PAKISTAN

Climate shocks and economic challenges drive 7.5 million people into high levels of acute food insecurity in 45 districts of rural Pakistan

IPC ACUTE FOOD INSECURITY ANALYSIS
December 2025 - September 2026
Published on18 February 2026

CURRENT SITUATION: DEC 2025 - MAR 2026

7.5M

(21 percent of the population analysed)

People facing high levels of acute food insecurity (IPC Phase 3 or above)

IN NEED OF URGENT ACTION

Phase 5	0 People in Catastrophe
Phase 4	1,249,000 People in Emergency
Phase 3	6,295,000 People in Crisis
Phase 2	12,665,000 People in Stress
Phase 1	15,346,000 People in food security

PROJECTED SITUATION: APR - SEPT 2026

6.7M

(19 percent of the population analysed)

People facing high levels of acute food insecurity (IPC Phase 3 or above)

IN NEED OF URGENT ACTION

Phase 5	0 People in Catastrophe
Phase 4	570,000 People in Emergency
Phase 3	6,119,000 People in Crisis
Phase 2	12,934,000 People in Stress
Phase 1	15,932,000 People in food security

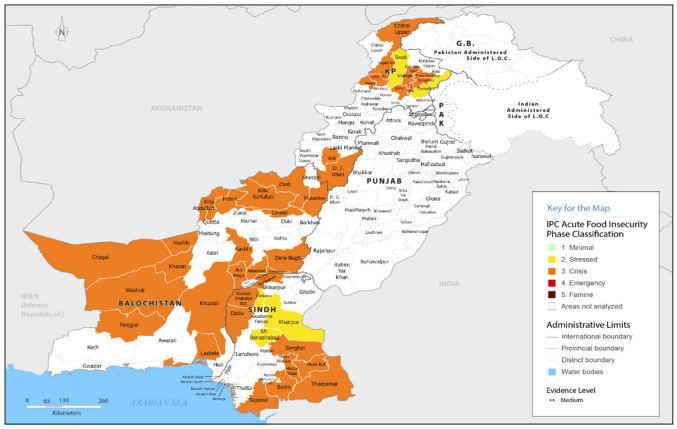
DISCLAIMER

This document is currently pending approval from the governments of Balochistan, Sindh and Khyber Pakhtunkhwa. The findings presented reflect the acute food insecurity situation in 45 rural districts within these provinces and do not represent the overall situation across Pakistan. The disclaimer will be removed once official concurrence is received from the respective provincial governments.

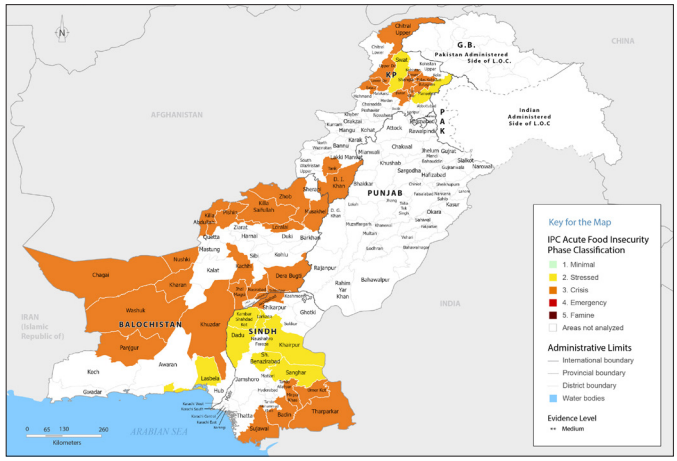
Overview

Residual impacts of the 2025 monsoon floods, prolonged drought and dry spells, and localised insecurity are driving more than one-fifth of the analysed population in Pakistan into high levels of acute food insecurity. In the current period (December 2025 - March 2026), corresponding to the lean season in most areas and the *Rabi*—or winter harvest—season in some districts, approximately 7.5 million people (21 percent of the analysed population) are classified in IPC Phase 3 or above (Crisis or worse). This includes around 1.25 million people who are experiencing critical levels of acute food insecurity, IPC Phase 4 (Emergency), which is characterised by large food gaps and high levels of acute malnutrition. For the 6.3 million people (18 percent of the analysed population) who are experiencing IPC Phase 3 (Crisis), they are unable to meet their essential food requirements and are forced to resort to unstainable coping measures. Immediate, life-saving assistance is needed to prevent a catastrophe for those in Phase 4, as well as to prevent further deterioration for those in Phase 3.

Current Acute Food Insecurity: Dec 2025 - Mar 2026



Projected Acute Food Insecurity: Apr - Sept 2026



The IPC acute food insecurity analysis in Pakistan covered 45 vulnerable rural districts that face widespread food insecurity, malnutrition, and poverty. These districts—spread across Balochistan (19), Sindh (12), and Khyber Pakhtunkhwa (14) provinces—comprise an estimated 35.6 million people, equivalent to about 23 percent of the rural population and 14 percent of the total population of Pakistan.

The lower number of people classified in IPC Phase 3 or above compared to the same season of the previous analysis (November 2024–March 2025) does not reflect an improvement in food security conditions. In proportional terms, the situation remains largely unchanged, with 21 percent of the analysed population in Phase 3 or above (including 3 percent in Phase 4) in the current round, compared to 22 percent in Phase 3 or above (including 3 percent in Phase 4) last year. The reduction in absolute numbers is primarily driven by reduced geographic coverage, as the current analysis covers 45 districts, compared to 68 districts in the previous round.

Acute food insecurity is primarily driven by the residual impacts of the 2025 monsoon floods, prolonged drought and dry spells, and localised insecurity, which have significantly weakened agricultural and pastoral livelihoods. These shocks have reduced crop and livestock production, constrained income-earning opportunities, and disrupted market access, leaving poor and vulnerable households with limited coping capacity.

In the current analysis, out of 45 rural districts, five are classified in IPC Phase 2 (Stressed) while the remaining 40 districts are classified in Phase 3. Between December 2025 and March 2026, the highest incidence of acute food insecurity is observed in Musakhel, Zhob, Kachi, Tank and Torghar districts, with 30 percent of their population classified in Phase 3 or above. Of this, 10 percent of the population in Tank is classified in Phase 4, while 5 percent in each of the remaining districts is classified in Phase 4.

During the projection period (April-September 2026), corresponding to the monsoon season and post-harvest Rabi (winter) crops, the number of people in Phase 3 or above is expected to slightly decrease to 6.7 million (19 percent of the analysed rural population), compared to 7.5 million in the current period. This represents a reduction of about 855,000 people, or approximately two percentage points. Across the 45 analysed districts, about 570,000 people (2 percent of the analysed population) are in Phase 4, while approximately 6.12 million people (17 percent of the analysed population) are in Phase 3. Compared to the same season of the previous year, when approximately 10 million people were classified in Phase 3 or above, the projected population appears lower. This should not be interpreted as an improvement in food security conditions. As with the current period, the apparent decline is largely driven by reduced geographic coverage, as the 2026 projection covers 45 districts, compared to 68 districts in the 2025 projection. When assessed proportionally, the share of the analysed population facing Crisis or worse conditions remains broadly similar, at around 19 percent in the current projection, compared to 20 percent in the previous year.

In the projection period, 36 of the 45 rural districts are projected to be classified in Phase 3 and nine in Phase 2. Acute food insecurity during the projection period will continue to be driven by monsoon rainfall and flood-related access constraints, persistently high food, fuel and input prices, localised insecurity, and uncertain cross-border trade. However, improvement in Phase 3 or above outcomes is expected due to increased wheat availability, the Eid festival, improved livelihood opportunities during the Rabi harvest and Kharif planting seasons, and livestock sales for Eid.

Acute food insecurity remains high in several analysed districts due to limited own food production and heavy reliance on markets, including in Kohistan Lower, Kolai Palas, Torghar, Shangla, Dir Upper, and Upper Chitral in Khyber Pakhtunkhwa; Tharparkar and Umerkot in Sindh; and Zhob, Musa Khel, Chaghi, Kharan, Nushki, and Washuk in Balochistan. Additionally, districts with limited livelihood opportunities and high multidimensional poverty (MPI) face high levels of acute food insecurity. In border districts adjacent to Afghanistan and Iran, where livelihoods are heavily reliant on cross-border trade, disruptions—including movement restrictions and border closures—further aggravate food insecurity.

