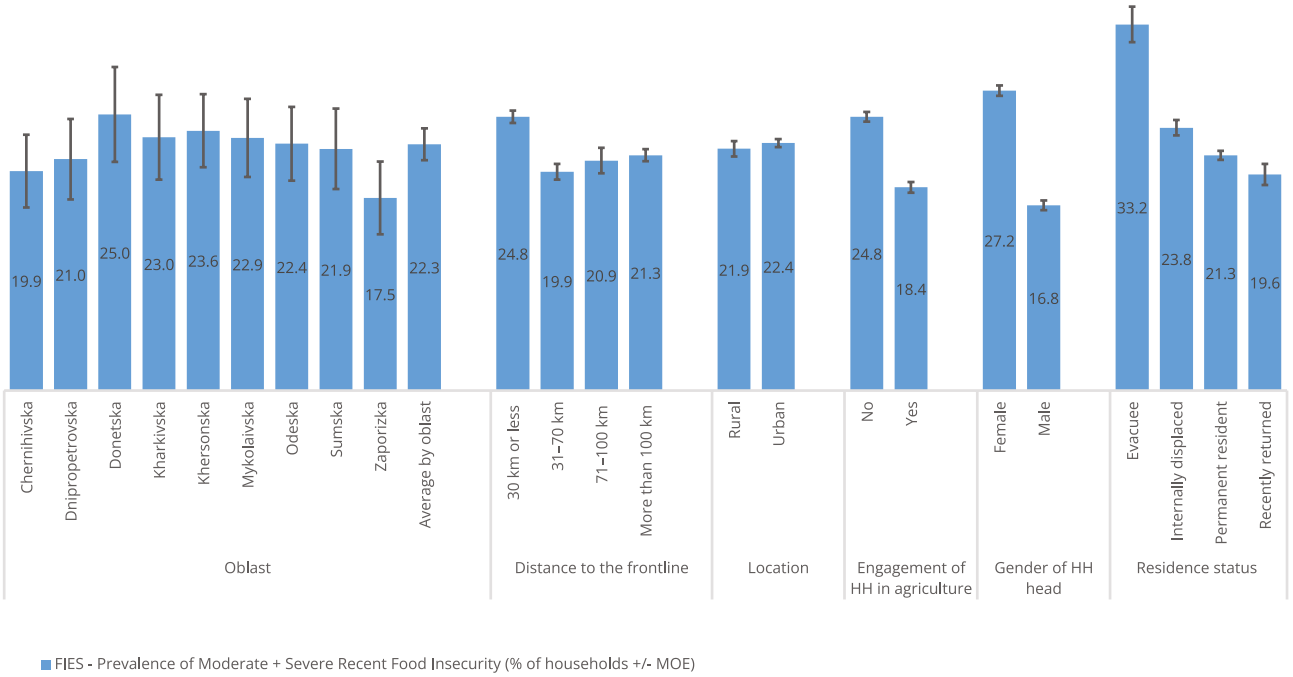


Source: Authors' own elaboration.

Prevalence of food insecurity (FIES)

As Figure 19 shows, moderate to severe food insecurity affects 22 percent of households on average, peaking in active conflict zones like Donetska (25 percent) and Khersonska (24 percent) oblasts. Proximity to the frontline exacerbates risk, with prevalence reaching 25 percent within the 30 km zone. While settlement type shows no significant divide - urban and rural rates are nearly identical - agricultural engagement proves highly protective: non-farming households face substantially higher insecurity (25 percent) than those with agricultural activities (18 percent). Vulnerability is most acute among specific demographics; evacuees report the highest distress levels (33 percent), and female-headed households face a severe gender gap (27 percent) compared to male-headed households (17 percent).

