FEWS NET
Famine Early Warning Systems Network

Global Food Security Update: May to September 2025 — May 20, 2025

About this Report

- **The Famine Early Warning Systems Network (FEWS NET) is resuming its critical mandate of reporting on acute food insecurity around the world.** As the leading global provider of independent and evidence-driven early warning and analysis of food crises and famine for four decades, FEWS NET resumed reporting functions in early May 2025 after briefly suspending operations during a review of United States foreign assistance programs. FEWS NET remains committed to providing timely, actionable insights to support efficient responses to emerging food crises around the world.

- **This report is FEWS NET's first food security update since late 2024/early 2025.** It provides a broad overview of the current landscape of food security, with particular emphasis on major events and trends that have occurred in recent months and the expectations for trends in acute food insecurity through September 2025. This report serves as a transitional product while the FEWS NET program gears back up and works to resume operations across all covered geographies.

- **This analysis is grounded in FEWS NET's foundational approach**, which starts with an understanding of local livelihoods as a basis for interpreting the ways in which various shocks – such as conflict, economic instability, and weather-related hazards – affect households' ability to obtain the food and cash income they need to survive. While this report is not as granular as typical FEWS NET products, it relies on the same rigorous convergence of available evidence to assess locally specific risks of acute food insecurity.

- **The geographic scope of this report aligns with the level of concern for acute food insecurity outcomes.** While the report is global in scope, it includes more in-depth coverage for countries or regions where the scale and severity of food crises warrant urgent concern. However, unlike FEWS NET's typical monthly or quarterly reports, this product does not offer subnational, IPC-compatible classifications or updated estimates of the number of people in need (PIN) of humanitarian food assistance. As operations scale back up, these important features will return.

- **FEWS NET will progressively restore its full reporting capacity.** In the coming months, decision makers can expect to see the reintroduction of the full suite of FEWS NET's monthly products, including Food Security Outlooks, Food Security Outlook Updates, Key Messages, and Price Watches.

- **The analysis presented in this report is based on information available as of May 12, 2025.**

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Conflict and economic instability drive high needs as assistance declines

Starvation persists in Sudan and re-emerges in Gaza; South Sudan and Yemen also continue to face severe acute food insecurity emergencies

Two years of conflict drives Famine in Sudan as conflict escalates despite the recapture of Khartoum; in Gaza, an ongoing blockade is leading to rapidly worsening food shortages

Sharp deterioration in conflict dynamics leads to worsening food insecurity outlook in South Sudan and Yemen, as cholera contributes to high malnutrition prevalence

Conflict, extreme weather, and economic challenges are also causing high needs in the Horn of Africa, Haiti, the Democratic Republic of the Congo (DRC), the Sahel, and Nigeria

Key messages

- As the global food security landscape and humanitarian response capacity undergoes significant change, large-scale food assistance needs persist across East Africa, parts of West and Southern Africa, conflict-affected areas of the Middle East, Afghanistan, and Haiti. Acute food insecurity is expected to increase between June and September in many geographies covered by FEWS NET. The scale and severity of acute food insecurity is highest in Sudan and Gaza, where exhaustive measures are urgently required to ensure multi-sectoral humanitarian assistance can prevent further loss of life. Concern is also high for South Sudan; Yemen; northern and southern Ethiopia; Somalia; Haiti; the eastern DRC; the Liptako-Gourma region in the Sahel; and northern Nigeria, where humanitarian food and nutrition assistance is critical to saving lives and protecting livelihoods.
- **Recent freezes and ongoing reductions of donor funding** are forcing cuts to food, nutrition, and agricultural assistance programs. At the same time, the uncertainty of trade relationships has led to a downward revision in projections for global economic growth for the year, and there is concern that shifts in agricultural trade flows may place upward pressure on prices even though global commodity markets are well supplied. Amid local and regional conflict, economic, and weather shocks, these combined pressures are increasing the risk of acute food insecurity among many poor households worldwide.
- **Conflict** remains the leading cause of acute food insecurity. Ongoing violence continues to displace millions, disrupt agricultural systems, and obstruct humanitarian assistance delivery. Sudan and Gaza are experiencing the most extreme levels of acute food insecurity due to prolonged, intense conflict and associated restrictions to the delivery of life-saving humanitarian assistance. Elsewhere, violence and political instability are also driving high food assistance needs in South Sudan, Yemen, the Democratic Republic of Congo, Haiti, the Sahel, Ethiopia, and Somalia.
- **Economic instability** in many of the countries monitored by FEWS NET is undermining access to food, particularly in import-dependent countries. The impacts are most pronounced in countries where conflict is a significant disruptor to trade flows and market functionality and has led to protracted macroeconomic crises, such as in Sudan, South Sudan, Yemen, and Haiti. Despite a decline in global commodity prices since 2022, domestic food prices remain high due to inflation, currency depreciation, and localized supply chain constraints. These trends disproportionately affect poor households who rely on market purchases and strain government capacity to respond to increasing needs.
- **Weather shocks** continue to threaten agricultural production in many rural livelihood zones. Although La Niña ended in March 2025 and ENSO-neutral conditions currently exist, irregular rainfall, dry spells, and flooding are still negatively affecting crop and livestock production, agricultural labor demand, and associated household income in several regions. Weather-related reductions in farm productivity are of greatest concern in areas concurrently affected by conflict or recovering from prior historic weather events, such as in parts of South Sudan, Ethiopia, and Somalia.

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Global overview

Key drivers of acute food insecurity through September 2025

In 2025, the global outlook for acute food insecurity is driven by a convergence of protracted conflict, economic volatility, and adverse weather conditions. While the nature, combination and severity of shocks varies by context, the compounded impacts continue to disrupt food systems, constrain access to typical livelihood activities, and impede humanitarian operations. Conflict remains the most severe and widespread driver, particularly in settings with protracted violence or rising geopolitical tensions in East Africa, the Middle East, the Sahel, Central Africa, and Haiti. The intersection of insecurity, inflation, and limited humanitarian access presents critical concerns across the most affected regions.

Economic fragility – marked by high food prices, inflation, and weak currencies – continues to undermine purchasing power and government capacity to respond. While global agricultural commodity markets remain relatively well-supplied with easing prices, the impact of improved international prices on household access to food in many low-income countries is limited, outweighed by a reliance on regional supply, and/or the localized impacts of conflict, natural disasters, and poor national economic conditions. An additional component of economic volatility is the uncertainty regarding tariff developments and associated uncertainty regarding U.S. economic and trade policy. The 90-day pause on U.S. tariff adjustments beyond the 10 percent announced on April 2, 2025 (expiring July 8) has led economists to revise global economic growth forecasts downward. Analysis from the International Food Policy Research Institute (IFPRI) projects that shifts in trade policy could lead to a contraction in global agricultural trade of 3.3-4.7 percent and a decline in global GDP of 0.3-0.4 percent, with more severe impacts if retaliatory measures are implemented. These trade dynamics may reshape global agricultural market flows. Major regional exporters like South Africa may sell to new international markets in response to shifting trade relationships, with the potential to indirectly drive up prices in poorer, import-dependent neighboring countries as supplies are diverted. Meanwhile, for countries monitored by FEWS NET that export a significant share of agricultural commodities to the U.S., such as in Central America, reduced export earnings from cash crops (e.g., coffee, tea, horticulture) are possible. However, FEWS NET-monitored countries with exportable surpluses of staple grains, such as Ethiopia and Uganda, primarily supply other countries in their region and are not likely to be significantly affected.

While no major weather events are forecast in FEWS NET-monitored countries in the medium-term, erratic rainfall distribution, extreme heat, seasonal flooding, and an above-average Atlantic hurricane season still pose risks to agricultural production. Following the end of La Niña in March, ENSO-neutral conditions are forecast to prevail through at least September 2025, which are associated with less predictable global weather patterns and a reduced capacity to forecast weather anomalies at long lead times. Despite the relative increase in uncertainty, the residual effects of prior droughts and floods are expected to contribute to food insecurity in parts of southern Africa, eastern Africa, and Afghanistan. Additionally, available weather forecasts suggest rainfall patterns in Sudan, South Sudan, and West Africa may mirror those of 2024, bringing flooding to riverine, wetland, and low-lying areas and dry conditions in the Gulf of Guinea. If this materializes, the resultant loss of cereal crops, cash crops, and livestock will be most acute in areas already impacted by concurrent conflict and economic shocks.

Another critical concern is reductions to global humanitarian funding from major donors, which began with reductions from European donors prior to 2025 and are anticipated to continue based on donor budget proposals for fiscal year 2025/26, including from the U.S. The temporary suspension and subsequent elimination of some humanitarian aid programs in early 2025, coupled with anticipated cuts in funding for the next fiscal year, have either disrupted or prompted the downsizing of humanitarian operations in multiple crisis contexts. Six of the world's poorest countries received over 20 percent of their Official Development Assistance funds from the U.S. in 2023 – the bulk of which was categorized as emergency response to address acute needs – including South Sudan, Somalia, the Democratic Republic of the Congo (DRC), Afghanistan, Sudan, and Ethiopia. In South Sudan, Somalia, and Afghanistan, aid represented 20-25 percent of Gross National Income, suggesting cuts to assistance would not only directly reduce food and nutrition distributions at the household level but would also significantly affect local economies.

Regional Snapshot: East Africa

East Africa remains acutely affected by overlapping conflict and weather shocks, with the most extreme outcomes expected in Sudan, followed by South Sudan, Ethiopia, and Somalia. In late 2024, FEWS NET projected regional food assistance needs would exceed **50 million people** across Burundi, Ethiopia, Kenya, Somalia, South Sudan, and Uganda by May 2025 (Table 1). Humanitarian food assistance needs are expected to rise between May and September with a peak in July/August, coinciding with the main lean season in **Sudan**, **South Sudan**, and **Ethiopia** amid forecasts of heavy rainfall and a risk of flooding, which threaten to wash out roads, disrupt trade flows, impede humanitarian access, and spread ongoing cholera outbreaks, leading to widening food consumption gaps and rising malnutrition levels.