An IPC Acute Malnutrition (AMN) analysis was ongoing at the time of drafting this report. Preliminary findings indicate that acute malnutrition remains a major concern across most of the 45 analysed districts, with poor infant and young child feeding and care practices; and limited access to health and nutrition services and programmes identified as the primary contributing factors. The IPC AMN report is expected to be released between late February and early March.

Key Drivers

Climatic shocks and seasonal constraints

During the December 2025–March 2026 lean season, agriculture-related livelihood opportunities typically decline. In several parts of Pakistan, harsh winter conditions, further constrain physical access to markets and income-generating activities, exacerbating seasonal vulnerabilities. At the same time, the residual impacts of prolonged dry spells and localised monsoon flooding between June and September 2025 have already reduced crop and livestock production, leaving many farming and pastoral households more exposed during the lean season.

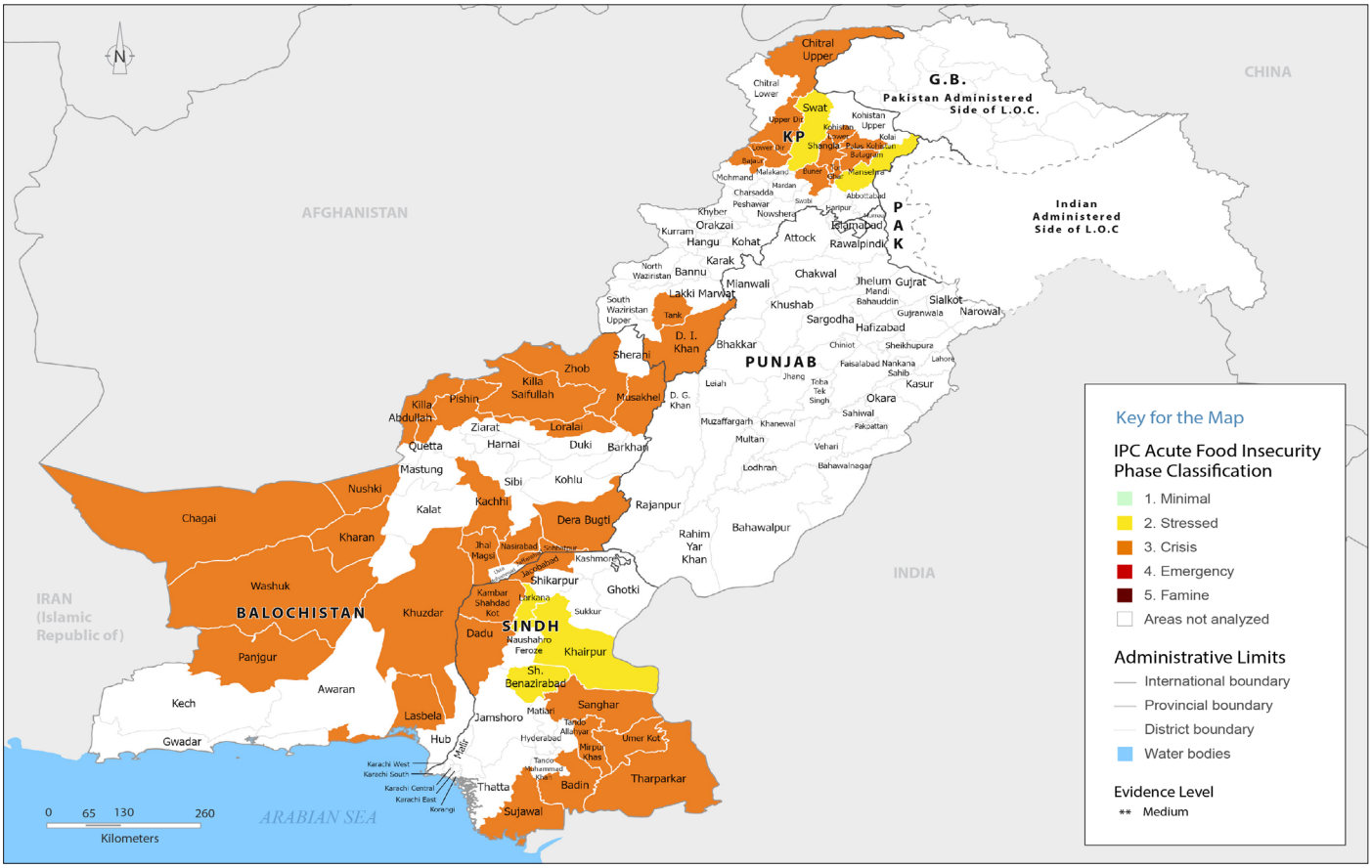
Limited income and livelihood opportunities

Economic challenges continue to drive high living costs, limited employment opportunities, and reduced household incomes, particularly among poor and vulnerable populations. Trade disruptions and international border closures in several districts from Khyber Pakhtunkhwa and Balochistan provinces have further constrained income sources in areas bordering Afghanistan and Iran.

Conflict and insecurity

Localised insecurity continues to disrupt livelihoods and markets, limit access to services, and reduce income-earning opportunities—exacerbating food insecurity.

CURRENT IPC ACUTE FOOD INSECURITY MAP AND POPULATION TABLE (DECEMBER 2025 – MARCH 2026)



Population table for the current period: December 2025 - March 2026

Division	District	Total population	Phase 1		Phase 2		Phase 3		Phase 4		Phase 5		Area Phase	Phase 3+	
			#people	%	#people	%	#people	%	#people	%	#pp	%		#people	%
Balochistan	Chagai	263,678	105,471	40	92,287	35	52,736	20	13,184	5	-	-	3	65,920	25
	Dera Bugti	259,396	77,819	30	116,728	45	51,879	20	12,970	5	-	-	3	64,849	25
	Jaffarabad	459,562	206,803	45	160,847	35	68,934	15	22,978	5	-	-	3	91,912	20
	Jhal Magsi	194,167	77,667	40	67,958	35	38,833	20	9,708	5	-	-	3	48,541	25
	Kachhi	406,238	162,495	40	121,871	30	101,560	25	20,312	5	-	-	3	121,872	30
	Kharan	210,616	84,246	40	73,716	35	42,123	20	10,531	5	-	-	3	52,654	25
	Khuzdar	674,413	269,765	40	236,045	35	134,883	20	33,721	5	-	-	3	168,604	25
	Killa Abdullah	681,639	238,574	35	272,656	40	136,328	20	34082	5	-	-	3	170,410	25
	Killa Saifullah	329,214	131,686	40	115,225	35	65,843	20	16,461	5	-	-	3	82,304	25
	Lasbela	371,400	148,560	40	148,560	40	74,280	20	0	0	-	-	3	74,280	20
	Loralai	221,215	99,547	45	66,365	30	44,243	20	11,061	5	-	-	3	55,304	25
	Musakhel	171,191	68,476	40	51,357	30	42,798	25	8,560	5	-	-	3	51,358	30
	Nasirabad	479,555	215,800	45	167,844	35	71,933	15	23,978	5	-	-	3	95,911	20
	Nushki	169,341	67,736	40	67,736	40	25,401	15	8,467	5	-	-	3	33,868	20
	Panjgur	403,065	161,226	40	141,073	35	80,613	20	20,153	5	-	-	3	100,766	25
	Pishin	590,894	265,902	45	177,268	30	118,179	20	29,545	5	-	-	3	147,724	25
	Sohbatpur	239,649	107,842	45	71,895	30	47,930	20	11,982	5	-	-	3	59,912	25
	Washuk	312,236	124,894	40	109,283	35	62,447	20	15,612	5	-	-	3	78,059	25
	Zhob	325,213	130,085	40	97,564	30	81,303	25	16,261	5	-	-	3	97,564	30
	Balochistan Total	**6,762,682**	**2,744,595**	**40**	**2,356,277**	**35**	**1,342,246**	**20**	**319,564**	**5**	**-**	**-**		**1,661,810**	**25**
Khyber Pakhtunkhwa	Bajaur	1,361,360	544,544	40	476,476	35	272,272	20	68,068	5	-	-	3	340,340	25
	Batagram	582,754	203,964	35	262,239	45	87,413	15	29,138	5	-	-	3	116,551	20
	Buner	1,061,064	424,426	40	424,426	40	159,160	15	53,053	5	-	-	3	212,213	20
	Chitral Upper	205,186	92,334	45	61,556	30	41,037	20	10,259	5	-	-	3	51,296	25
	Dera Ismail Khan	1,493,131	671,909	45	447,939	30	298,626	20	74,657	5	-	-	3	373,283	25
	Kohistan Lower	404,345	161,738	40	141,521	35	80,869	20	20,217	5	-	-	3	101,086	25
	Kolai Palas Kohistan	281,958	84,587	30	126,881	45	56,392	20	14,098	5	-	-	3	70,490	25
	Lower Dir	1,678,517	755,333	45	587,481	35	335,703	20	0	0	-	-	3	335,703	20
	Mansehra	1,723,467	775,560	45	689,387	40	172,347	10	86173	5	-	-	2	258,520	15
	Shangla	940,212	282,064	30	423,095	45	188,042	20	47,011	5	-	-	3	235,053	25
	Swat	1,991,567	896,205	45	796,627	40	298,735	15	0	0	-	-	2	298,735	15
	Tank	434,961	152,236	35	152,236	35	86,992	20	43,496	10				130,488	30
	Tor Ghar	211,251	73,938	35	73,938	35	52,813	25	10,563	5	-	-	3	63,376	30
	Upper Dir	1,083,280	433,312	40	379,148	35	216,656	20	54,164	5	-	-	3	270,820	25
	Khyber Pakhtunkhawa Total	**13,453,053**	**5,552,149**	**41**	**5,042,950**	**38**	**2,347,057**	**17**	**510,897**	**4**	**-**	**-**		**2,857,954**	**21**