Figure 19. Prevalence of moderate + severe recent food insecurity by oblast and key households characteristics



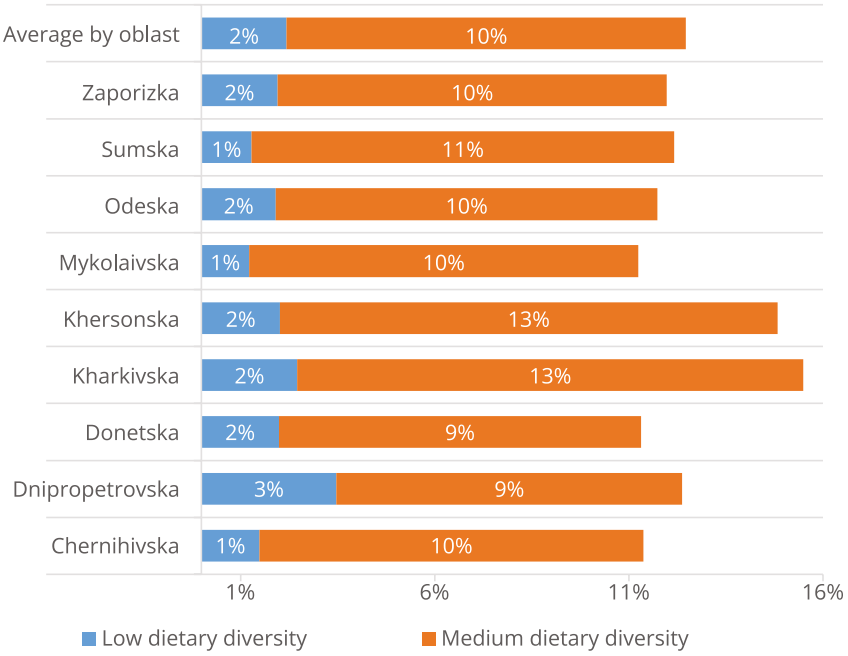
FIES - Prevalence of Moderate + Severe Recent Food Insecurity (% of households +/- MOE)

Source: Authors' own elaboration.

Dietary diversity and nutritional quality

While 88 percent of households maintain high dietary diversity, a fragile 12 percent remain at risk, with 10 percent in the "medium" category representing a critical "tipping point" vulnerable to any further income shocks (Figure 20). This deficit is fundamentally economic rather than physical; low liquidity forces vulnerable families to substitute nutrient-dense proteins with cheaper staples, creating a risk of "hidden hunger". A rural-urban paradox persists where rural households, despite their gardens, show marginally lower diversity scores than urban residents. This is driven by seasonality and lower incomes, which limit rural access to diverse, non-local proteins and commercial products readily available in urban supermarkets.

Figure 20. Share of households with low or medium dietary diversity by oblast



Source: Authors' own elaboration.

Livelihood coping strategies

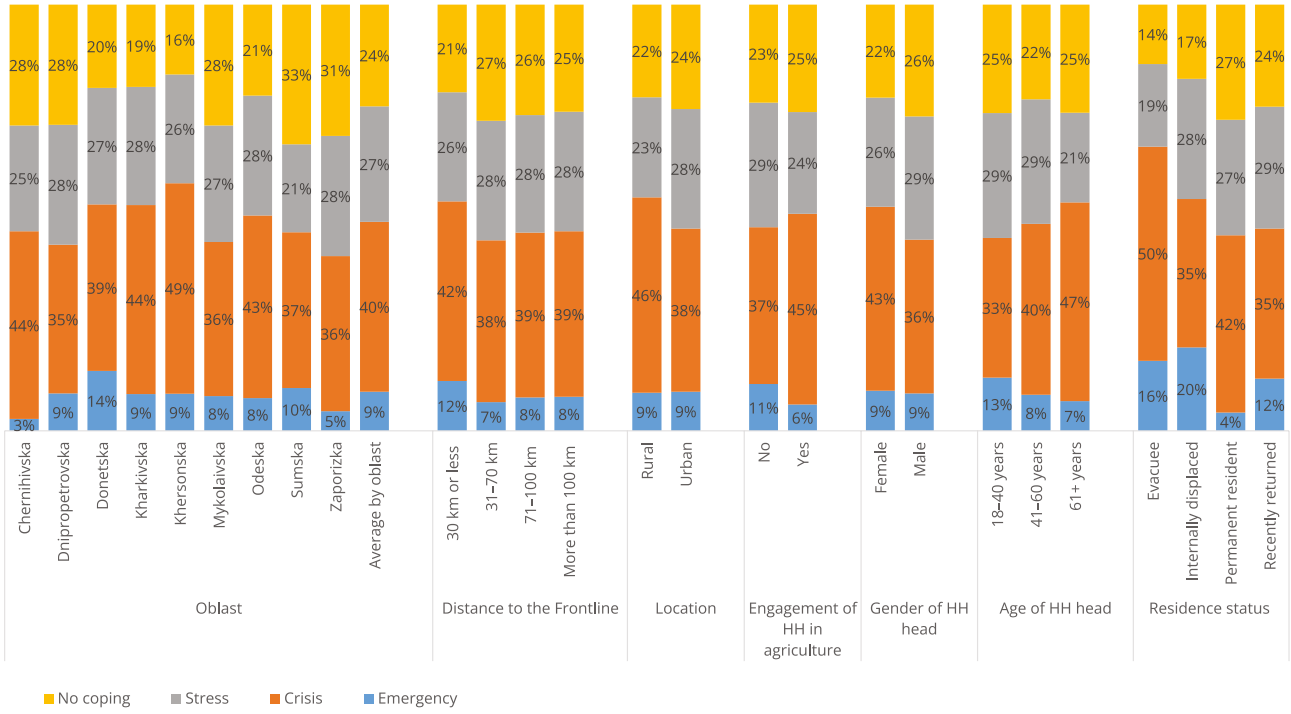
As seen from Figure 21, negative coping strategies are pervasive, with 76 percent of households employing them to meet essential needs. The most common are crisis strategies (40 percent), such as reducing health expenses, followed by stress strategies (27 percent) like spending savings, while 9 percent resort to severe emergency strategies involving the sale of housing or land.