In **Sudan**, conflict between the Sudanese Armed Forces and the Rapid Support Forces is expected to persist unabated in western Sudan despite the likely de-intensification of conflict in central Sudan and Khartoum, resulting in large-scale displacement and severe disruptions to agricultural markets. The Rapid Support Force's increased use of drones, particularly in strategic eastern areas like Port Sudan and Kassala that were previously considered safe havens, marks a dangerous shift in warfare that threatens to deepen insecurity, disrupt humanitarian aid operations, and further prolong the conflict. Humanitarian access remains hindered by conflict, bureaucratic red tape, and high operational costs, leaving millions to face widening food consumption gaps or outright starvation during the May to September lean season. The Sudan crisis continues to have regional implications, with nearly 4 million people having fled across borders since 2023. In neighboring **Chad**, border crossings have surged due to intensifying violence in Sudan's Greater Darfur region, with nearly 20,000 Sudanese refugees – mostly women and children – arriving from late April to early May 2025, overwhelming a country already hosting an estimated 794,000 Sudanese who fled since April 2023. In **South Sudan**, escalating political tensions, the effective breakdown of the 2018 peace agreement's implementation, and recent armed clashes between government and opposition forces signal a moderate-to-high likelihood of renewed civil strife, particularly in the north.

In **Ethiopia**, protracted hostilities in Amhara Region, simmering tensions in Tigray, and recent friction with Eritrea are contributing to population displacements and disruptions to labor and trade. These factors, combined with a poor *belg* rainfall season and drought in northern pastoral areas and parts of the pastoral south, are expected to place mounting strain on food availability and access until the *meher* harvest begins in September. Meanwhile, the benefits of favorable rainfall during southern **Somalia**'s *gu* cropping season will be offset by very dry conditions in northern and central areas, localized flash floods, and conflict-related disruptions to agricultural and market activity. Livestock-dependent households in the center-north, as well as agropastoral and displaced populations affected by crop losses and reduced labor demand, are of greatest concern.

Reductions in humanitarian funding pose serious challenges to food and nutrition assistance in East Africa. In Sudan, where contributions from the U.S. accounted for 45 percent of all humanitarian funding in 2024, cuts to nutrition programs, general food assistance, and community kitchens are undermining capacity to save lives at a critical juncture when WFP and other aid actors have recently gained access to previously inaccessible areas in Khartoum, South Kordofan, and Al-Jazirah. In South Sudan, where more than one in three people received some form of emergency food assistance in 2024 and foreign donors fund 80 percent of the healthcare system, aid organizations report entering "uncharted territory" as funding cuts are resulting in reductions in the number of food assistance recipients, ration sizes, and health services.

Regional Snapshot: Southern Africa

Southern Africa faces a mixed food security outlook, marked by intensifying conflict in the DRC and Cabo Delgado, Mozambique, and macroeconomic instability on the one hand and improved agricultural production in 2025 on the other. In late 2024, FEWS NET projected regional food assistance needs would reach the range of **20.0-24.99 million people** across Angola, the DRC, Lesotho, Madagascar, Malawi, Mozambique, and Zimbabwe by May 2025 (Table 1). Following the 2023/24 El Niño-induced drought, the October 2024-April 2025 main rainy season[1] delivered generally average to above-average rainfall across most of the region, significantly benefiting crop development. The 2025 main harvest, which is typically completed by May in most of the region, is expected to drive substantial improvements in food availability,

[1] The 2023/24 drought and the main rainy season in southern Africa does not apply to the DRC, which has different seasonal patterns.

affordability, and income from agricultural labor and sales. However, production gains will likely be more limited in areas experiencing late-season rainfall deficits (southern Angola, northern Malawi, eastern Madagascar); areas where cyclones caused damage in late 2024 and early 2025 (north-central Mozambique, southern Malawi, and multiple regions of Madagascar); and in Mozambique's Cabo Delgado province.

In eastern **DRC**, M23 fighting is projected to persist at moderate-to-high intensity despite ongoing peace talks in Doha, while Allied Democratic Forces (ADF) attacks against civilians in northern North Kivu and Ituri provinces will likely continue at similar levels as in 2023-2024. In **Mozambique**'s Cabo Delgado, Islamic State Mozambique Province (ISMP)-linked violence is expected to continue with anticipated intensification during the June-October dry season as militants target vulnerable communities for resources, particularly in areas impacted by Cyclone Chido in December 2024. Both conflicts continue to disrupt agricultural activities, displace populations, and hinder humanitarian access.

Malawi, which has seen consecutive years of drought and cyclone-induced flooding, has been particularly hard hit by the combined effects of weather and economic shocks since 2020. Crop failures in 2023/24 led to below-average domestic cereal availability and heightened reliance on imports, and rising inflation has eroded household purchasing power. Economic constraints are also limiting the government's ability to scale up social safety nets. In **Zimbabwe**, long-term macroeconomic pressures have also weakened rural livelihoods. Economic pressures may be further exacerbated by global trade tensions should high "reciprocal tariff" rates imposed by the U.S. materialize by July. **Madagascar**, in particular, faces both a high tariff (47 percent) and a relatively high share of agrifood exports to the U.S. by regional standards (11 percent).

Regional Snapshot: West Africa

In West Africa, food insecurity is expected to worsen during the northern region's June-August lean season in areas where entrenched conflict and political instability are disrupting agricultural production, markets, and trade. In late 2024, FEWS NET projected regional food assistance needs would reach the range of **20.0-24.99 million people** across Burkina Faso, Cameroon, Central African Republic, Chad, Mali, Niger, Nigeria, and Togo by May 2025 (Table 1). In the Sahel, conflict between violent extremist organizations (VEOs) and government forces continues to displace civilians and undermine access to food, especially in northern and eastern **Burkina Faso**, northern and central **Mali**, and the borderlands of **Niger**. Military takeovers in these countries have further disrupted governance and prompted reductions in some international donors' support. Violence is also spilling into coastal states like **Togo**, marked by an inflow of thousands of refugees. VEO activity in the Lake Chad basin also persists, exemplified by attacks on rural communities in northern **Nigeria** and clashes in **Cameroon**'s Far North Region. Fighting between separatist and government forces is also expected to increase in Cameroon's Northwest and Southwest regions in advance of elections in late 2025. Meanwhile, the spillover of the Sudan conflict is materializing in cross-border attacks and heightened intercommunal tensions in eastern **Chad**. In the **Central African Republic**, clashes between rebels and government forces also continue, albeit at a lower intensity since 2021.

Beyond conflict, below-average rainfall in the Gulf of Guinea and the likelihood of flash floods in riverine areas of the Sahel present a likely hazard to agricultural production. However, the extent of crop losses will depend on the distribution of rain at critical crop development periods, which is difficult to predict at long lead-times. Additionally, in **Nigeria**, high agricultural input costs and reduced access to credit, which are partially attributed to elevated interest rates, will likely impede national crop production this year. Food supplies are expected to seasonally decline through August while food prices will seasonally increase, reducing household access to food until the onset of the 2025 harvest in September.

Economic challenges such as inflation, high food prices, and currency depreciation will also continue to constrain household purchasing power in both urban and rural areas. Higher interest rates in advanced economies are expected to slow capital flows to the region, limiting foreign reserves and adding inflationary pressure. Of particular concern are countries with relatively higher shares of agrifood exports to the U.S., such as Togo (11 percent), which may face reduced export earnings should the country face an increase in tariffs on its exports by July.

Reductions in humanitarian aid to the region present an additional concern. In Burkina Faso, for example, confirmed donor funding for food security assistance in 2025 currently stands at USD 49.5 million, just 23 percent of total food security assistance received in 2024. WFP, the largest implementing partner for donor-funded assistance, anticipates scaling back aid operations to conflict-affected areas of the Sahel and refugee populations hosted in Sudan and Mauritania.

Regional Snapshot: Middle East and Afghanistan

The Middle East regional conflict that began in October 2023 continues to drive severe food insecurity in Gaza, Lebanon, and Yemen in 2025. While FEWS NET's prior reporting on Gaza did not include projections out to May 2025, FEWS NET anticipated up to 17.0-17.99 million people in Yemen and 2.0-2.49 million people in Lebanon would need food assistance (Table 1). In **Gaza**, which is the world's second-worst food security crisis after Sudan, the reopening of borders and surge in food and nutrition supplies during the January-March 2025 ceasefire was instrumental in averting extreme levels of acute malnutrition and hunger-related mortality. However, Israel's complete blockade since March 2025 has prevented any humanitarian and commercial supplies from entering, depleting stockpiled food and bringing renewed market collapse. If current conditions hold, Gaza faces widespread starvation over the next five months. If the entry of food supplies resumes, the severity of acute food insecurity will be contingent on the timing and duration of implementation, modality of food distribution, the share of the population that can access food, and the volume and frequency of food consumption. In **Lebanon**, acute food insecurity persists despite the November 2024 ceasefire due to widespread damage to infrastructure, disruption to agricultural production, and associated economic constraints after years of macroeconomic crisis.

The multi-front crisis also continues to contribute to food insecurity in **Yemen**, as attacks perpetrated by Ansar Allah (the Houthis) on international shipping in the Red Sea triggered retaliatory, elevated strikes by Israel and the U.S. in late 2024 and early 2025, placing pressure on imported food availability, distribution, and affordability. Economic conditions across Yemen are extremely poor, with areas under Internationally Recognized Government (IRG) control seeing sharp currency depreciation and rapid food inflation due to the Houthi blockade of the IRG's oil exports. The termination of food assistance funding to Yemen from the U.S. – Yemen's second-largest donor of official development assistance in 2024 – foreshadows future challenges in food assistance delivery, though WFP has been able to maintain planned deliveries through April. Additionally, an atypically dry spring rainy season is expected to reduce spring cereal crop yields, and forecasts of above-average rainfall from June to September will not yield benefits until the main harvest in late 2025.