Division	District	Total population	Phase 1		Phase 2		Phase 3		Phase 4		Phase 5		Area Phase	Phase 3+	
			#people	%	#people	%	#people	%	#people	%	#pp	%		#people	%
Sindh	Badin	1,553,166	543,608	35	621,266	40	310,633	20	77,658	5	-	-	3	388,291	25
	Dadu	1,352,307	608,538	45	473,307	35	202,846	15	67615	5	-	-	3	270,461	20
	Jacobabad	833,061	374,877	45	291,571	35	124,959	15	41653	5	-	-	3	166,612	20
	Khairpur	1,797,190	988,455	55	539,157	30	269,579	15	0	0	-	-	2	269,579	15
	Larkana	1,047,864	471,539	45	419,146	40	157,180	15	0	0	-	-	2	157,180	15
	Mirpur Khas	1,231,810	677,496	55	307,953	25	184,772	15	61,591	5	-	-	3	246,363	20
	Qambar Shahdadkot	1,149,007	517,053	45	402,152	35	229,801	20	0	0	-	-	3	229,801	20
	Sanghar	1,677,551	754,898	45	587,143	35	335,510	20	0	0	-	-	3	335,510	20
	Shaheed Benazir Abad	1,291,136	581,011	45	516,454	40	193,670	15	0	0	-	-	2	193,670	15
	Sujawal	770,478	385,239	50	231,143	30	115,572	15	38,524	5	-	-	3	154,096	20
	Tharparkar	1,709,280	683,712	40	598,248	35	341,856	20	85,464	5	-	-	3	427,320	25
	Umer Kot	926,048	463,024	50	277,814	30	138,907	15	46302	5	-	-	3	185,209	20
	Sindh Total	**15,338,898**	**7,049,450**	**46**	**5,265,356**	**34**	**2,605,285**	**17**	**418,808**	**3**	-	-	3	**3,024,093**	**20**
	Grand Total	**35,554,633**	**15,346,194**	**43**	**12,664,583**	**36**	**6,294,588**	**18**	**1,249,268**	**3**	-	-		**7,543,856**	**21**

Note: A population in Phase 3+ does not necessarily reflect the full population in need of urgent action. This is because some households may be in Phase 2 or even 1 but only because of receipt of assistance, and as a result they may be in need of continued action. IPC analyses produce estimates of populations by IPC Phase at area level. Marginal inconsistencies that may arise in the overall percentages of totals and grand totals are attributable to rounding.

CURRENT ACUTE FOOD INSECURITY SITUATION OVERVIEW (DECEMBER 2025 – MARCH 2026)

Between December 2025 and March 2026 (current period), approximately 7.5 million people in the rural population of Pakistan (21 percent of the rural analysed population) are classified in IPC Phase 3 or above (Crisis or worse). Across the 45 districts analysed, around 1.25 million people are experiencing critical levels of acute food insecurity, IPC Phase 4 (Emergency). This classification is characterised by large food gaps and high levels of acute malnutrition. Immediate, life-saving assistance is needed to prevent a catastrophe. A further 6.3 million people (18 percent of the analysed population) are experiencing IPC Phase 3 (Crisis). These people are unable to meet their essential food requirements and resort to unstainable coping measures. There is urgent need for food and livelihood assistance to prevent further deterioration. Around 12.7 million people (36 percent) are in IPC Phase 2 (Stressed).

This IPC analysis focuses on the rural population of 45 vulnerable districts of Sindh, Balochistan and Khyber Pakhtunkhwa—provinces in Pakistan that were affected by floods between late June and September 2025 or are vulnerable to multiple hazards. These analysed districts have diverse topography (desert, arid, irrigated, and mountainous areas). Badin, Sujawal and Lasbela are coastal districts, whereas others are either bordering with India, Afghanistan and Iran or located in the mainland.

Out of the 45 rural districts analysed, five (Mansehra, Swat, Khairpur, Larkana, and Shaheed Benazir Abad) are classified in Phase 2 and the remaining 40 districts are classified in Phase 3. Five districts (Musakhel, Zhob, Kachi, Tank and Torghar) have 30 percent of their rural population classified in Phases 3 or above, whereas 35 districts have 20-25 percent of their rural population in Phase 3 or above.

Of the 15 million people analysed in the Sindh Province, 3 milllion people (20 percent) are experiencing IPC Phase 3 or above, including 419,000 people (3 percent) in Phase 4 and 2.6 million people (17 percent) in Phase 3. Khairpur, Larkana, and Shaheed Benazirabad are classified in Phase 2, while the remaining districts are in Phase 3, reflecting lean-season pressures linked to depleted household stocks, reduced agricultural labour demand, and high reliance on markets.

In Khyber Pakhtunkhwa, out of approximately 13.5 million people analysed, around 2.8 million people (21 percent) are experiencing Phase 3 or above, including 511,000 people (4 percent) in Phase 4 and 2.3 million people (17 percent) in Phase 3. Mansehra and Swat are classified in Phase 2, while the remaining districts are classified in Phase 3, with food security outcomes driven by lean-season market dependence, constrained income diversification, and weather-related impacts on agricultural livelihoods.

In Balochistan, approximately 6.7 million people were analysed. Around 1.7 million people (25 percent) are experiencing IPC Phase 3 or above, including 320,000 people (5 percent) in Phase 4 and 1.3 million people (20 percent) in Phase 3. All analysed districts are classified in Phase 3 or above, reflecting severe lean-season impacts, limited own production, and high market reliance. While districts such as Naseerabad, Jaffarabad, Jhal Magsi, and Sohbatpur benefit from surplus production of wheat, rice, and pulses, most other districts remain structurally food-deficient and highly vulnerable to price and climate shocks.

The districts of Musakhel, Zhob, and Torghar are experiencing high levels of acute food insecurity due to limited domestic production, heavy reliance on markets, a harsh winter, and limited livelihood opportunities whereas Kachhi and Tank are primarily affected by localised insecurity.

Across Sindh, Khyber Pakhtunkhwa, and Balochistan, the lean season is exacerbating food consumption gaps, with constrained purchasing power, high staple food prices, and reduced livelihood opportunities sustaining high levels of acute food insecurity among poor and vulnerable households.