Severity is dictated by location and demographics. Donetska oblast reports the highest use of emergency strategies (14 percent), while Khersonska oblast leads in crisis strategies (49 percent). Acute pressure is visible within 30 km from the frontline, where emergency strategy usage hits 12 percent. A rural-urban divide exists: rural households rely more on crisis

strategies (46 percent) than urban ones (38 percent). Though agricultural engagement acts as a buffer, halving emergency strategy usage to 6 percent compared to 11 percent for non-farming households.

Vulnerability is deeply stratified. Women-headed households (43 percent) and older people (47 percent) heavily utilize crisis strategies, eroding resilience over time. Conversely, younger heads (18–40) and displaced populations (IDPs/evacuees) show the highest reliance on high-risk emergency strategies (13–20 percent). Notably, the highest emergency strategy usage (12 percent) occurs among households receiving multiple forms of aid, confirming that humanitarian assistance is reaching the most desperate populations who have exhausted all other coping mechanisms.

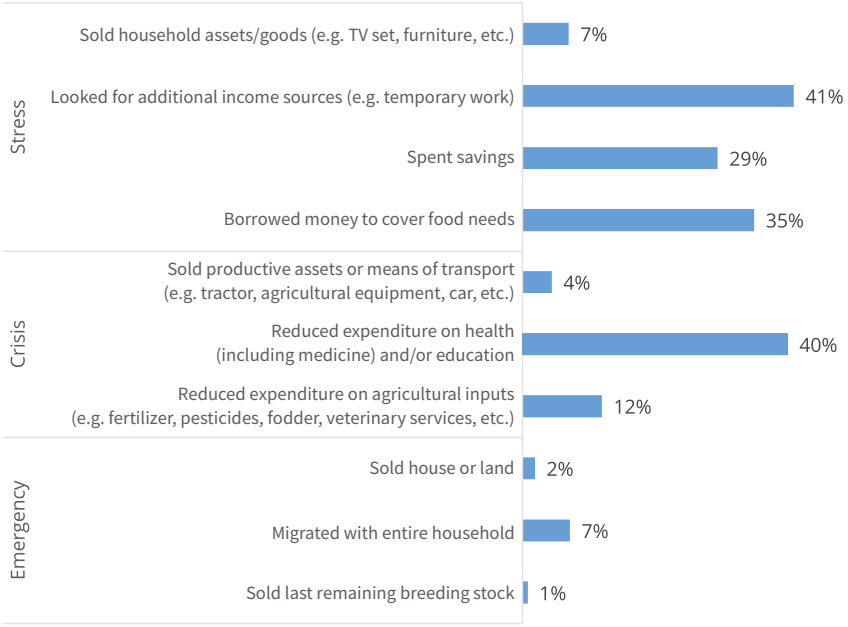
Figure 21. Livelihood coping strategy levels by oblast and key household characteristics



Source: Authors' own elaboration.