In **Afghanistan**, where FEWS NET previously projected 8.0-8.99 million people in need in May 2025, moderate economic growth and an above-average cereal harvest in 2024 have been offset by structural challenges, including political isolation. The return of over 3.5 million Afghans from Iran and Pakistan since 2023 has created significant pressure on limited resources, with returnees facing severe challenges reestablishing livelihoods amid saturated labor markets and missed crop planting windows. Suspensions, followed by cancellations, in food assistance funding has caused many organizations to suspend or close their services. The combination of restrictive Afghan policies, isolation from international financial systems, and declining foreign assistance will likely sustain substantial acute food insecurity through September, especially among returnees, poor labor-dependent households, and rural communities in the central and northern highlands.

Regional Snapshot: Latin American and the Caribbean

FEWS NET previously projected **4.0-5.99 million** people would need food assistance in Central America and Haiti by May 2025 (Table 1). **Haiti** faces the region's most severe acute food insecurity crisis amid a state of near-total institutional collapse and escalating gang violence that has severely disrupted trade, markets, and basic services in Port-au-Prince and surrounding areas. Gang control of key supply routes and illegal taxation of essential goods, in particular, directly affects physical and financial access to food. The crisis has triggered massive displacement, with the number of displaced people rising by nearly 50 percent between June and December 2024 to reach 1.04 million people. The situation is expected to deteriorate further in the coming months, with no clear pathway to political stabilization or improved security conditions.

In Central America's **Dry Corridor**, dry conditions and elevated food prices continue to affect household access to food among subsistence farmers and poor urban households. Economic challenges may be compounded by trade tensions. Central American countries like Guatemala, Honduras, and El Salvador are vulnerable to changes in U.S. tariff and migration policies, with 23-40 percent of their agricultural exports destined for the U.S. market based on available trade data from 2023 and high reliance on migrant remittances. Analyses from IFPRI and the World Bank suggest these economies may experience a modest contraction in economic growth should export revenue decline.

Table 1. FEWS NET's assessment of humanitarian food assistance needs. This table captures the projections FEWS NET produced in late 2024 – which extended to May 2025 in all geographies except Gaza – and extrapolates FEWS NET's comparative level of concern for the severity of acute food insecurity over the next four months from June to September 2025.

FEWS NET-monitored geography as of December 2024	FEWS NET's highest **projected** area-level IPC Phase classification by **May 2025**	FEWS NET's **projected** estimated population in need by **May 2025**	FEWS NET's **projected** population in need by **May 2025** as a % of the total population	FEWS NET's current level of concern from **June to September 2025**
Afghanistan	Crisis (IPC Phase 3)	6.0-6.99 million	15-20%	Moderate
Angola	Crisis (IPC Phase 3)	1.0-1.49 million	<5%	Moderate
Burkina Faso	Emergency (IPC Phase 4)	1.4-1.99 million	5-10%	High
Burundi	Stressed (IPC Phase 2)	500,000-749,999	5-10%	Low
Cameroon	Crisis (IPC Phase 3)	1.5-1.99 million	5-10%	Moderate
Central African Republic	Crisis (IPC Phase 3)	500,000-749,999	10-15%	Moderate
Chad	Crisis! (IPC Phase 3!)	1.5-1.99 million	10-15%	Moderate
DRC	Crisis! (IPC Phase 3!)	14.0-14.99 million	10-15%	High
El Salvador	Stressed (IPC Phase 2)	100,000-249,999	<5%	Low
Ethiopia	Emergency (IPC Phase 4)	14.0-14.99 million	10-15%	High
Gaza	N/A	N/A	N/A	Very high
Guatemala	Crisis (IPC Phase 3)	2.0-2.49 million	10-15%	Low
Haiti	Emergency (IPC Phase 4)	2.0-2.49 million	20-25%	High
Honduras	Stressed (IPC Phase 2)	500,000-749,999	5-10%	Low
Kenya	Crisis (IPC Phase 3)	2.5-2.99 million	5-10%	Low
Lebanon	Crisis (IPC Phase 3)	2.0-2.49 million	35-40%	Moderate
Lesotho	Crisis (IPC Phase 3)	100,000-249,000	5-10%	Low
Madagascar	Crisis (IPC Phase 3)	1.0-1.49 million	<5%	Moderate
Malawi	Crisis (IPC Phase 3)	3.0-3.49 million	5-10%	Moderate
Mali	Emergency (IPC Phase 4)	750,000-999,999	<5%	High
Mozambique	Crisis (IPC Phase 3)	2.0-2.49 million	5-10%	Moderate
Niger	Crisis (IPC Phase 3)	2.0-2.49 million	5-10%	Moderate
Nigeria	Emergency (IPC Phase 4)	13.0-13.99 million	5-10%	High
Somalia	Emergency (IPC Phase 4)	4.0-4.99 million	25-30%	High
South Sudan	Emergency (IPC Phase 4)	7.0-7.99 million	60-65%	High
Sudan	Famine (IPC Phase 5)	20.0-20.99 million	40-45%	Very high
Togo	Crisis (IPC Phase 3)	250,000-499,999	<5%	Low
Uganda	Crisis (IPC Phase 3)	1.5-1.99 million	<5%	Moderate
Venezuela	Stressed (IPC Phase 2)	1.0-1.49 million	5-10%	Low
Yemen	Emergency (IPC Phase 4)	17.0-17.99 million	50-55%	High
Zimbabwe	Crisis (IPC Phase 3)	1.0-1.49 million	5-10%	Low

Food security outlook through September 2025 in geographies of high concern

Sudan

Amid widespread starvation, lifesaving aid is reaching less than 1 in 5 people in need

Two years of conflict between the Sudanese Armed Forces (SAF) and the Rapid Support Forces (RSF) is driving a humanitarian catastrophe in Sudan, with over 20 million people in need of urgent humanitarian food assistance. Famine (IPC Phase 5) emerged in North Darfur and the Nuba Mountains in 2024, and the continued impacts of conflict on displacement, agricultural production, market functionality, economic performance, and health and sanitation services signals Famine (IPC Phase 5) will likely persist in areas of Sudan during the May-September 2025 lean season. The spread of starvation is of particularly dire concern in Al-Fasher and surrounding localities in North Darfur, exemplified by the RSF's indiscriminate attacks against civilians in the Zamzam camp for internally displaced persons (IDPs) in April. Meanwhile, in areas where the SAF's recent advances have enabled nascent improvement in humanitarian and commercial access – namely in South Kordofan, Khartoum, Al-Jazirah, and Sennar – actions to alleviate severe hunger remain imperative. Efforts to secure expanded humanitarian access, scale up food and nutrition assistance, support conflict mitigation efforts, and facilitate market recovery and the cultivation of 2025/26 crops are critical in order to save lives during and after the 2025 lean season.

North Darfur

Conditions in North Darfur have deteriorated dramatically following the RSF's attack and capture of Zamzam IDP camp in April. An estimated 406,265 people (around 80 percent of the camp's population) have fled Zamzam to neighboring Tawila locality (around 303,300 people), Al-Fasher town (around 83,890 people), and other areas across North Darfur in the aftermath of extrajudicial executions, sexual violence, and the wholesale destruction of camp infrastructure. These host communities also face severe to extreme hunger, and scarce resources are increasingly under strain amid the influx of new arrivals. Al-Fasher town remains under a year-long siege by the RSF marked by heavily restricted food supplies and extremely high food prices, with recent RSF attacks severing the eastern and southern supply routes. Only the northern Al-Fasher-Mellit Road maintains minimal activity, with significant insecurity and exorbitant transportation costs due to RSF checkpoints. Given that Al-Fasher remains the lynchpin through which the RSF would consolidate full control over Greater Darfur, the siege of the town, attacks on non-Arab communities in nearby IDP camps and rural villages, and repeated population displacement are expected to intensify in the medium-term.

In September 2024, 34 percent of the 29,300 children screened by Médicins Sans Frontières (MSF) in Zamzam were acutely malnourished. In Tawila, where many Zamzam IDPs have fled, MSF similarly found a global acute malnutrition rate of 35.5 percent in December 2024, with 7 percent suffering from severe acute malnutrition. When paired with a statistically representative survey in January 2024, these findings suggested acute malnutrition levels were above the thresholds used to classify Famine (IPC Phase 5). Since then, the further decline in food availability and affordability, coupled with disrupted treatment of acutely malnourished children, is expected to worsen levels of malnourishment and mortality. In the week following the influx of IDPs from Zamzam, MSF reported a tenfold increase in children under five suffering from severe acute malnutrition in Tawila.

Humanitarian access to the remaining population of Zamzam IDP camp, Al-Fasher town, and Abu Shouk IDP camp, as well as the surrounding areas of Tawila, Al-Lait, At-Taweisha, Um Kedaddah, and Melit, is severely constrained by ongoing hostilities, a lack of security guarantees, abduction of aid workers, looting, attacks on convoys, fuel shortages, and communication blackouts. Amid these challenges, life-saving assistance has reached a fraction of the population in need. Between April 24-29, WFP delivered over 1,600 metric tons (MT) of food and nutrition assistance to Tawila, enough to feed 220,000 people for one month; an additional 1,000 MT is en route from Port Sudan. The delivery and pre-positioning of more supplies is vital ahead of the rainy season, when roads become impassable.