Hazards and vulnerability

Pakistan remains highly vulnerable to a wide range of natural disasters and climate-related shocks, including floods, heatwaves, droughts, winter storms, Glacial Lake Outburst Floods (GLOFs), and other extreme weather events. These hazards continue to disproportionately affect the food security situation across the analysed districts in Balochistan, Khyber Pakhtunkhwa, and Sindh. Food security and livelihood assessments highlight persistent vulnerabilities across these provinces, with around 10 percent of households reporting income losses due to floods—the highest impact being in Khyber Pakhtunkhwa (20 percent), followed by Sindh (10 percent) and Balochistan (3 percent). Drought had a more severe and widespread effect, reducing incomes for 19 percent of households overall, particularly in Balochistan (30 percent), compared to Sindh (14 percent) and Khyber Pakhtunkhwa (9 percent).

According to the Food Security Livelihoods Assessment (FSLA), drought has adversely affected livestock systems, with 19 percent of livestock-owning households reporting a decline in pasture conditions, most notably in Balochistan (24 percent), followed by Khyber Pakhtunkhwa (16 percent) and Sindh (12 percent). Drought-related constraints on livestock production were reported by 32 percent of households overall, with the highest impact observed in Balochistan (52 percent), followed by Sindh (20 percent) and Khyber Pakhtunkhwa (15 percent). In Balochistan, 40 percent of surveyed households reported significantly higher-than-usual food prices, compared to 36 percent in Sindh and 33 percent in Khyber Pakhtunkhwa. Similarly, elevated fuel and transportation costs were reported by 33 percent of households in Balochistan, 25 percent in Sindh, and 20 percent in Khyber Pakhtunkhwa, further constraining household purchasing power and access to food.

Crop marketing and sales difficulties further exacerbate vulnerability. The major selling difficulty faced by households is high transportation costs. This challenge was reported by 59 percent of households in Balochistan and Sindh, and 47 percent in Khyber Pakhtunkhwa, indicating a widespread constraint affecting market access across the provinces. In addition, low selling prices further undermine household income, affecting 60 percent of households in Balochistan, 55 percent in Khyber Pakhtunkhwa, and 62 percent in Sindh, reducing returns from agricultural production and weakening food access.

Security-related hazards remain a concern in some districts. Rising militancy and related security operations are likely to disrupt agricultural activities, markets, and transportation routes, while localized displacement may further reduce livelihood opportunities and constrain access to food in affected areas.

The evidence presented above shows food security remains highly vulnerable to climatic shocks, economic pressures, and structural constraints. Recurrent floods, droughts, and heatwaves, combined with high food and fuel prices, low selling prices, and limited livelihood opportunities, disproportionately affect households in Balochistan, Sindh, and Khyber Pakhtunkhwa. High poverty and security-related disruptions further exacerbate risks, leaving smallholders, market-dependent, and marginalized populations particularly exposed. Addressing these intersecting hazards is critical to strengthening resilience and safeguarding food access.

Availability

The food availability in 2025 reflects a combination of modest national agricultural performance and persistent sub-national constraints, particularly across Sindh, Khyber Pakhtunkhwa, and Balochistan. While the country remains largely self-sufficient in staple crops such as wheat and rice at the national level, uneven production capacity, irrigation access, infrastructure, and market connectivity continue to

Outcome Indicators

Food Consumption Score (FCS): Overall, food consumption patterns are broadly consistent across the analysed provinces. Just over half of households (around 55 percent) have acceptable food consumption, around one third (35 percent) fall into the borderline category, and approximately one in ten experience poor food consumption. While slight variations are observed, the proportion of households with poor food consumption remains largely similar across Balochistan, Khyber Pakhtunkhwa and Sindh, indicating a comparable level of severity across provinces.

Household Dietary Diversity Score (HDDS): Overall, 55 percent of households consumed five or more food groups (high dietary diversity) during the past 24-hour reference period, 33 percent consumed between three and four food groups (medium dietary diversity), while 12 percent consumed two or fewer food groups (low dietary diversity). In Balochistan, 58 percent of households have high, 33 percent have medium, and 9 percent have low dietary diversity. In Khyber Pakhtunkhwa, 53 percent of households have high, 38 percent have medium, and 10 percent have low dietary diversity. While in Sindh, 57 percent have high, 28 percent have medium, and 15 percent have low dietary diversity.

Household Hunger Scale (HHS): Overall, the vast majority of households reported no experience of hunger during the 30-day reference period. Across the analysed provinces, between 79 and 94 percent of households experienced no hunger, while only small proportions reported slight or moderate hunger. Moderate hunger ranged from 3 to 11 percent, with Sindh recording comparatively higher levels, and severe hunger remained limited overall, affecting less than 4 percent of households and being nearly absent in Khyber Pakhtunkhwa. These findings indicate that while hunger is generally not widespread, pockets of moderate and severe hunger persist, particularly in Sindh.

Reduced Coping Strategy Index (rCSI): Overall, 56 percent of households adopted low food-based coping strategies with a score of 0-3, 39 percent adopted medium strategies with a score of 4-18, whereas 5 percent adopted high strategies with a score greater than 19. In Balochistan, 58 percent of households engaged in low coping strategies, 38 percent in medium, and 4 percent in high. In Khyber Pakhtunkhwa, 57 percent adopted low, 39 percent medium, and 4 percent high coping strategies. In Sindh, 55 percent adopted low, 40 percent medium, and 5 percent high. Households with a rCSI score of 4-18 (medium) and 19+ (high) indicate that food gaps exist in these areas and households are adopting short-term coping strategies to meet their food needs.

Livelihood-based Coping Strategy (LCSI): Overall, just over half of households (55 percent) did not adopt livelihood-based coping strategies, while the remainder relied on Stressed (22 percent), Crisis (18 percent) or Emergency-level coping strategies (5 percent). Across the analysed provinces, the distribution of coping strategies is broadly similar, with around 54–56 percent of households not adopting coping strategies, 21–23 percent adopting stress-level strategies, and 16–19 percent resorting to crisis-level strategies. The use of emergency-level coping strategies remains limited, affecting approximately 4–6 percent of households, with

drive disparities in food availability across provinces. Agriculture contributes approximately 24 percent of GDP (Economic Survey of Pakistan 2024-25) and employs nearly 33 percent of the national workforce (Pakistan labour Force Survey 2024-25), yet household-level food availability remains constrained by climate shocks, market inefficiencies, and limited access to productive resources.

Seasonal monitoring by the Pakistan Meteorological Department for the months of December-February indicates above-normal temperatures and uneven rainfall, increasing localised drought risks and negatively affecting crop yields, livestock health, and water availability. Water scarcity remains a key limiting factor: overall, 36 percent of households reported limited access to or scarcity of water, with the highest prevalence in Balochistan (48 percent), followed by Sindh (31 percent) and Khyber Pakhtunkhwa (23 percent). These constraints continue to undermine crop production, pasture regeneration, and livestock productivity, particularly in arid and water-stressed districts.

According to official data from the Crop Reporting Services (CRS) of Sindh, Khyber Pakhtunkhwa, and Balochistan, trends in wheat cultivation and production in 2024-25 were mixed across provinces. In Sindh, wheat cultivation area increased by 4 percent, while production declined by 12 percent compared to 2020-21, reflecting lower yields. In Khyber Pakhtunkhwa, wheat area decreased by 4 percent, but production increased by 4 percent, mainly due to gains in yield. In Balochistan, both wheat area and production expanded, by 13 percent and 27 percent, respectively, indicating improvements in both cultivation and productivity. However, despite these improvements, Musakhel, Kohistan Lower, Kolai Palas, Torghar, Zhob, and Tharparkar remain highly food insecure due to high MPI, weak infrastructure, limited own production, heavy market reliance, constrained livelihood opportunities, and high vulnerability to climate shocks and harsh winter conditions.