Figure 22 summarizes the main food-related coping strategies used by households, grouped into stress, crisis and emergency strategies, presents the proportion of households that adopted each strategy. Households primarily manage financial stress by seeking additional income (41 percent) or borrowing money for food (35 percent), while nearly one-third (29 percent) are depleting their savings. More severe crisis strategies are defined by critical reductions in health and education spending (40 percent), with a smaller cohort compromising future livelihoods by cutting agricultural inputs (12 percent) or selling productive assets (4 percent). Emergency measures, though less frequent, reveal deep destitution: 7 percent of households have migrated because of food insecurity, while others have resorted to selling their homes (2 percent) or last remaining breeding livestock (1 percent).

Figure 22. LCS level prevalence by severity



Source: Authors' own elaboration.

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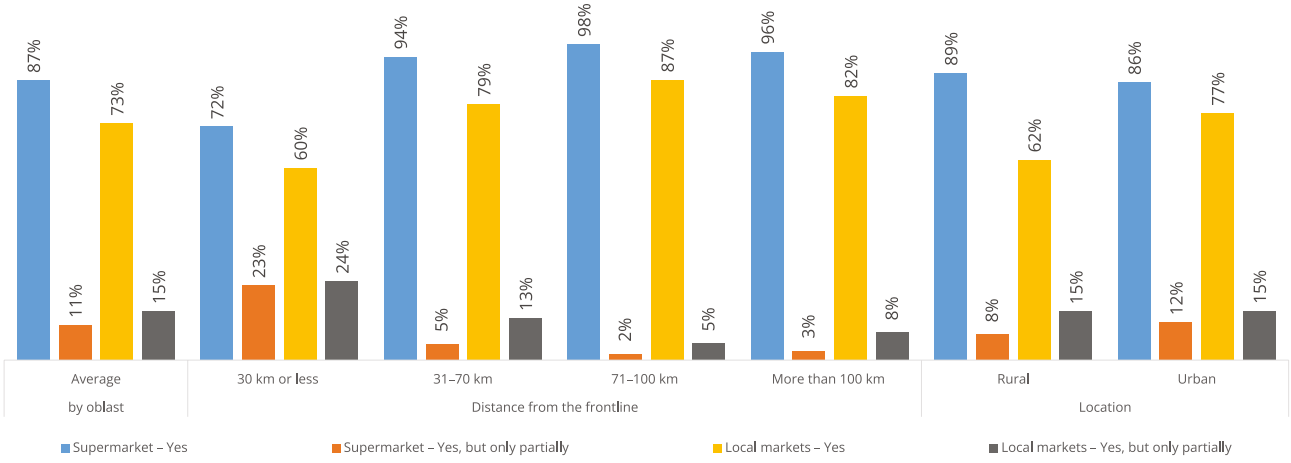
Market infrastructure, input supply chains and essential services

Market access and food availability

As Figure 23 shows, retail market infrastructure remains resilient, with 87 percent of supermarkets fully operational compared to 74 percent of local markets, which prove more vulnerable to security threats. However, access is geographically stratified: functionality drops to 60–73 percent within 30 km from the frontline and remains precarious in highly affected regions like Donetska and Khersonska oblasts. A structural rural-urban divide persists, as rural residents rely on local markets prone to disruption, forcing them to incur higher transport costs to access stable urban supply chains. Ultimately, while physical availability is high, the primary barrier is affordability; for the most vulnerable households, fully stocked supermarkets remain inaccessible because of a lack of purchasing power.

Figure 23. Household access to supermarkets and local markets by distance from the frontline



Source: Authors' own elaboration.