Greater Kordofan

In South Kordofan, siege-like conditions in Dilling and Kadugli have eased relative to 2024 following SAF advances against RSF in January and February. The recapture of Al Debebate town north of Dilling has improved access through the main road linking North and South Kordofan, permitting a relative increase in commercial supply flows and the first delivery of in-kind, large-scale humanitarian food supplies (800 MT) and cash-based transfers to the Western Nuba Mountains since the current conflict began. However, routes to rural areas around Dilling (Western Nuba Mountains) remain largely inaccessible under the Sudan People's Liberation Movement-North (SPLM-N)'s control. While limited price monitoring data suggest a downward trend in cereal prices, total supply is far below normal and local cereal prices in Dilling and Kadugli remain among the highest relative to the national average. Additionally, WFP's delivery of nearly 800 MT of food assistance in March was only sufficient to support 64,000 people. Concerted efforts to improve food supply flows and to ensure the population has financial access to available food are essential for saving lives as the lean season progresses, as unstable conflict dynamics will otherwise likely hinder further gains. In March and April, tensions escalated between the SAF and SPLM-N, which has aligned with the RSF, and the RSF captured Al-Nuhood in West Kordofan, where a major grain auction center is located.

Other areas of high concern

Since late 2024, conditions have improved in other areas where concern about access to food was previously high – including the rest of Greater Darfur, Khartoum, and Al-Jazirah, which have faced Emergency (IPC Phase 4) outcomes and a risk of Famine (IPC Phase 5), as well as North Kordofan and White Nile. For the first time since the war began, a significant number of displaced people have begun to return to their home areas, following the recapture of Khartoum by the SAF in March and consolidation of control in Al-Jazirah and Sennar. This stabilization in these areas has also facilitated a relative increase in domestic food supply flows. Since December, approximately 396,738 people have returned to their places of origin across Al-Jazirah, Sennar, and Khartoum states. Meanwhile, there are reports of near-normal activity along key trade routes connecting eastern Sudan through Sennar and Al-Jazirah to neighboring states. Increased access to available supply is reportedly moderating cereal prices, but this is in the context of prices that had risen 2.3-4.5 times higher than that observed prior to the conflict. Ultimately, while official data from Sudan's annual crop and food security assessment suggest an above-average cereal harvest in 2024 – with the bulk produced in southeastern breadbasket areas such as Al-Gedaref and Kassala – these figures must be viewed with caution given limitations in data collection quality due to the conflict. Furthermore, the impacts of protracted conflict on economic activity, market functionality, and household income sources are expected to severely limit much of the population's ability to purchase food through the 2025 lean season. The RSF's use of drone strikes to attack Port Sudan's airport and energy infrastructure and fuel storage facilities in White Nile State also illustrate risks to fuel availability, which is essential for mechanized crop cultivation and food distribution.

Food security outlook through September 2025

Severe to extreme acute food insecurity is expected in multiple areas of Sudan during the May to September lean season, driven by the impacts of protracted conflict on agricultural production and economic conditions and exacerbated by seasonal road closures, anticipated food price increases, and an ongoing cholera outbreak. It is highly likely that Famine (IPC Phase 5) will persist in areas of North Darfur at a minimum. Humanitarian operations will face critical challenges in reaching populations as roads deteriorate, with pre-positioning of supplies urgently needed before May-June when heavy rains typically begin. The rainfall forecast, which projects above-average rainfall, presents a potential double-edged sword: while high rainfall typically benefits agricultural activities and the availability of wild foods, it will also likely lead to flood-related crop and livestock losses, contribute to waterborne illness, and pose humanitarian and commercial access constraints. Since July 2024, there have been at least 59,000 confirmed cases of cholera, with concerns of significant underreporting due to conflict-related disruptions to health surveillance systems. There is high concern for a resurgence in cases during the rainy season, especially in IDP sites where water, sanitation, and health conditions are very poor – such as in sites receiving hundreds of thousands of repeatedly displaced people from Zamzam camp. The interaction between cholera, sustained food consumption deficits, and already-high levels of acute malnutrition would likely lead to heightened levels of mortality, including among young children, pregnant/lactating women, and the elderly.

Food insecurity is expected to peak between July and August, when food stocks at both the household level and in markets are depleted, and food prices reach their highest levels of the year. Populations in Al-Fasher, Tawila, Al-Lait, At-Taweisha, Um Kedaddah, and Melit of North Darfur will face the most extreme outcomes, especially populations isolated within and recently displaced from Zamzam and Abu Shouk IDP camps and the town of Al-Fasher. As the rainy season progresses, the northern Al-Fasher-Mellit road will likely become impassable, cutting off the last remaining supply route. Recently besieged areas in the Western Nuba Mountains of Greater Kordofan also warrant continued high concern, particularly in frontline areas contested by the SAF, SPLM-N, and RSF, where population movements and commercial flows remain restricted by tensions and active hostilities. Finally, areas with high concentrations of IDPs in Greater Darfur and returnees in the newly accessible areas of Khartoum, Al-Jazirah, and Sennar will likely also remain of concern during the lean season, given the loss of livelihoods among IDPs and returnees and erosion of income-generating opportunities. In March 2025, WFP reached 4 million people across Sudan – the highest monthly figure since the conflict began and nearly four times the number assisted at the same time last year. Nevertheless, this represents less than 1 in 5 people in need of urgent humanitarian food assistance to prevent acute hunger and malnutrition. It is essential that this momentum is maintained, ensuring food and nutrition assistance is prepositioned as urgently as possible in Darfur and other high-concern locations.

Gaza

Ceasefire collapse and ongoing blockade lead to a renewed rise in acute hunger and malnutrition

The war between Israel and Hamas led to multiple warnings of a risk of Famine (IPC Phase 5) in Gaza in 2024, culminating in a near-total blockade of humanitarian and commercial supplies to besieged areas of North Gaza governorate from October 2024 to mid-January 2025. In early 2025, the large-scale distribution of food during the January 19-March 18 ceasefire between Israel and Hamas likely averted extremely critical levels of acute malnutrition and hunger-related mortality from materializing in North Gaza governorate, while also alleviating the severity of hunger across the rest of Gaza. The reopening of the Netzarim Corridor on January 27 allowed movement between southern and northern Gaza for the first time in 15 months, with over 586,000 people returning from the south to the north and enabling humanitarian assistance to reach previously-besieged areas. An estimated 244,560-380,223 MT of food entered Gaza during this period, based on varying estimates from UN agencies and Israel's Coordination of Government Activities in the Territories (COGAT). Humanitarian actors reportedly reached over two million people with large food parcels and distributed wheat flour to over 1.28 million people.

On March 2, however, Israel shut all border crossings to Gaza and has since prevented all food and other essential goods from entering the strip. On March 18, the Israeli Defense Forces (IDF) resumed military operations against Hamas. The Gaza-wide blockade of goods has been in place for 71 days as of May 12, exceeding the Gaza-wide closure observed at the start of the war in October 2023. Civilians have been restricted to increasingly small areas across Gaza: high-intensity IDF operations are ongoing in North Gaza governorate, and the IDF has re-instated both the Jabaliya and Netzarim corridors and established a new "Morag corridor," which collectively bisect North Gaza from Gaza City, the north from the south, and Rafah from Khan Younis. Evacuation orders and buffer zones have forcibly displaced civilians from approximately 70 percent of Gaza as of April 30,[2] and formal estimates indicate nearly 429,000 people have been re-displaced since the re-escalation of hostilities as of May 6.

Food and other supplies stockpiled during the ceasefire have rapidly dwindled. On April 24, UNRWA reported it has completely run out of flour for household distributions. On April 25, WFP reported it had already distributed all remaining food parcels, run out of flour and other supplies for WFP-supported bakeries, and depleted remaining warehouse food stocks. As of early May, UN agencies and the Palestinian NGOs Network reported that only around 70-120 community kitchens still had supplies for meals – compared to 170-180 kitchens during the January-March ceasefire – whilst expressing concern these would likely shut down over the course of early-to-mid May. On May 7, the World Central Kitchen confirmed it had fully exhausted its supplies. Market retailers have faced mounting restocking challenges, driven by wholesale stock shortages, high restocking costs, insecurity, and fuel shortages, as well as a cash liquidity crisis that has impeded supplier payment for operational expenses. Food prices have risen by 150-700 percent above pre-conflict prices,

[2] According to UN analysis of Israeli orders, 100 percent of Rafah is a no-go zone or a displacement area, followed by 84 percent of North Gaza, 78 percent of Gaza, 51 percent of Khan Younis, and 41 percent of Deir al Balah.

according to WFP market monitoring. Meat, eggs, and dairy are largely unavailable, and a 25kg bag of flour reportedly costs USD 90-100, representing a 450 percent increase since the ceasefire. In addition to exorbitant prices, cash shortages and prohibitive cash-out fees (30 percent) for digital payments are impeding households' ability to buy available food.

Collecting representative survey data in Gaza remains difficult due to the ongoing conflict and volatility of displacement, which limits the ability to gather information on food consumption, acute malnutrition, and mortality from a broad cross-section of the population. As a result, FEWS NET and its partners continue to base their analysis on a combination of food security indicators from non-representative telephone surveys, acute malnutrition screenings and case admissions, and an estimation of the availability of and access to required kilocalories. The total body of evidence – including computer-assisted telephone surveys (CATI) surveys conducted in April – indicates that severe to extreme levels of hunger, which threaten lives, is present across much of Gaza. The Nutrition Cluster reported a rise in global acute malnutrition (GAM) admissions from 2,000 in February to nearly 3,700 in March, and an additional 984 children were diagnosed with malnutrition in the first two weeks of April. UN-led estimates project an increase in the total number of acutely malnourished children under five to 71,000 based on current trends, of which 14,100 are expected to be severe.

Over the coming five months, diplomatic progress toward a durable ceasefire is considered unlikely without major shifts in Israel and Hamas's willingness to negotiate on their respective objectives. The trajectory of acute food insecurity hinges on Israel's recent statements that it plans to change its current border policy to allow limited assistance into Gaza, but with a radically different approach to supply and distribution through a restricted number of tightly controlled hubs. Citing the stated aim of preventing aid diversion to Hamas, Israel's security cabinet reportedly intends for the IDF to set up humanitarian supply corridors and distribution hubs guarded by private U.S. security contractors, from which Israel seeks to have humanitarian agencies transport and distribute rations of food and household items. UN agencies and other humanitarian actors warn the plan to militarize and strictly ration the distribution of aid is "a breach of the core principles of neutral, impartial and independent aid delivery."