Persistent production and marketing constraints continue to limit household-level food availability. Households reported plant diseases (51 percent), high fuel prices (27 percent), and limited market food availability (21 percent) as major production challenges. These are compounded by low selling prices (59 percent), debt (52 percent), and difficulties in crop sales (55 percent), reducing farm viability and incentives to expand production. Provincial disparities remain evident: constraints in market food availability were reported by 23 percent of households in Balochistan, 20 percent in Khyber Pakhtunkhwa, and 17 percent in Sindh, while crop losses due to plant diseases affected 61 percent of farming households in Balochistan, 60 percent in Sindh, and 29 percent in Khyber Pakhtunkhwa. Overall, 12 percent of households reported an increase in fertilizer prices. The impact was highest in Sindh (21 percent), where fertiliser use is more intensive and closely linked to crop productivity, followed by Khyber Pakhtunkhwa (15 percent) and Balochistan (6 percent). Rising fertiliser costs, particularly in high-input systems, are likely to constrain crop yields and limit food availability, especially for smallholder farmers with limited purchasing power.

Household food reserves remain critically low. On average, food stocks cover only 4.6 months, increasing exposure to seasonal shortages and price volatility. Although staple food items are generally available in markets, availability is insufficient or unaffordable for many households, particularly in remote and underserved districts. Overall, 20 percent of households reported constraints in market food availability, with the highest in Balochistan (23 percent), followed by Khyber Pakhtunkhwa (19 percent) and Sindh (17 percent). Staple food prices, especially wheat, remain elevated due to depleted government reserves, relatively low national production, and a widening production–consumption gap. While the Rabi harvest is expected to improve wheat stocks for producing households, non-producing and market-dependent households remain highly exposed to price fluctuations, particularly in Balochistan and Sindh.

Livestock continues to play a central role in household food availability and income, but 2025 conditions reflect increasing stress. Heat stress, feed shortages, water scarcity, and inconsistent water access have contributed to declines in milk production across Sindh, Khyber Pakhtunkhwa, and Balochistan. Overall 12.7 percent of livestock holders (17 percent in Balochistan, 6 percent in Khyber Pakhtunkhwa and 14 percent in Sindh) have reported that milk production has reduced. Overall, 32 percent of households reported constraints in accessing livestock inputs, limiting productivity and resilience. Livestock mortality linked to climatic stress and disease has increased in selected districts, particularly in Sindh and Balochistan, where water shortages are most severe. Market constraints including high transportation costs, poor infrastructure, and reduced buyer demand further undermine livestock-based food availability.

Overall, food availability in 2025 is affected less by an absolute shortage of supply and more by climate-related production risks, water scarcity, rising input and marketing costs, infrastructure constraints, and limited household reserves. While Sindh benefits from a comparatively stronger production base, Khyber Pakhtunkhwa and Balochistan continue to face more pronounced structural and climatic challenges. Recurrent climate shocks, inflationary pressures, and market inefficiencies are likely to continue placing pressure on stable food availability, particularly for smallholders, market-dependent households, and vulnerable districts.

Access

Food access is constrained by weak purchasing power, high dependence on markets, rising and volatile food prices, limited market access, and increasing household indebtedness. These factors disproportionately affect rural, food-deficit areas, particularly during the lean season, heightening the risk of acute food insecurity.

Structural weaknesses have left households highly vulnerable in rural areas where a large proportion of the population remains just above the poverty line (World Bank, 2025)[1]. Inequalities in access to resources, employment, infrastructure, and social services have contributed to high Multidimensional Poverty Index (MPI) scores in several districts. Rural deprivation is even more severe, with rural MPI[2] reaching 80 percent in Balochistan, 70 percent in Sindh, and 54 percent in Khyber Pakhtunkhwa, highlighting deep structural vulnerabilities in rural areas. These structural inequalities translate directly into acute food insecurity, with several districts already experiencing severe access constraints. Without addressing underlying disparities in income, services, and market access, these underprivileged districts are likely to remain highly vulnerable, with food access continuing to be the primary driver of food insecurity.

Pakistan's ongoing economic challenges further constrain household purchasing power, limiting access to food and disproportionately affecting lower and middle-income groups. Many districts have food-deficits, with a large share of the population dependent on market-supplied food, making them highly sensitive to price fluctuations and supply disruptions. Consequently, any economic or climatic shock can significantly increase the number of people at risk of acute food insecurity, underscoring the need for interventions that strengthen both livelihoods and food access.

The Consumer Price Index (CPI) inflation data released by the Pakistan Bureau of Statistics (PBS) for November 2025, showed that CPI inflation (General) in Pakistan increased by 6 percent on a year-on-year basis. While food inflation in urban areas increased by 5 percent and rural areas by 6 percent. Prices of key food items rose sharply over the past year: sugar (+43 percent), wheat flour (+18 percent), meat (+14 percent), cooking oil (+8 percent), milk (+3 percent), rice (-3 percent), eggs (+3 percent), potato (-28 percent), onion (-4 percent), tomatoes (-18 percent), bananas (+11 percent) and fuel for cooking and transport (gas -7 percent, fuelwood +13 percent, and high speed diesel (+10 percent). Price trends showed mixed patterns but an overall increase in November 2025 compared to the same period last year. The particular concern is the sharp rise in wheat flour prices, as most households in the analysed districts are typically out of stock during the lean season and highly dependent on markets. In contrast, declining prices of rice, potatoes, onions, and tomatoes, key crops in several districts of Sindh, Balochistan, and Khyber Pakhtunkhwa are likely to reduce farm incomes amid high production costs, increasing indebtedness and weakening household purchasing power.

Access to markets is further constrained by damaged roads, long distances, limited transport, and high costs. Travel times of one-two hours are reported by 27 percent of households in Balochistan, 17 percent in Khyber Pakhtunkhwa, and 14 percent in Sindh, resulting in higher transportation costs that further increase food prices and limit household access to markets.

Household expenditure patterns vary across provinces, reflecting differences in purchasing power and food access. Overall monthly expenditure is highest in Khyber Pakhtunkhwa (PKR 54,019), followed by Balochistan (PKR 40,095) and Sindh (PKR 37,130). Food expenditure is highest in Khyber Pakhtunkhwa (PKR 35,632) and Balochistan (PKR 34,048), compared to Sindh (PKR 24,830), where lower food spending reflects greater reliance on own production and household reserves of wheat and rice, resulting in reduced market dependence. In contrast, most analysed districts in Khyber Pakhtunkhwa and Balochistan are food-deficit, contributing to higher market reliance and elevated food expenditures.

Many households have incurred new debts to meet basic needs, 55 percent in Balochistan and Sindh, and 47 percent in Khyber Pakhtunkhwa primarily for food, medical expenses, and agricultural and livestock inputs. During the lean season, most households deplete food stocks and rely on markets, making them vulnerable to price shocks. This market dependency is particularly concerning given the economic challenges faced by many. Households in IPC Phase 3 or above are most affected, often resorting to negative coping strategies such as reducing meal frequency or portion sizes, switching to cheaper foods, or selling productive assets.

[1] https://blogs.worldbank.org/en/endpovertyinsouthasia/pakistan-s-poverty-trajectory--progress--peril--and-the-path-for

[2] https://file.pide.org.pk/pdfpideresearch/rr-multidimensional-poverty-in-pakistan.pdf

Utilisation

According to FSLA, a significant proportion of the population (83 percent) across the 45 districts have access to improved sources of water. Hand-pumps (23 percent) and tube-wells (14 percent) are the most common sources of drinking water across Balochistan, Sindh and Khyber Pakhtunkhwa. Balochistan mostly relies on tube-wells, while Sindh is on hand-pump, while diverse sources in Khyber Pakhtunkhwa province, where tap water from piped sources dominate. This reflects regional differences: groundwater via tubewells in arid Balochistan, shallow hand pumps in the Indus plains of Sindh, and more piped/spring sources in Khyber Pakhtunkhwa.

Overall, 42 percent of households have water on premises, and 16 percent have basic access within 30 minutes. However, Khyber Pakhtunkhwa and Sindh have significantly better physical access (60–48 percent on premises) compared to Balochistan (24 percent). Balochistan has the longest average time, significantly worse access, with several districts, where over 10.2 percent of households walk more than 30 minutes.