Agricultural input access and market linkages

Input supply and market linkages form a single, fragile system: when inputs are hard to obtain and sales channels are narrow, farming quickly shifts from commerce to survival. Overall, only about 30 percent of households report full access to key agricultural inputs. Access is strongest in Chernihivska (52 percent) and Sumska (43 percent) oblasts, but drops sharply in frontline oblasts such as Donetska and Khersonska (20 percent each). This pattern tracks security conditions – full access is reported by 21 percent of households within 30 km from the frontline, rising to 33 percent beyond 100 km. Access also varies by population group: rural households report higher access than urban households (48 percent vs 23 percent), while the most constrained groups are IDPs (13 percent) compared with permanent residents (34 percent); access is also lower among women-headed households (26 percent) and younger respondents (19 percent).

Despite these constraints, inputs are still sourced primarily through markets. Roughly two-thirds (67 percent) of agricultural households rely on suppliers still operating in their region, while one-fifth (20 percent) source from other regions, and about one-fifth (22 percent) use seeds from their own production. However, humanitarian aid is already a notable pillar (about 10 percent on average), signalling that input supply is increasingly tied to assistance in the most disrupted environments.

The clearest trend is the security gradient. Reliance on humanitarian aid rises from 3 percent in areas less than 100 km from the frontline to 15 percent within 30 km, while reliance on in-region suppliers falls from 74 percent to 59 percent over the same distance bands. Oblast outliers reflect this stress: humanitarian sourcing is highest in Zaporizka (27 percent) and Khersonska (23 percent) oblasts, and remains elevated in Donetska oblast (16 percent), while it is minimal in more stable areas such as Odeska oblast (1 percent). Displacement status shows the sharpest disruption to market access: evacuees rely on aid at 38 percent (around six times the level of permanent residents at 7 percent), and IDPs at 19 percent. Meanwhile, self-sourcing becomes a key coping strategy for older households: reliance on own-produced seed rises from 22 percent overall to 26 percent among households headed by someone 61 and above.

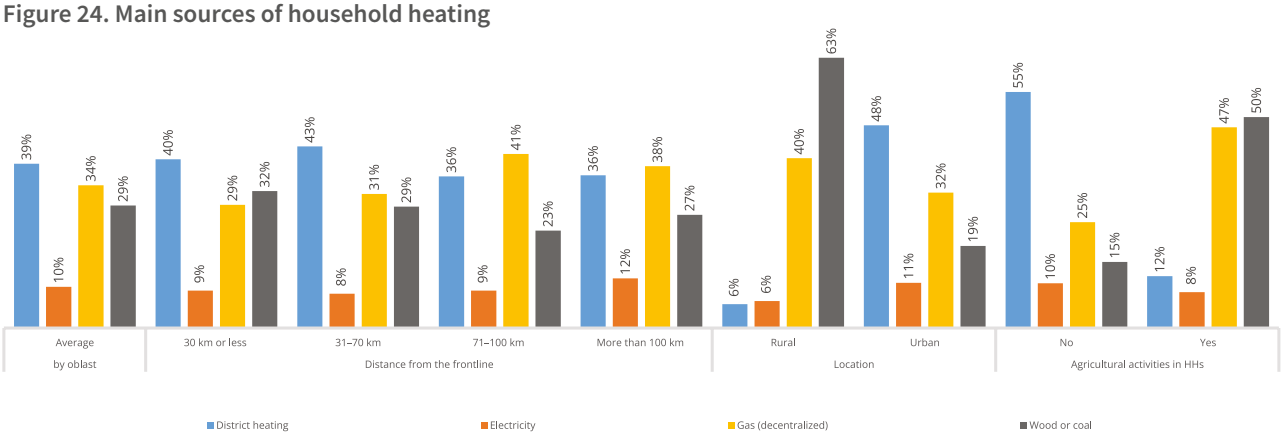
These input constraints carry directly into weak commercialization, which remains highly local and easily disrupted. Among selling households, marketing is dominated by farm-gate sales and local markets (43 percent each), leaving producers exposed to any breakdown in local infrastructure or security. Links to broader supply chains are limited – only 20 percent sell through wholesalers and 7 percent use digital channels – restricting the movement of surplus beyond the immediate area. As a result, urban producers tend to sell directly to consumers, while rural producers – historically more reliant on intermediaries – appear increasingly isolated where wholesale networks have deteriorated in higher-risk zones, pushing many back toward subsistence rather than market-oriented production.