Details on the scale of delivery vary widely between media reports, which are based on interviews with Israeli officials and international aid workers. One estimate suggests distribution would be initially restricted to 5,000-6,000 households per hub, reaching just 82,500 people to 330,000 people[3] if three to 10 hubs were in operation. Other estimates range from a total of under 200,000 people to a total of over 1.2 million people. A single representative per household – verified through facial recognition technology – would be permitted to retrieve a 44- to 154-pound parcel of food and hygiene items by foot once every two weeks. By some accounts, distributions would be restricted to a new checkpoint-controlled "humanitarian zone" in Rafah following a large-scale, forced relocation of civilians to the area; these accounts are reinforced by Israeli leadership's statements about a new, impending offensive to consolidate territorial control and move the majority of the population. Other accounts suggest pilot distributions would begin in the south and, if deemed successful, would then expand to Deir al-Balah and the northern governorates.

The timeline for implementation remains uncertain given the current impasse between Israel and humanitarian actors over the protection challenges the plan poses to civilians. In the absence of a new hostage and ceasefire deal, Israeli statements suggest the ground offensive would begin after May 15, and the resumption of aid distributions would follow. Scenario-based analyses of the timeline in which food supplies stockpiled over the 2-month ceasefire period will fully run out vary widely; however, there is mounting anecdotal evidence of depleted food stocks and rising hunger and malnutrition, and there are reports of internal recommendations from IDF officials to the Israeli government that aid must resume to avoid a worsening catastrophe. Immediate action must be taken to halt the spread of starvation and end the current trajectory toward extremely critical levels of acute malnutrition and hunger-related mortality.

[3] 5,000-6,000 households equates to roughly 27,500-33,000 people per hub based on an average household size of 5.5 people. Recent Israeli statements suggest a target of 300,000 people per hub.

South Sudan

Growing political instability, spillover of Sudan war, and flood forecast foreshadow worsening outcomes

As of late 2024, FEWS NET projected that South Sudan would face widespread Crisis (IPC Phase 3) and Emergency (IPC Phase 4) outcomes through at least May 2025, with 7.0 to 7.99 million people (60-65 percent of the population) in need of urgent food assistance, inclusive of tens of thousands of people in Catastrophe (IPC Phase 5). Food insecurity was most acute in Upper Nile, Unity, and Jonglei states, where sporadic conflict, expansive flooding, an influx of refugees and returnees fleeing the war in Sudan, and a cholera outbreak had converged. Although FEWS NET assessed a risk of Famine (IPC Phase 5) in the Greater Upper Nile region through late 2024, this risk declined in early 2025 as floodwaters receded and improved the population's access to a relatively favorable 2024/25 harvest, as well as other food and income sources and health services.

At the onset of South Sudan's main May-August lean season, however, current conditions indicate the trajectory of acute food insecurity will likely worsen through September. Domestic and cross-border conflict dynamics have markedly deteriorated, paralyzing the political transition plans under the 2018 peace agreement and bringing a moderate-to-high likelihood of renewed large-scale conflict. Tensions between President Kiir and First Vice President Machar have escalated to armed clashes between the South Sudan People's Defense Forces (SSPDF) and the Sudan People's Liberation Movement-in-Opposition (SPLM-IO) forces in multiple locations. Fighting in Upper Nile – especially around Nasir – has displaced at least 80,000 people and severely disrupted humanitarian food and health operations along the Sobat River corridor. Meanwhile, the RSF's efforts to consolidate control of Sudan's Greater Darfur and Greater Kordofan regions threaten to exacerbate tensions in the states of Upper Nile, Unity, and Northern Bahr el Ghazal, increasing the volatility of conflict and displacement patterns. The Sudan conflict drove at least an additional 120,108 people into South Sudan between January and March, bringing the total number of new arrivals to over 1.1 million people since April 2023.

At the same time, weather forecasts suggest an above-average rainfall season in 2025 will bring a flood event similar to that of 2024, which is expected to compromise agricultural production in flood-prone areas; disrupt already-fragile trade flows and market functionality; and elevate displacement and human and livestock disease incidence. Counties in the north, east, and center – many of which are also vulnerable to conflict – will be most affected, with prior seasonal patterns pointing to a peak in flood extent at the start of the harvest in September/October. These same areas also host the highest share of refugees and returnees and have borne the brunt of the ongoing cholera outbreak, which has led to at least 29,050 confirmed cases and 502 deaths since December. The states with the highest case burdens are Unity (33 percent of reported cases), Jonglei (21 percent), and Northern Bahr el Ghazal (18 percent). In the heavily conflict-affected country of Nasir, the cholera case fatality rate is already at 4.4 percent. The interaction of cholera and hunger is anticipated to lead to sustained Critical (15-29.9 percent) or higher levels of acute malnutrition in these areas.

The population's capacity to cope with renewed conflict and weather shocks is extremely low given the long-term, repetitive impacts of conflict and flooding on South Sudan's economy and extreme poverty levels, which have reached approximately 92 percent of the population. South Sudan's economy is projected to contract by more than 30 percent in 2025, primarily due to the dramatic reduction in oil revenue from March 2024 to January 2025 following damage to a critical South Sudan-Sudan pipeline to Port Sudan. The 65 percent depreciation of the South Sudanese Pound over the past year; reductions in maize and sorghum imports due to the Sudan war and a reduced exportable surplus in Uganda; high fuel costs; and other factors have driven up the price of the minimum food basket by 190 percent over the past year (April 2024-April 2025). Household purchasing power is set to deteriorate further during the lean season based on seasonal factors, conflict, and flooding.

Strain on humanitarian funding – coupled with heightened logistical and security constraints that hinder access to hard-to-reach areas and raise the costs of delivery during the upcoming rainy season – threaten a critical lifeline for the worst conflict- and flood-affected populations. While WFP was able to deliver food assistance to 1.5 million people in South Sudan between January and March, this reflected just 20 percent of the population in need. Government actors and donors must act now to prevent the risk of starvation in flood- and conflict-prone areas, especially in north-central Unity, Upper Nile, Jonglei and counties with a high burden of returnees and refugees.

Yemen

Protracted conflict and economic turmoil continue to jeopardize access to food

Macroeconomic instability, driven by the 10-year conflict between internationally recognized government (IRG) forces and Ansar Allah (commonly known as the Houthis and associated with the Sana'a-Based Authorities [SBA]), continues to severely limit the Yemeni population's access to food. Recent airstrikes by Israel and the U.S. in response to the Houthis' targeting of ships in the Red Sea have exacerbated this crisis. Through May 2025, FEWS NET projected widespread Crisis (IPC Phase 3) and Crisis! (IPC Phase 3!) outcomes[4] in IRG-controlled areas, largely due to above-average food prices and a weak labor market that constrains household purchasing power. Meanwhile, FEWS NET expected Crisis (IPC Phase 3) and Emergency (IPC Phase 4) outcomes in SBA-controlled areas, reflecting a scarcity of household food and income sources, unaffordable food prices despite SBA price controls, and more limited deliveries of humanitarian food assistance. Countrywide, 17.0-17.99 million people (50-55 percent of the population) were expected to need food assistance to prevent food consumption gaps.

Since late 2024, multiple aspects of Yemen's conflict dynamics have worsened. Multiple Israeli airstrikes on essential port infrastructure controlled by the SBA since late 2024, followed by U.S. airstrikes on port and oil infrastructure in March and April 2025, have compromised the volume of essential fuel and food imports. Video footage and satellite imagery depict substantial damage to the Ras Isa fuel terminal. At the same time, fighting along the IRG-SBA frontlines increased moderately relative to late 2024, likely reflecting the erosion of informal ceasefire arrangements and breakdowns in Saudi-Ansar Allah backchannel diplomacy, rising political tensions, and a perceived weakening of Ansar Allah following U.S. airstrikes. Moreover, the SBA introduced a ban on wheat flour imports through the Al-Hudaydah and As-Salif ports in January to purportedly limit foreign competition and protect domestic wheat millers; however, while Yemen's milling capacity (12,250 MT per day) can theoretically process all imported wheat grains, fuel supply disruptions will likely compromise this capacity.

The macroeconomic situation has consequently deteriorated, particularly in IRG-controlled areas where the Yemeni Rial reached unprecedented depreciation levels of over YER 2,300 per USD in March 2025, marking a nearly 30 percent decline compared to March 2024. The average fuel price in IRG-controlled areas also increased by approximately 15-28 percent between March 2024 and March 2025, contributing to higher food distribution costs. These factors have driven food prices to record highs, with the minimum food basket reaching YER 169,262 in March 2025. While SBA-controlled areas maintain relatively stable prices through strict controls, household purchasing power is similar-to-worse in SBA-areas compared to IRG-areas, and access to liquidity and foreign currency reserves is increasingly constrained.

Meanwhile, below-average rainfall during the March-May 2025 first rainy season has led to very dry conditions, with most regions experiencing deficits of 40-55 percent compared to normal. This will likely reduce crop yields, accelerate soil degradation, and limit pasture regeneration. While above-average rainfall is forecast for the second rainy season in June-September, high fuel and agricultural input costs will likely continue to constrain area planted and yields.

Severe acute food insecurity outcomes are expected to persist through September, with minimal improvement associated with the first season harvest. While the U.S. has announced an Oman-brokered agreement with the SBA to cease attacks and facilitate a resumption of commercial shipping and port operations on the Red Sea, the de-escalation is likely tentative. Israeli strikes still pose a risk to the stability of fuel and food imports, and the recent designation of Ansar Allah as a foreign terrorist organization (FTO) – effective April 5, 2025 – and associated sanctions risk disruptions to remittances transfers and humanitarian operations. Overall, there are significant challenges that will affect both IRG- and SBA-capacity for food availability and affordability due to insecurity, inadequate availability of foreign currency, insufficient access to credit, and fuel shortages. Upward pressure on food prices is considered highly likely in both IRG and SBA areas. Additionally, there is a low-to-moderate likelihood that conflict conditions will drastically worsen throughout Yemen.