Humanitarian Food Security Assistance (HFSA)

The UN and international and national non-governmental organisation (I/NGO) partners in the Food Security and Agriculture Sector are providing HFSA to districts identified by IPC analysis to address food insecurity and livelihood challenges worsened by drought, floods and monsoon rains. However, the scale of assistance remains insufficient to meet the caloric needs of populations in Phase 3 or above. Additionally, HFSA has declined due to reduced funding. Currently, less than 25 percent of the population in each district has received aid, and challenges persist in converting assistance into kilocalories, particularly for livelihood support.

Improved sanitation, primarily flush latrines or toilets with water, is highest in Khyber Pakhtunkhwa (77 percent), followed by Balochistan (26 percent) and Sindh (23 percent). In contrast, unimproved sanitation, including open pit facilities and open defecation, is most prevalent in Sindh (25 percent) and Balochistan (26 percent) and remains very low in Khyber Pakhtunkhwa (2 percent), reflecting a comparatively better sanitation profile in Khyber Pakhtunkhwa among the selected districts. However, many of these districts are among the most vulnerable in the country, and access to sanitation and safe water can be severely disrupted during disasters such as floods, monsoon rains, and droughts, highlighting the ongoing challenges in maintaining essential services in high-risk areas.

Overall, 56 percent of the population has access to electricity in assessed districts, while the solar sources are increasingly becoming popular (24 percent) as alternate sources of energy. Khyber Pakhtunkhwa has the better electrification infrastructure among these selected districts, while Sindh faces more gaps filled partially by solar and other means.

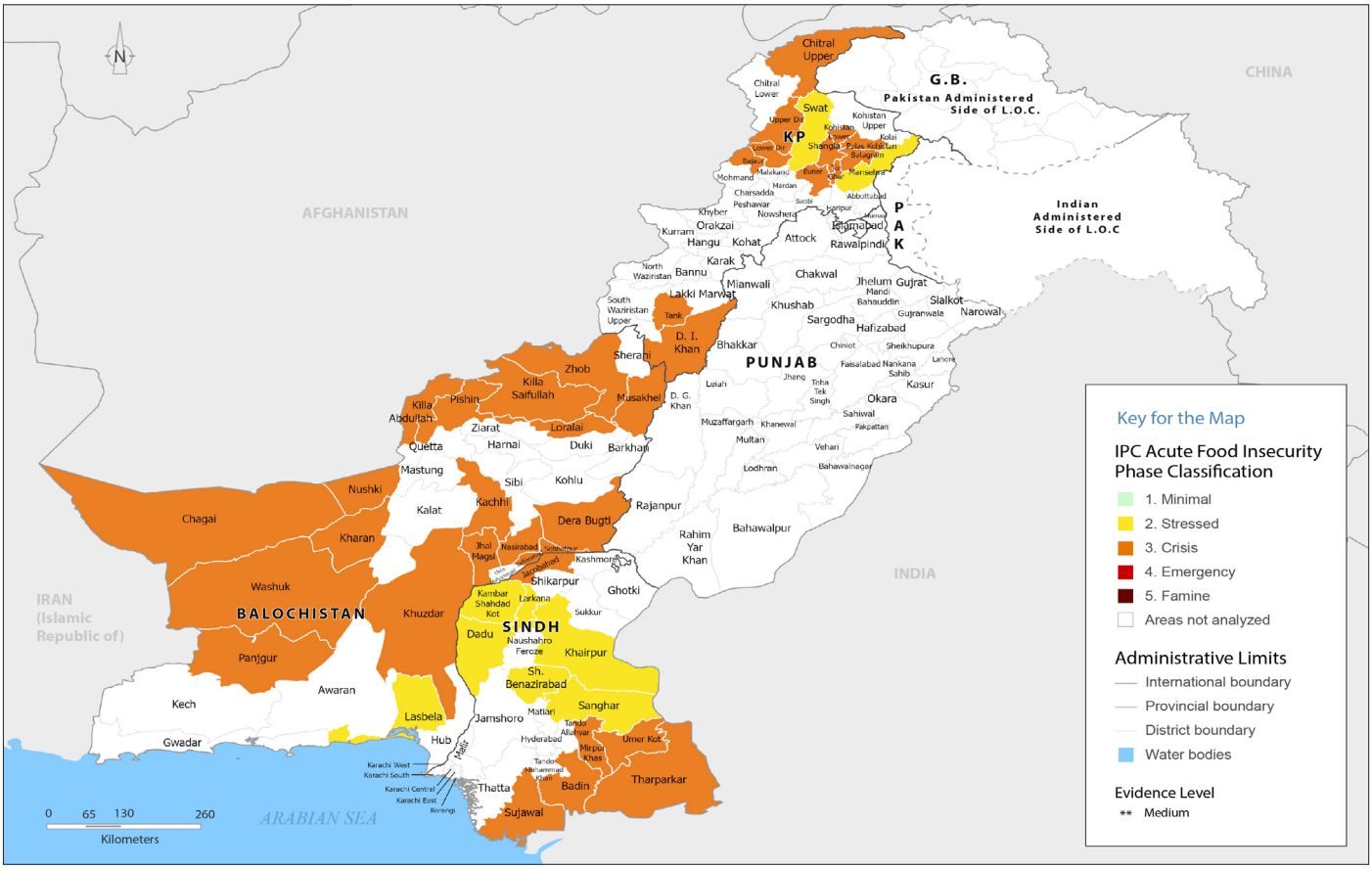
The majority of the assessed population (57 percent) reside in Kacha (typically mud/brick/unbaked construction) houses. This form dominates in Balochistan (75 percent), indicating lower housing quality/infrastructure in many districts. Khyber Pakhtunkhwa province has the highest share of Pakka houses (29 percent more durable housing), suggesting better overall housing standards among the three provinces, while Sindh shows a more balanced mix with 32 percent live in Semi-Pakka houses, and notable traditional Chhonra/thatch/wooden houses (11 percent), especially in arid/rural districts like Tharparkar (42 percent) and Umer Kot (27 percent).

In summary, for the current period, the key limiting factors affecting food security across the 45 analysed districts in Balochistan, Sindh, and Khyber Pakhtunkhwa are shaped by seasonal dynamics, market dependence, livelihood vulnerability, and recurrent climate hazards. Food availability remains structurally constrained in parts of northern and western Balochistan, where low crop productivity, limited land ownership, and shortages of livestock and agricultural inputs result in production levels insufficient to meet population needs. In contrast, several districts in Sindh and Khyber Pakhtunkhwa benefit from relatively adequate staple food production, particularly during the post-harvest period; however, these gains are temporary and tend to deteriorate as the lean season progresses and household food stocks are depleted.

Food access is a major limiting factor across all three provinces, particularly for poor and very poor households that rely heavily on markets for staple foods. Seasonal increases in market dependence, combined with high and volatile prices for wheat flour, pulses, and cooking oil, significantly constrain purchasing power. Physical access to markets is further limited by weak road infrastructure, geographic isolation, and high transportation costs, especially in remote districts of Khyber Pakhtunkhwa and Balochistan. Recurrent climate hazards, including heavy rainfall, landslides, and flash floods, periodically disrupt transport routes, agricultural activities, and market functioning, exacerbating access constraints during periods of stress.

Food utilisation challenges persist even in areas where food is available and accessible. Low education levels, poor housing conditions, income constraints, and localised gaps in access to safe drinking water and sanitation negatively affect dietary quality and effective food utilisation. While Khyber Pakhtunkhwa generally benefits from comparatively better water and sanitation coverage, persistent gender disparities and localised service gaps continue to undermine nutrition outcomes, particularly among vulnerable households.