Energy security and heating sources

Figure 24 shows that heating is shaped less by preference and more by where and how people live. In urban areas, the dominant backbone is district heating (48 percent), supported by decentralized gas (32 percent), while wood/coal is relatively minor (19 percent). In rural areas, the system flips: households heat mainly with wood/coal (63 percent) and decentralized gas (40 percent), and district heating is almost non-existent (6 percent), highlighting a much more household-managed and fuel-dependent model.

This divide is even sharper for livelihoods and displacement. Agricultural households rely heavily on solid fuel and gas (wood/coal – 50 percent, gas – 47 percent) and have very limited district heating (12 percent), underscoring exposure to fuel availability and winter price spikes. By contrast, IDPs look more urban: 55 percent use district heating and only 16 percent rely on wood/coal, suggesting that displacement often shifts households into apartment-style heating systems. Overall, across oblasts, the "average" mix is led by district heating (39 percent) and decentralized gas (34 percent), with wood/coal (29 percent) and electricity (10 percent) filling the gaps – yet oblasts like Donetska (40 percent) and Sumska (39 percent) stand out for especially high reliance on wood/coal.

Figure 24. Main sources of household heating



Source: Authors' own elaboration.

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Humanitarian assistance and priority needs

Access to humanitarian assistance

Humanitarian aid currently reaches approximately 23 percent of households across the nine frontline oblasts, functioning as a critical but highly targeted stabilization mechanism. With 77 percent of the population reporting no external assistance, the response acts primarily as an emergency safety net for the acutely vulnerable, leaving the majority of whom face severe financial strain – reliant solely on state social payments and diminishing savings.

Geographically, distribution is heavily skewed toward the war intensity; aid penetration peaks in “red zones” like Donetska and Khersonska oblasts (reaching nearly half the population) where markets have failed, while dropping to roughly 17–18 percent in more stable regions like Dnipropetrovska oblast.

Despite the logistical difficulty of reaching isolated rural settlements compared to dense urban centres, coverage remains relatively balanced between the two, indicating that mobile teams have successfully bridged the “last-mile” gap. However, the overlap between state benefits and external support has created minor beneficiary confusion regarding entitlements, underscoring the complexity of the aid landscape.

Profile of assistance modalities

Humanitarian assistance remains heavily skewed toward immediate life-saving interventions, with “basic support and nutrition” (food parcels, hygiene) reaching 59 percent of beneficiaries. This dominance reflects the reality that nearly 20 percent of households rely on aid as their primary food source, essentially functioning as a caloric substitute for unaffordable market purchases.

A strategic, albeit early, shift toward resilience is evident, with livelihood support (agricultural inputs, cash-for-work) reaching 23 percent of beneficiaries. Simultaneously, housing and energy support serve 18 percent of the population, providing a critical winter lifeline for rural households dependent on solid fuel and facing widespread infrastructure damage.

Conversely, complex service provision remains marginal, with health support reaching only 6 percent of beneficiaries and safety aid (including mine action) accounting for a negligible 1 percent. This “stop-gap” model leaves critical needs regarding chronic illness and contamination underserved. As the war protracts, expanding the aid portfolio beyond basic consumables to include structural support will be essential to restore household agency and foster long-term resilience.

Priority needs: household essentials and agricultural needs

Needs over the coming six months are shaped by two intertwined pressures: household survival requirements through winter and the ability to sustain basic agricultural production. Housing and energy emerge as the most urgent household priority, especially in rural areas (59 percent) compared with urban centres (44 percent), reflecting rural dependence on solid fuel and older housing stock versus urban concerns around utility reliability. At the same time, basic support and nutrition remain a major need – prioritized by 48 percent of urban households and 40 percent of rural households – showing that many families are still unable to stabilize economically. Healthcare is another significant gap, cited by 37 percent of households, consistent with the high burden of chronic illness and the high cost of medicines among older "stay-behind" populations. Alongside these immediate needs, a sizeable minority is looking toward recovery: 24 percent of urban and 21 percent of rural households prioritize livelihood support, suggesting demand for employment opportunities and productive assistance rather than continued reliance on transfers. Legal support is less frequently cited, but it can be a critical bottleneck that blocks access to entitlements and services.