As a result, millions of Yemeni households are expected to sustain moderate to large food consumption gaps. Caloric

[4] The (!) denotes areas where outcomes would likely be at least one IPC Phase worse without current or planned humanitarian food assistance.

deprivation will also contribute to high levels of acute malnutrition, which is concurrently driven by poor sanitation, health infrastructure, and the spread of waterborne diseases, including cholera. As of December 2024, Yemen accounted for 25 percent of the global cholera burden and 18 percent of global cholera-related mortality. UNICEF reports that half of Yemen's under-five population is acutely malnourished, including 527,000 children with severe acute malnutrition. As of April, food assistance distributions were ongoing to 3 million people in IRG areas and 1.7 million people in SBA areas. While deliveries are comparable to late 2024 despite recent reports of the termination of WFP's key sources of funding, these recipients represent a fraction of total need. Moreover, challenges to future food aid deliveries are mounting amid WFP's concerns that the FTO designation is already complicating its payment transactions to its partners due to financial restrictions.

Ethiopia

Dry conditions, intermittent conflict, and economic challenges hinder recovery from multi-year shocks

The trajectory of acute food insecurity in Ethiopia should be understood within the context of challenges stemming from the erosion of agricultural production and market functionality in Tigray and neighboring areas during the 2020-2022 war and the slow recovery of livestock herds after the historic 2020-2023 drought in the pastoral south and southeast. As of late 2024, FEWS NET anticipated relatively lower needs from January to May 2025 compared to the same period of 2024, with 11.0-11.99 million people (5-10 percent of the population) expected to need humanitarian food assistance. A generally favorable *meher* harvest and improved livestock productivity in 2024 were set to support less severe Stressed (IPC Phase 2) and Crisis (IPC Phase 3) outcomes across most of northern, southern, and eastern Ethiopia compared to the extreme severity of acute food insecurity observed from 2020 to early 2024. However, Emergency (IPC Phase 4) outcomes were still expected in western Afar and remote areas of Tigray in the north, as well as among destitute and displaced pastoral populations in Somali and Oromia regions who have not recovered from drought-related livestock losses.

Against this backdrop, food assistance needs are expected to increase from June to September, which coincides with Ethiopia's main cropping lean season (June-August) and the southern pastoral dry season (June-September). Significant regional variations in the severity of acute food insecurity are expected, with the highest needs anticipated in the north (central and eastern Tigray; Afar; and northeastern Amhara); in *belg*-dependent areas along the Oromia-Somali border; in southern pastoral areas of Somali and Oromia regions; and among refugee populations hosted in Gambella, Benishangul-Gumuz, and Amhara regions. Gambella has received an influx of approximately 23,000 South Sudanese refugees since mid-February, resulting in the highest concentration of refugees across Ethiopia (395,470 people as of March). In addition, Ethiopia hosts an estimated 73,017 refugees who have fled the war in Sudan. In parts of Somali, Oromia, Tigray, and Afar regions, WFP reports child wasting is already within the Critical range (15-29.9 percent), with an estimated 4.4 million pregnant women and children in need of treatment for malnutrition.

The *belg* rains (February-May) have been inconsistent, with atypical dryness affecting crop development in central and northern regions and favorable cropping conditions in the southwest. Meanwhile, the *diraac/sugum* (March-May) rains in Afar largely failed through April, resulting in moderate to severe drought conditions and widespread water shortages that have halted the recovery of livestock productivity in an area where herd sizes remain well below normal. However, there are prospects for improved income from agricultural labor during the upcoming *kiremt* rains (June-September), which are forecast to be average to above-average and should support near-average cultivation for the 2025 *meher* harvest that begins in September/October. In pastoral south and east, the *gu/genna* rains (March-May) have supported crop and pasture development in the far south – the areas worst-affected by drought in 2020-2023 – more than previously forecast, but dry pasture and water conditions are observed in localized areas, especially along the northern border with Somalia.

Periodic, short-term intensifications in conflict in Amhara and Oromia, as well as political tensions and territorial disputes in Tigray's border regions, are expected to disrupt trade flows, market functionality, and migratory labor, contributing to ongoing food insecurity. In Amhara, clashes between the Ethiopian National Defense Force (ENDF) and Fano militias are expected to persist, with fighting concentrated in the Gondar, Bahir Dar, Dessie, and Debre Markos corridors and marked by periodic road closures and blockades. In Tigray, the recent intensification of political tensions due to internal leadership divisions is expected to drive unrest and opportunistic clashes, though a return to full-scale war is considered unlikely.

However, critical fuel shortages since mid-March have severely impacted essential services and humanitarian operations within the region. Meanwhile, in Oromia, asymmetric conflict between the ENDF and Oromo Liberation Army is expected to continue at recent levels in West Wollega, Kellem Wollega, West Guji, Guji, and parts of Borena zones, with blockades and market strikes expected along the Addis-Nekemte and Addis-Jimma trade corridors.

The impacts of conflict on economic activity are a particular concern given limited to poor market functionality in the north and the south and persistent – albeit improving – national macroeconomic challenges that are impeding financial access to food. The depreciation of the Ethiopian birr continues to impact the price of imported foods, especially vegetable oil, wheat, pasta, and rice. While food inflation stood at 11.9 percent in March compared to the peaks of over 30 percent in early 2024, prices remain well above average and continue to significantly affect household access to food.

The delivery of food and nutrition assistance to mitigate the scale and severity of acute food insecurity in Ethiopia is constrained by a combination of humanitarian access challenges and limited financial resources. The impact of frozen funds led to significant disruptions in food and nutrition delivery programs in early 2025, including the suspension of Joint Emergency Operation Program (JEOP) food distributions for two million people in February and substantial monthly variations in WFP-provided ration sizes.[5] More recently, JEOP confirmed stocks of ready-to-use therapeutic foods (RUTF) to treat children with severe acute malnutrition and prevent mortality are available until September, but UNICEF expects a shortfall of RUTF for its caseload after May. WFP also warns that treatment for 650,000 malnourished women and children will be halted in May, while assistance for up to one million refugees is at risk of stopping in June.

Somalia

Mixed rainfall performance, ongoing conflict and displacement, and high food prices sustain high needs

Acute food insecurity remains a high concern across Somalia, driven by frequent back-to-back weather shocks and protracted conflict that have undermined the livestock sector, reduced cereal productivity, and increased poor households' reliance on purchased food. As of late 2024, FEWS NET projected Crisis (IPC Phase 3) outcomes would become increasingly widespread across Somalia through May 2025, while Emergency (IPC Phase 4) outcomes were expected in *Bay-Bakool Low Potential Agropastoral* livelihood zone and multiple IDP settlements. Approximately 4.0-4.99 million people (20-25 percent of the population) were projected to need urgent food assistance, coinciding with the pastoral lean season in February-March and cropping lean season in March-June. This assessment was driven by expectations of a significantly below-average *deyr* harvest in January 2025 and stagnation in livestock recovery from the 2020-2023 drought, driven by La Niña-induced poor rainfall in late 2024 and early 2025.

Current conditions indicate a complex food security trajectory through September, with localized improvements expected in southern agropastoral and pastoral areas; a lag in improvement in flood-affected riverine areas until the recessional off-season harvests in August/September; and deterioration in drought-affected northern and central areas. In line with expectations, 2024 *deyr* crop production in southern Somalia was nearly 45 percent below the long-term average, while the northwest's 2024 *gu/karan* harvest concluded at over 60 percent below the 2010-2023 average. In aggregate, the FAO estimates cereal production in 2024 was 18 percent below the recent five-year average (2019-2023), a period already defined by atypically low production due to drought and floods. The performance of the April-June 2025 *gu* rains is mixed, with average to above-average precipitation in southern crop-producing areas, flash floods and riverine floods, and below-average rainfall in north-central pastoral and northwestern cropping zones.

The July *gu* harvest – which typically provides 60 percent of annual crop production – will likely be average to below-average, contingent on mid-to-late season rainfall distribution. Livestock productivity is expected to deteriorate in north-central areas during the July-September *hagaa* dry season as grazing conditions and water availability worsen. Receding floodwaters and seasonal *hagaa* showers in the south may partially benefit off-season harvests, and forecasted average

[5] In February, WFP reduced the standard ration to 65 percent of minimum caloric needs compared to the prior size of 80 percent. In March, WFP was able to provide an 80 percent ration but anticipates a return to a 65 percent ration in April. Most refugees receive a 60 percent ration, while newly arrived Sudanese refugees receive a full ration (100 percent).

karan rains will likely support short-cycle crop and fodder production in the northwest; however, these improvements are expected to be marginal given early-season losses.

Conflict also continues to significantly contribute to food insecurity. Al-Shabaab continues to control strongholds in Hiraan, Galgaduud, Lower Shabelle, and Bay, with frequent skirmishes occurring between Al-Shabaab, the Somali National Army, and clan militias in these areas as well as Gedo and Banadir; Galgaduud has seen the highest increase in conflict incidents since January. The transition from the African Union Transition Mission in Somalia (ATMIS) to the African Union Support and Stabilisation Mission in Somalia (AUSSOM) in January 2025 has created security vacuums, particularly following Ethiopian troop withdrawals from strategic areas in Jubaland and Southwest states. Al-Shabaab and aligned militia groups maintain roadblocks along major trade corridors connecting Lower and Middle Shabelle to Mogadishu, disrupting commercial activity and humanitarian access. Clan disputes and conflict over access to critical resources are also a concern, especially in the central regions of Galgaduud, Mudug, and Hiiraan. These conflict dynamics are expected to persist at similar intensity levels through September. The IOM projects a significant increase in conflict-related population displacement, in addition to weather-related displacement, with an anticipated increase in the IDP population to 4.1 million people by mid-2025.