PROJECTED IPC ACUTE FOOD INSECURITY MAP AND POPULATION TABLE (APRIL - SEPTEMBER 2026)



Population table for the current period: April - September 2026

Division	District	Total population	Phase 1		Phase 2		Phase 3		Phase 4		Phase 5		Area Phase	Phase 3+	
			#people	%	#people	%	#people	%	#people	%	#pp	%		#people	%
Balochistan	Chagai	263,678	105,471	40	92,287	35	52,736	20	13,184	5	-	-	3	65,920	25
	Dera Bugti	259,396	77,819	30	116,728	45	64,849	23	0	0	-	-	3	64,849	25
	Jaffarabad	459,562	206,803	45	160,847	35	91,912	20	0	0	-	-	3	91,912	20
	Jhal Magsi	194,167	77,667	40	77,667	40	29,125	15	9,708	5	-	-	3	38,833	20
	Kachhi	406,238	162,495	40	142,183	35	81,248	20	20,312	5	-	-	3	101,560	25
	Kharan	210,616	84,246	40	84,246	40	42,123	20	0	0	-	-	3	42,123	20
	Khuzdar	674,413	303,486	45	236,045	35	101,162	15	33721	5	-	-	3	134,883	20
	Killa Abdullah	681,639	272,656	40	238,574	35	170,410	25	0	0	-	-	3	170,410	25
	Killa Saifullah	329,214	148,146	45	98,764	30	82,304	25	0	0	-	-	3	82,304	25
	Lasbela	371,400	167,130	45	148,560	40	55,710	15	0	0	-	-	2	55,710	15
	Loralai	221,215	110,608	50	66,365	30	44,243	20	0	0	-	-	3	44,243	20
	Musakhel	171,191	68,476	40	59,917	35	34,238	20	8,560	5	-	-	3	42,798	25
	Nasirabad	479,555	215,800	45	167,844	35	71,933	15	23,978	5	-	-	3	95,911	20
	Nushki	169,341	76,203	45	59,269	35	33,868	20	0	0	-	-	3	33,868	20
	Panjgur	403,065	181,379	45	141,073	35	60,460	15	20153	5	-	-	3	80,613	20
	Pishin	590,894	265,902	45	177,268	30	147,724	25	0	0	-	-	3	147,724	25
	Sohbatpur	239,649	107,842	45	83,877	35	35,947	15	11,982	5	-	-	3	47,929	20
	Washuk	312,236	109,283	35	124,894	40	62,447	20	15612	5	-	-	3	78,059	25
	Zhob	325,213	130,085	40	113,825	35	65,043	20	16261	5	-	-	3	81,304	25
	Balochistan Total	**6,762,682**	**2,871,498**	**42**	**2,390,233**	**35**	**1,327,481**	**20**	**173,470**	**3**	**-**	**-**		**1,500,951**	**22**
Khyber Pakhtunkhwa	Bajaur	1,361,360	544,544	40	544,544	40	204,204	15	68068	5	-	-	3	272,272	20
	Batagram	582,754	233,102	40	233,102	40	116,551	20	0	0	-	-	3	116,551	20
	Buner	1,061,064	424,426	40	424,426	40	212,213	20	0	0	-	-	3	212,213	20
	Chitral Upper	205,186	92,334	45	71,815	35	41,037	20	0	0	-	-	3	41,037	20
	Dera Ismail Khan	1,493,131	671,909	45	522,596	35	223,970	15	74,657	5	-	-	3	298,627	20
	Kohistan Lower	404,345	161,738	40	141,521	35	80,869	20	20217	5	-	-	3	101,086	25
	Kolai Palas Kohistan	281,958	84,587	30	126,881	45	70,490	25	0	0	-	-	3	70,490	25
	Lower Dir	1,678,517	755,333	45	587,481	35	335,703	20	0	0	-	-	3	335,703	20
	Mansehra	1,723,467	861,734	50	689,387	40	172,347	10	0	0	-	-	2	172,347	10
	Shangla	940,212	376,085	40	376,085	40	188,042	20	0	0	-	-	3	188,042	20
	Swat	1,991,567	896,205	45	896,205	45	199,157	10	0	0	-	-	2	199,157	10
	Tank	434,961	152,236	35	173,984	40	86,992	20	21748	5			3	108,740	25
	Tor Ghar	211,251	84,500	40	63,375	30	52,813	25	10563	5	-	-	3	63,376	30
	Upper Dir	1,083,280	433,312	40	379,148	35	270,820	25	0	0	-	-	3	270,820	25
	Khyber Pakhtunkhawa Total	**13,453,053**	**5,772,044**	**43**	**5,230,549**	**39**	**2,255,207**	**17**	**195,252**	**1**	**-**	**-**		**2,450,459**	**18**

Division	District	Total population	Phase 1		Phase 2		Phase 3		Phase 4		Phase 5		Area Phase	Phase 3+	
			#people	%	#people	%	#people	%	#people	%	#pp	%		#people	%
Sindh	Badin	1,553,166	621,266	40	621,266	40	232,975	15	77,658	5	-	-	3	310,633	20
	Dadu	1,352,307	608,538	45	540,923	40	202,846	15	0	0	-	-	2	202,846	15
	Jacobabad	833,061	374,877	45	291,571	35	166,612	20	0	0	-	-	3	166,612	20
	Khairpur	1,797,190	988,455	55	539,157	30	269,579	15	0	0	-	-	2	269,579	15
	Larkana	1,047,864	523,932	50	366,752	35	157,180	15	0	0	-	-	2	157,180	15
	Mirpur Khas	1,231,810	615,905	50	369,543	30	246,362	20	0	0	-	-	3	246,362	20
	Qambar Shahdadkot	1,149,007	517,053	45	459,603	40	172,351	15	0	0	-	-	2	172,351	15
	Sanghar	1,677,551	754,898	45	671,020	40	251,633	15	0	0	-	-	2	251,633	15
	Shaheed Benazir Abad	1,291,136	581,011	45	516,454	40	193,670	15	0	0	-	-	2	193,670	15
	Sujawal	770,478	423,763	55	192,620	35	115,572	15	38,524	5	-	-	3	154,096	20
	Tharparkar	1,709,280	769,176	45	512,784	30	341,856	20	85,464	5	-	-	3	427,320	25
	Umer Kot	926,048	509,326	55	231,512	25	185,210	20	0	0	-	-	3	185,210	20
	Sindh Total	**15,338,898**	**7,288,201**	**48**	**5,313,206**	**35**	**2,535,845**	**16**	**201,646**	**1**	-	-		**2,737,491**	**18**
	Grand Total	**35,554,633**	**15,931,743**	**45**	**12,933,989**	**36**	**6,118,533**	**17**	**570,369**	**2**	-	-		**6,688,902**	**19**

Note: A population in Phase 3+ does not necessarily reflect the full population in need of urgent action. This is because some households may be in Phase 2 or even 1 but only because of receipt of assistance, and as a result they may be in need of continued action. IPC analyses produce estimates of populations by IPC Phase at area level. Marginal inconsistencies that may arise in the overall percentages of totals and grand totals are attributable to rounding.

PROJECTED SITUATION OVERVIEW (APRIL – SEPTEMBER 2026)

In the projected analysis period (April to September 2026), approximately 6.7 million people (19 percent of the rural analysed population of 35.6 million) are likely to face high levels of acute food insecurity (Phase 3 or above). This marks a decrease from the 7.5 million people classified in the current period, representing a reduction of around 855,000 people (or approximately two percentage points). Of the 19 percent of the population likely to experience high levels of acute food insecurity, 2 percent are likely to be in Phase 4, while 17 percent are likely to be in Phase 3. Across the analysed areas, the majority of the population is projected to remain in IPC Phase 1 (Minimal) and Phase 2 (Stressed), however, food consumption gaps and livelihood stress will persist for a substantial proportion of households. Among the 45 analysed districts, nine, including Lasbela, Dadu, Khairpur, Larkana, Sanghar, Qambar Shahdadkot, Shaheed Benazirabad, Swat and Mansehra, are classified in Phase 2, while the remaining 36 districts are classified in Phase 3, reflecting persistent constraints related to purchasing power, livelihood opportunities, and exposure to climatic and economic shocks

Seasonal production of wheat, other cereals, and pulses from the Rabi and Kharif seasons is expected to contribute to household food availability. Nevertheless, a large share of households are projected to remain market-dependent for food access, exposing them to elevated staple food prices. While inflation is expected to ease gradually, prices are projected to remain high due to the base effect, resulting in reduced purchasing power, particularly for smallholder farmers, agricultural laborers, casual wage workers, and households reliant on petty trade. These factors are expected to sustain food consumption gaps among vulnerable groups.