Agricultural priorities reinforce this picture of constrained resilience. While 35 percent of households report no need for agricultural assistance – either due to self-sufficiency or disengagement – the majority identify a clear set of input gaps. The top needs are seeds for cereals and vegetables (26 percent), fertilizers and pesticides (20 percent), and animal feed (18 percent), while structural services such as veterinary care, storage, and livestock housing remain secondary and mostly in single digits. Regional differences are stark: Khersonska is the most pressured oblast, with only 17 percent reporting "no need," and correspondingly the highest demand for seeds (34 percent), animal feed (33 percent), fertilizers (30 percent), and fuel (11 percent). By contrast, Odeska and Dnipropetrovska oblasts appear comparatively more stable, with over 40 percent of households requiring no external agricultural support. Secondary needs – machinery services, small greenhouses and fuel – typically average 5–7 percent, but energy gaps are not uniform: Mykolaivska oblast reports the highest demand for fuel/electricity (12 percent), pointing to a distinct pocket of energy insecurity.

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Conclusion

As the war in Ukraine enters its fifth year, the humanitarian and economic context in frontline areas remains highly volatile, with active hostilities and infrastructure damage severely undermining household resilience. While the number of food-insecure people has reduced since 2024 due to evacuations and sustained aid, food insecurity remains critical in areas affected by active combat, with 10.8 million people projected to require humanitarian assistance in 2026. The demographics of the "stay-behind" population are characterized by deep structural vulnerabilities, particularly among the older- and women-headed households who predominate in rural areas, while younger demographics are more prevalent among displaced populations in urban centres.

Economic fragility is a defining feature of the surveyed households, who rely heavily on fixed state transfers such as old-age pensions and social benefits rather than market-based employment. Financial wellbeing is deteriorating, with one-third of households reporting decreased income over the past year because of job losses and inflation that outpaces earnings. The financial resilience of the population is critically low, as 78 percent of households possess no savings, and over 33 percent hold debt, much of which has accrued or increased since the war escalation in 2022.

In this environment of economic hardship, subsistence agriculture serves as a vital safety net, with 40 percent of households engaged in farming, primarily for self-consumption. Engagement in agriculture acts as a buffer against food insecurity, as farming households consistently report better food security outcomes compared to non-farming households. However, the sector is contracting, with a shift away from complex livestock rearing toward labour-intensive, small-scale horticulture like vegetable production, which is practiced by 36 percent of households.

Agricultural production faces severe structural constraints that limit its potential as a recovery driver. Producers are struggling with a lack of essential inputs such as seeds, fertilizers, and animal feed, as well as the contamination of land by mines and unexploded ordnance. Supply chains for these inputs are disrupted in high-risk zones, forcing many farmers to rely on lower-quality seeds from their own production rather than commercial suppliers. Additionally, the mobilization of males has created labour shortages, affecting 20 percent of households and reducing the capacity for field operations and equipment repair.

Food security remains a significant challenge, with 22 percent of the population in frontline oblasts classified as moderately or severely food insecure. A distinct rural-urban divide exists regarding food access: rural households achieve higher self-sufficiency through their own harvests, while urban households are heavily dependent on markets and are thus more vulnerable to price inflation and supply chain disruptions. In areas closest to the frontline, reliance on humanitarian aid becomes a primary food source for over a third of the population, highlighting the breakdown of normal market mechanisms in "red zones".

The exhaustion of coping capacities is evident, with 76 percent of households resorting to negative coping strategies to meet essential needs. Crisis and emergency strategies, such as reducing health and education expenditures or selling productive assets, are becoming commonplace, particularly among displaced populations and women-headed households. This erosion of assets threatens long-term recovery, as households deplete the resources necessary to rebuild their livelihoods once stability returns.

Market infrastructure shows resilience but faces “last-mile” challenges. While 87 percent of supermarkets remain fully operational, local markets in war-affected regions like Donetska oblast operate at reduced capacity, limiting access for those unable to travel to urban centres. The commercialization of household agriculture remains low, with 86 percent of households selling nothing, indicating that farming is currently a survival mechanism rather than an economic engine.