Both local and imported cereal prices are elevated across markets, with particular concern for rising prices in the north where households rely on livestock sales to purchase food. In Burco of Togdheer Region, for example, the price of imported rice (a key staple food for pastoralists) has reached a 15-year high at 10,000 Somaliland shillings, an increase of 80 percent since February 2024. Rising staple grain prices have driven down household purchasing power – which is reflected by the amount of cereal a household can purchase from the sale of the goat – by around 35 percent over the same period. Despite some improvements in livestock prices in early 2025 due to increased demand linked to *Ramadan* and upcoming *Hajj* festivities, pastoral purchasing power is expected to decline further during the June to September dry season, as dry conditions will reduce livestock body conditions and salability.

Through September, food assistance needs are expected to be most acute in IDP settlements, central pastoral areas (Addun and Coastal Deeh), northwestern agropastoral areas, agropastoral areas of Bay and Bakool regions, and riverine areas along the Juba and Shabelle rivers. IDP settlements where acute food insecurity and acute malnutrition are of greatest concern are in Dhusamareeb, Galkacyo, Garowe, Baidoa, and Mogadishu. At the same time, humanitarian response capacity is constrained by shrinking funds. Monthly assistance distributions are expected to decline from 1.1 million recipients in January-March 2025 to fewer than 900,000 people in April-June 2025. Meanwhile, nutrition treatment and prevention services for severely (SAM) and moderately (MAM) acutely malnourished children is expected to decline amid widespread Critical (15-29.9 percent) acute malnutrition levels: while SAM treatment will most likely continue in 71 of Somalia's 74 districts, interventions to treat children with MAM will likely only be available in 42 districts.

Haiti

Unabated gang violence and extortion drive worsening hunger, especially among the displaced

Expanding levels of extreme gang violence are driving a severe food security outlook in Haiti. As of late 2024, FEWS NET projected Crisis (IPC Phase 3) outcomes would be widespread through May 2025, with Emergency (IPC Phase 4) outcomes in Cité Soleil. FEWS NET also assessed that pockets of displaced and local households in West, North-West, and Grand'Anse departments faced Emergency (IPC Phase 4); of these, IDP households in Port-au-Prince are of greatest concern amid limited evidence that suggests some households face food consumption deficits in line with Catastrophe (IPC Phase 5). An estimated 2.0-2.5 million people (20-25 percent of the population) were expected to require food assistance, with the most severe needs concentrated among IDPs who have lost their livelihood, lack shelter, and face mounting physical and financial risks accessing food due to gang-related extortion and violence.

Despite the establishment of a new transitional government in April 2024 and the deployment of the UN's Multinational Security Support (MSS) since June 2024, gang violence has remained at very high levels and expanded beyond the Port-au-Prince metropolitan area. At least 5,601 people died and 1,494 were kidnapped last year, exemplified by gang-perpetrated massacres in Pont-Sondé and Petite-Rivière in Artibonite and Wharf Jérémie in Cité Soleil in October and

December 2024. In 2025, pervasive violence and insecurity, political fragmentation, and severe economic challenges signal that de facto governance by gangs will most likely continue to spread. Gangs are consolidating control over key road corridors, especially Routes Nationale 1, 2, and 8, while deepening territorial and economic entrenchment in Artibonite. They are expected to increasingly fill power vacuums in the capital, impose taxation and extortion on businesses and along key supply route corridors, and use food and fuel to build patronage networks. Associated violence is expected to intensify population displacement, which rose rapidly from 313,900 people in December 2023 to 1.04 million people by December 2024, concentrated in Port-au-Prince, Delmas, Artibonite, and municipalities outside of Port-au-Prince within West Department. In March, the IOM reported nearly 60,000 people were newly or repeatedly displaced in a single month.

The population's access to food is heavily contingent on market functionality and access to income given a cumulative 40 percent decline in domestic cereal production from 2018 to 2024,[6] complete import dependence for wheat, and 90 percent import dependence for rice. Markets have shown resilience by shifting imports away from Port-au-Prince to Cap Haïtian, increasing rice imports from Pakistan as a substitute for the more expensive U.S. rice, and continuing the flow of informally-traded wheat products from the Dominican Republic despite trade restrictions. New warehouses near Cap Haïtian have contributed to an estimated 20 percent increase in rice stocks relative to last year, which will support availability. However, transportation routes remain heavily insecure, which limits supply and maintains upward pressure on prices. Gang networks' control and taxation of key transportation corridors will continue to impede supply flows between Port-au-Prince and southern, northern, and central regions. Inflation stood at 25.2 percent year-on-year in March 2025, with food prices driving the overall rise. Spot price reports indicate that food prices remain significantly above the five-year average, as they were in 2023 and 2024. In late 2024, the Ministry of Agriculture's national food security survey found that surveyed households spent up to 70 percent of their total household expenditure on food.

Through September, displaced populations will remain of highest concern, while the areas of highest concern include the Port-au-Prince metropolitan area, Croix-des-Bouquets, lower North-West, and Artibonite. A survey conducted by WFP[7] in Port-au-Prince in March found that 8 in 10 households were experiencing moderate or severe hunger based on the Household Hunger Scale, with severe hunger reaching 50 percent or higher among those in the Port-au-Prince, Cité de Soleil, and Carrefour municipalities. The findings follow an acute malnutrition survey conducted in September 2024 that suggested Critical or Extremely Critical levels of acute malnutrition (24.6 percent) were already present among children under five living in displacement sites.

While WFP has been able to scale-up social safety nets and school feeding programs in 2025, the reach of emergency food assistance (in-kind and cash) and treatment of malnutrition – which are vital for populations facing large to extreme food consumption gaps – is very low, with just 335,750 people receiving emergency aid in March. Transitional government and multilateral efforts to secure humanitarian access remain both critical and possible: WFP secured unprecedented access to gang-controlled areas in Croix-des-Bouquets, Cité Soleil, Lower Delmas, and La Saline in March.

Democratic Republic of the Congo (DRC)

Surge in conflict leads to deepening hunger in the conflict-affected east

The escalation in conflict in the eastern DRC between December 2024 and March 2025 is driving concerns for heightened acute food insecurity in 2025, particularly among newly and repeatedly displaced populations in North and South Kivu and Ituri. As of late 2024, FEWS NET had projected Crisis (IPC Phase 3) outcomes across conflict-affected North Kivu, South Kivu, and Ituri provinces, where the Rwandan-backed M23 insurgency and Ugandan Allied Democratic Forces (ADF) rebels are active, and Tanganyika, where sporadic clashes between separatist militias and government forces, as well as clashes between Luba and Batwa persisted. This projection stood in contrast to FEWS NET's expectations of widespread Stressed

[6] Based on FEWS NET's annual supply and market analyses during this period; the 2023 analysis is available here.

[7] According to WFP's methodology note, the Mobile Vulnerability Analysis and Mapping (mVAM) project collected these data via a computer-assisted telephone interview from 116 randomly selected households per department and 120 randomly selected households per commune in Haiti. The methodology note does not clarify if the survey sample is statistically representative; results should be interpreted with caution.

(IPC Phase 2) outcomes across the rest of DRC, largely linked to chronic and structural drivers of food insecurity. FEWS NET expected 14.0-14.99 million people (10-15 percent of the population) would need humanitarian food assistance across the country through May, with planned food assistance deliveries assessed as critical to mitigating the spread of Emergency (IPC Phase 4) outcomes among IDPs in the northeast.

The security situation in eastern DRC severely deteriorated in early 2025, with M23 rebels capturing major cities including Goma and Bukavu after prolonged sieges. While large-scale fighting has since calmed under M23's territorial consolidation and renewed peace talks between M23, Rwanda, and the DRC in March and April, the M23's offensive in the Kivus triggered massive displacement. UNHCR reported 500,000 new IDPs in January 2025 alone, pushing total displacement in North and South Kivu to over 3.8 million people by April; in early May, UNHCR had also recorded an outflow of over 133,000 refugees to Burundi and Uganda. Many IDP sites were forcibly dismantled, including 122 sites in North Kivu and 43 in South Kivu, which compelled nearly 887,000 IDPs to return to insecure areas or relocate to host communities. REACH reported large-scale returns of approximately 41,000 people and 200,000 people to Nyiragongo and Rutshuru territories, respectively. In February, many returnees (78 percent) surveyed via mobile phone by WFP[8] across North and South Kivu reported they have no access to agricultural land in their places of origin due to the destruction and occupation of their residence. Additionally, WFP found that around 65 percent of IDP households in North and South Kivu had poor food consumption, though interpreting this data point is hindered by chronically poor dietary diversity due to typically high reliance on cereals, roots, and tubers. However, over 80 percent of these same households concurrently reported losing their food stocks, sources of income, and productive assets due to displacement, and over 70 percent reported resorting to at least one emergency livelihood coping strategy (e.g., begging).

Consequently, increased conflict in the east significantly disrupted land preparation and planting during the February/March window for the first season harvest, which occurs in June/July. In addition, disruptions to market supply chains led to spiking food prices, with the median cost of the minimum expenditure basket climbing over 30 percent in Beni and Bukavu from January to February. According to both REACH and WFP's market monitoring, food prices are falling in response to calmer conditions, but WFP monitoring suggests many staples remained 20-40 percent above pre-conflict averages in March. Economic activity has been further constrained by the three-month closure of banks in rebel-controlled areas, limiting access to savings and cash liquidity. Extensive looting of businesses, markets, and humanitarian warehouses has diminished licit supplies, particularly in urban centers, and retailers reported they face significant difficulty re-stocking food due to high supplier prices, poor road conditions, and exchange rate instability. Nationally, inflation remains elevated but is forecasted to ease from 17.7 percent in 2024 to 8.9 percent in 2025.

As a result, conflict-affected and displaced populations in the east, as well as those who were displaced to Kinshasa and other urban areas, are expected to experience food consumption gaps between May and September. Compounding these challenges, recent flooding in Tanganyika Province has displaced nearly 10,000 people and destroyed crops, with cholera cases in the province six times higher than the same period last year. The neighboring provinces of Haut Lomami and Haut Katanga, as well as North Kivu to the north, also share a high burden of total cholera cases (15,785) in the first quarter of 2025. The interaction of hunger and disease in these areas will likely contribute to elevated acute malnutrition levels.