Energy security poses a critical looming threat as winter approaches, with distinct vulnerabilities between urban and rural populations. Urban residents rely heavily on centralized district heating and electricity, making them vulnerable to grid attacks, while rural households depend on solid fuels like wood and coal, which are physically and financially difficult to source in mined areas. Housing and energy support have consequently emerged as the single most critical priority need for households in the coming six months.

Humanitarian assistance continues to play a stabilizing role, reaching approximately 23 percent of households, but significant coverage gaps remain. The current aid profile is dominated by immediate life-saving interventions like food parcels and hygiene kits, with limited reach for livelihood support or complex services. While this emergency aid is essential for survival, the low penetration of agricultural support programmes suggests missed opportunities to foster self-reliance.

To support sustainable recovery, the response must shift from purely humanitarian relief to targeted livelihood interventions. Priorities include restoring access to agricultural inputs, supporting winterization needs, and expanding cash-based assistance to help households address diverse needs like healthcare. Targeted support is particularly urgent for the most vulnerable groups, such as IDPs, women-headed households and those in the immediate frontline zone, to prevent further destitution and support the rebuilding of household resilience.

Annex: Composite livelihoods severity analysis methodology

Overview

The livelihoods coping strategies index (LCSI) is a composite indicator designed to measure the depth of socioeconomic distress among conflict-affected households. By integrating multiple dimensions of vulnerability, the LCSI identifies populations where essential survival and production mechanisms are under critical strain. This analysis informs the Food Security and Livelihoods Cluster severity of needs classification for the 2026 Humanitarian Needs and Response Plan (HNRP).

Analytical framework

The methodology utilizes a multi-dimensional "maximum severity" approach. This ensures that if a household is experiencing extreme distress in even one critical area (e.g., a total loss of income), they are classified according to that highest level of need, preventing acute vulnerabilities from being "averaged out."

The analysis is built on three core pillars:

- Shock exposure: frequency and variety of recent crises affecting food/income production.
- Income stability: shifts in purchasing power, income loss and reliance on debt or savings.
- Production capacity: changes in agricultural (crop and livestock) outputs and associated input costs.

Classification criteria (four-point scale)

Each pillar is categorized into four levels of severity, from L1 (minimal/no stress) to L4 (extreme/catastrophic stress).

Level	Severity	Description
L1	Low	Household maintains stable income and production; no significant shocks.
L2	Moderate	Slight decrease in production/income (<25%) or exposure to a single shock.
L3	High	Significant loss of assets or income (25-50%); multiple shocks recorded.
L4	Extreme	Drastic losses (>50%), total production stoppage or reliance on debt/savings.

Step-by-step integration process

Step 1. Indicator selection & coding

Relevant survey questions are mapped to the three pillars. Responses are coded numerically (1 to 4) based on the pre-defined thresholds (e.g., a >50% income drop is coded as "4").

Step 2. Component scoring

For each household, individual scores are assigned to:

- Shock component: based on the number of crisis types reported.
- Income component: derived from the worst-performing sub-indicator (either the income bracket or the percentage of decrease).
- Production component: derived from the worst-performing sub-indicator across crops and livestock (yield decrease or cost increase).

Step 3. Determination of final severity (the "Max Rule")

The final livelihoods severity score is determined by selecting the highest level observed across any of the pillars.

Livelihoods severity = max (shock, income, production)

Example: If a household has L1 shock and L2 production, but L4 income, the final classification is L4.

Step 4. Aggregation and vulnerability profiling

The resulting data is aggregated by geography (oblast), residence status (IDP vs returnee), and demographic characteristics (gender/age of the head of a household) to identify the "epicentre" of the crisis.

Application for HNRP 2026

This methodology provides a standardized evidence base for the FSLC. By highlighting that 66 percent of households currently reside in L3 or L4 severity, the analysis justifies prioritized intervention in frontline areas (like Khersonska oblast) and for specific vulnerable groups (rural, women-headed households, and those headed by people over the age of 60) who are absorbing the greatest shocks.

Notes

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Saving livelihoods saves lives

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