While access to perennial roots and tubers (such as cassava) and income from agricultural labor during the July/August second season planting period is expected to partially mitigate acute food insecurity, it is likely that both the scale and severity of hunger in the eastern DRC will remain elevated over the coming months. Needs will likely begin to peak in August/September at the onset of the August-December main lean season. Food assistance remains critical in order to prevent severe food consumption gaps among recently displaced IDPs; however, humanitarian access constraints include closed airports in key locations, shuttered financial institutions, and severe security risks along transportation routes for in-

[8] WFP's Mobil Vulnerability Analysis and Mapping (mVAM) project surveyed 752 IDP households in North and South Kivu via phone over a four-day period in February (February 19-22, 2025), drawing from WFP's database of IDPs that were previously registered in Goma and Bukavu. Given that the sampling methodology is non-representative, results should be interpreted with caution. However, computer assisted telephone interviews (CATI) provide indicative insights that can be used to infer changes in acute food insecurity outcomes.

kind assistance. WFP, which reported reaching 1.3 to 2.1 million people on a monthly basis during the August-December 2024 lean season, reported assisting only 330,000 people in February and 600,000 people in March.

The Sahel: Liptako-Gourma Region

Protracted conflict and blockades continue to severely restrict access to food

Conflict is the primary driver of acute food insecurity in the Sahel, where violent extremist organizations frequently attack civilian populations, restrict civilian, commercial, and humanitarian movements, and disrupt access to food and income sources. The Liptako-Gourma Region between Burkina Faso, Mali, and Niger is the epicenter of the Sahelian conflict. As of late 2024, FEWS NET projected Crisis (IPC Phase 3) outcomes through the end of the 2024/25 post-harvest period and start of the 2025 lean season across most of the Sahel's conflict-affected areas. Humanitarian access is highly constrained by insecurity and there is a high concentration of IDPs across northern and eastern Burkina Faso, the borderlands of east-central Mali (Kidal, Gao, Timbuktu, and Mopti), and the borderlands of western and eastern Niger (Tillabéry, Tahoua, and Diffa). Moreover, deterioration to Emergency (IPC Phase 4) outcomes was anticipated in areas where local agricultural production and commercial and humanitarian access are lowest, including in Soum province in Burkina Faso and Ménaka Region in Mali. Across all three countries, FEWS NET estimated 4.0-5.99 million people needed humanitarian food assistance.

The intensity of conflict is expected to continue in the remainder of 2025 at levels similar to 2024. To date, Jama'at Nusrat al-Islam wal-Muslimin (JNIM) has worked to consolidate and expand its territorial control in Burkina Faso, Mali, and Niger, frequently targeting civilian populations through blockades of entire towns, punitive raids, livestock theft, hostage-taking, and extortion. In Burkina Faso, JNIM militants have encircled urban centers and disrupted access to farming areas and trade routes, while in Mali, attacks are increasingly reported in historically stable southwestern regions. Meanwhile, Islamic State-Sahel is consolidating control around Ménaka and Ansongo in Mali and intensifying its presence in Tillabéri and Tahoua in Niger, where blockades and cross-border raids are displacing populations. While government-led counterinsurgency campaigns are expected to continue and there may be a slight decline in conflict events during the rainy season, levels of violence and civilian displacement are likely to remain high. Over 2 million people in Burkina Faso, nearly 330,000 people in Mali, and over 500,000 people in Niger are displaced.

Displaced and besieged populations have limited capacity to cope with the impacts of protracted conflict during the upcoming lean season. Despite generally favorable national harvests, conflict-affected areas have seen multiple consecutive years of below-average harvests, including in 2024. Localized deficits were also exacerbated by flooding, particularly in Niger where flooding affected over 1.5 million people. These production shortfalls have likely led to earlier-than-normal depletion of household food stocks in early 2025. Most poor and displaced households, especially in areas rendered largely or completely inaccessible by conflict, will primarily rely on purchasing and gathering wild foods during the main May-September lean season. However, they face extreme constraints in purchasing adequate amounts of food due to exorbitant staple food prices – which are primarily caused by restricted supply flows – combined with the destruction of salable livestock assets and a scarcity of income-generating opportunities. In blockaded areas, populations continue to depend on military-secured convoys for supplies, with insecurity leading to months-long delays that result in periodic food shortages. In addition, blockades and insecurity limit their freedom of movement to gather wild grains, vegetables, and game.

Based on price data collected during the harvest in late 2024, staple grain prices trended atypically high at 45-55 percent above the prior year in Burkina Faso and 20-80 percent above early-2024 prices in Mali, rising to over 100 percent higher in the worst-off areas such as Ménaka. In Niger, high prices in conflict-affected areas are also pronounced, but inflation has eased nationally over the past year, dropping from 9.1 percent in 2024 to estimates of 5.3 to 4.7 percent for 2025. High food prices are expected to further reduce purchasing power over the next five months, reflecting declines in supply during the concurrent rainy season and lean season. In addition, Mali, Niger, and Burkina Faso all face economic risks associated with their withdrawal from the Economic Community of West African States (ECOWAS). Namely, their exclusion from tariff-free regional trade will likely drive increases in illicit cross-border trade and place upward pressure on the prices of food and other goods, while their removal from the Regional Food Security Reserve – which aggregates cereal stocks to respond to food security crises – would compromise a critical safety net that all three nations have benefitted from in the past.

In the absence of substantial improvements in security and humanitarian access, the severity of acute food insecurity in conflict-affected areas will likely deepen and the population in need of emergency food assistance will likely rise until at least September. In September, average to above-average rainfall is forecast to support another favorable national 2025 harvest, but conflict and anticipated flooding will likely once again limit the degree to which hunger declines among conflict-affected populations. At the same time, humanitarian access to the populations most in need is expected to remain heavily constrained by blockades, armed hostilities, and improvised explosive devices. WFP continues to report significant operational challenges requiring either costly helicopter airlifts or cooperation with government-organized military supply convoys to reach isolated communities in Burkina Faso, though achieved recent success in negotiating land access to a besieged area in Titao in March.

Nigeria

Concurrent conflict, economic, and weather shocks lead to sustained high needs in the north

In recent years, protracted conflict, macroeconomic challenges, and atypically severe seasonal flooding have driven elevated acute food insecurity in Nigeria, with the most acute needs present in the north. In the north, conflict associated with violent extremist organization (VEO) activity has driven large-scale displacement, consistently disrupted access to farmland, markets, and income-generating activities, and interfered with market supply flows and functionality. As of late 2024, FEWS NET projected widespread Crisis (IPC Phase 3) outcomes across most of the north through May 2025, with Emergency (IPC Phase 4) outcomes in inaccessible areas of Borno State and among some households in the Northwest. Borno State has been the epicenter of the Boko Haram insurgency for over a decade, and the state was heavily affected by flood-related crop losses and cholera cases in 2024. An estimated 13.0-13.99 million people (5-10 percent of the population) were expected to need humanitarian food assistance, with the scale of need temporarily mitigated in April/May by off-season harvests before the onset of the July-September lean season. Displaced populations face the most severe food insecurity, particularly in makeshift camps with limited humanitarian access. Approximately 3.58 million people are internally displaced, of which 48 percent are located in Borno State alone.

Current conditions suggest rising food assistance needs through the approaching lean season. Conflict intensity is expected to continue at recently observed levels across northern Nigeria, characterized by intra-VEO clashes between Islamic State West Africa Province (ISWAP) and Jama'tu Ahlis Sunna Lidda'awati wal-Jihad (JAS) in the North East and ongoing banditry in the North West (exemplified by a December abduction of over 50 people in Zamfara's Maradun area). Household purchasing power also remains strained by the high cost of living. While inflation has moderated from its December 2024 peak of 34.8 percent to 24.2 percent in March 2025, this decline partially reflects the rebasing of the Consumer Price Index (CPI) to reduce the weight for food prices, rather than meaningful food price relief. The cost of food as measured by the CPI prices still rose by nearly 22 percent in March 2025 over last year, despite a slight alleviation of national average staple grain prices due to a seasonal increase in grain supplies during *Ramadan* and advent of the off-season harvests. The naira (NGN) continues to experience volatility, depreciating to 1,605.63 NGN per USD in early May 2025 based on expectations that falling global oil prices will negatively affect Nigerian revenue and foreign exchange reserves, which will in turn place upward pressure on import costs and market prices.

Following a below-average main season harvest in 2024, cultivation for the 2025 main agricultural season is now underway in southern areas and will gradually extend northward, with mixed prospects. Weather forecasts predict average to above-average rainfall in the north and below-average rainfall in the south, but a delayed onset of rain has materialized in deficits of 25-55 percent in northern areas based on rainfall monitoring from April 1 to May 5, 2025. The Nigerian Meteorological Agency warns of a shorter-than-usual rainy season in the conflict-affected North East, exacerbated by expectations of a severe dry spell across the north in June-August, which would likely reduce crop yields. High agricultural input prices and insecurity will also likely constrain cultivation, particularly in the worst-affected areas of the north where many households have limited or no access to farmland. In line with historical trends, farmer-herder conflicts are also expected to rise seasonally through September, periodically disrupting agricultural activities.

Through September 2025, food insecurity is expected to remain most severe in inaccessible areas of northeastern Borno State, particularly in Abadam, Guzamala, Marte, and Bama Local Government Areas (LGAs), where extremely limited mobility due to VEO activity will result in limited capacity to engage in agricultural production and other income-generating activities. In the Northwest, populations in areas most affected by banditry in Zamfara, Sokoto, Katsina, Kaduna, and Niger states will most likely also face widening food consumption gaps. Conversely, food assistance needs in southern areas are expected to be relatively low.

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