In Balochistan, out of a projected population of 6.8 million people, approximately 1.5 million people (22 percent) are expected to face Phase 3 or above, including 173,000 people (3 percent) in Phase 4. Slight improvements in food security outcomes in the populations in Phase 3 or above are projected in the districts of Chagai, Jhal Magsi, Kacchi, Kharan, Musakhel, Naseerabad, Pishin, Sohbatpur, Washuk, and Zhob due to seasonal livestock improvements and expected cash crop harvesting, which may support food availability and income. However, arid and drought-prone districts, including Chagai, Kharan, Nushki, Pishin, Panjgur, Killa Abdullah, and Washuk are expected to continue facing significant challenges, particularly in the context of below-average rainfall expectations, high transportation costs, and constrained market access. Continued high food prices and cross-border trade disruptions are likely to further limit food access for poor households.

Key Assumptions

High Household Wheat Stocks and Price Dynamics: The Rabi harvest is expected to result in relatively high household wheat stocks during the early projection period, improving food availability for wheat-producing households. Higher wheat prices are likely to benefit surplus producers; however, non-wheat-producing and market-dependent households are expected to face reduced food access. Depleted government reserves and a low 2025–26 production target are anticipated to widen the production–consumption gap, sustaining upward pressure on wheat prices throughout the projection period.

Seasonal Employment and Livelihood Opportunities: Seasonal livelihood opportunities are expected to improve temporarily due to the Rabi harvest of wheat and pulses, the sowing of Kharif crops, and increased livestock trade around Eid-ul-Azha (late May). These factors are likely to enhance short-term income and food access, particularly in rural areas, though gains are expected to be temporary.

High Food and Agricultural Input Prices: Food access is expected to remain constrained by persistently high food and agricultural input prices. Wheat prices are projected to remain elevated, while rice prices may increase due to production losses linked to the 2025 floods. High costs of fertilizer, fuel, and agricultural services are likely to reduce purchasing power among poor households, potentially leading to reduced dietary diversity and increased reliance on coping strategies.

Climatic Risks and Seasonal Shocks: Seasonal forecasts indicating slightly below-normal rainfall and a drought pre-alert may negatively affect crop yields, particularly in rain-fed areas, and constrain irrigation water availability. These climatic conditions could reduce agricultural production and labor demand, leading to localized deterioration in food availability and access.

Security Situation and Cross-Border Trade Disruptions: Potential border closures and cross-border trade disruptions may limit labor mobility and income opportunities for households reliant on informal trade, affecting market supply and price stability. In addition, increased militancy and related security operations in affected areas may disrupt agricultural activities, markets, and transport routes, potentially leading to localised displacement and worsening food security outcomes.

In Khyber Pakhtunkhwa, out of a projected population of 13.5 million people, approximately 2.5 million people (18 percent) are expected to remain in Phase 3 or above, including 195,252 people (1 percent) in Phase 4. Slight improvements in food security outcomes are anticipated in districts such as Chitral Upper, Dera Ismail Khan, Bunner, Kohistan Lower, and Lower Dir, supported by seasonal agricultural activities and non-farm income opportunities. Swat, Mansehra, and Upper Dir are expected to benefit from improved agricultural production and tourism-related livelihoods, contributing to better food

availability and access. However, districts with high market dependency and limited agricultural production, including Kolai Palas Kohistan, Tank, and Kohistan Lower, are projected to remain in Phase 3. In Kolai Palas Kohistan, food security outcomes are projected to remain unchanged compared to the previous year, with approximately 25 percent of the population continuing to face Phase 3 conditions. Additionally, poor infrastructure and constrained market access are expected to limit food security improvements in districts such as Shangla and Tor Ghar, where livelihoods are likely to remain under sustained pressure.

In Sindh, out of a projected population of 15.3 million people, an estimated 2.7 million people (18 percent) are projected to face IPC Phase 3 or above, including 200,000 people (1 percent) in Phase 4. Slight improvements in food security are projected in districts of Larkana, Dadu, Qamber Shahdad Kot, Jacobabad and Khairpur due to Kharif crop production and seasonal livelihood opportunities and agricultural labor. Improved crop production and increased fishery activities, driven by favorable natural resource availability, are expected to benefit districts like Badin, Sanghar, Mirpurkhas and Shaheed Benazirabad. However, drought-affected areas such as Sujawal, Umerkot and Tharparkar continue to face significant challenges, given that between 20 and 25 percent of their populations in Phase 3 or above, respectively. Rising food prices, water scarcity, and limited market access are anticipated to exacerbate vulnerabilities in these regions.

Across Balochistan, Khyber Pakhtunkhwa, and Sindh, modest seasonal improvements in agriculture- and livestock-based livelihoods are anticipated. However, high inflation, transportation costs, climatic variability, and drought conditions are expected to limit the extent of recovery, particularly in arid and market-dependent districts. The Eid-ul-Adha period is expected to provide temporary income opportunities for livestock-owning households through animal sales.

During the projection period, the onset of monsoon rains may result in localised riverine or flash flooding, posing risks to standing Kharif crops. Any flood-related damage could exacerbate food security outcomes in affected areas and lead to deterioration beyond currently projected levels.

COMPARISON OF PREVIOUS AFI ANALYSIS (NOVEMBER 2024 - MARCH 2025 VS. DECEMBER 2025 - MARCH 2026)

The comparison of 43 common districts across Balochistan, Khyber Pakhtunkhwa, and Sindh, covered in the last two rounds of IPC analysis, indicates a largely stable situation in acute food insecurity between November 2024 and December 2025. While some districts across all three provinces recorded improvements, localised shocks such as floods in Shangla, Battagram and Bajaur and droughts in Killa Abdullah, along with local conflicts Tank and Kachi have led to a deterioration in food security conditions, thereby offsetting gains and resulting in no major improvement in the overall population outcomes.

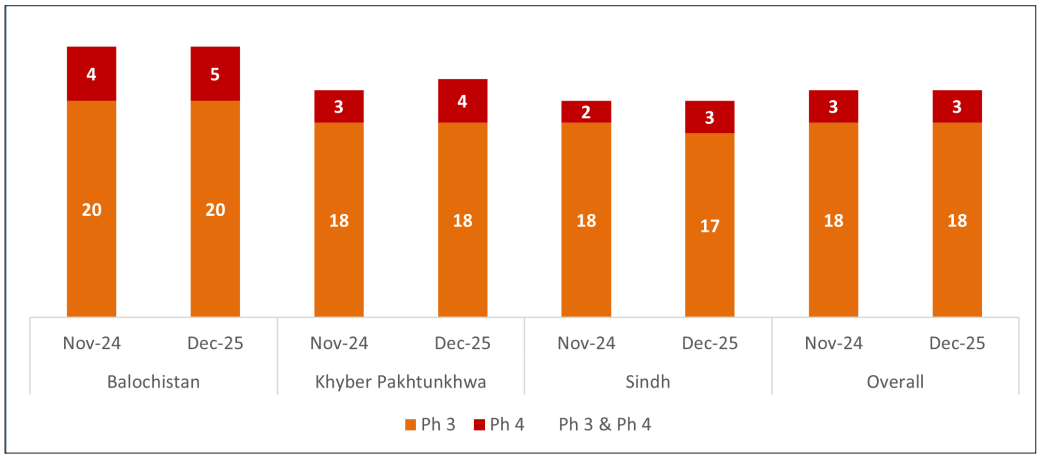
It is important to note that, while this comparison focuses on 43 districts common to both analyses, the overall geographic coverage was reduced, from 68 rural districts in the previous analysis to 45 districts in the current analysis. As such, comparisons should be interpreted in the context of reduced coverage.

At the provincial level, Balochistan continues to record the highest acute food insecurity. The share of the population in IPC Phase 3 or above increased slightly from 24 to 25 percent, with a slight increase in the population classified in Phase 4. The situation remains fragile, particularly in the context of climatic stress. According to the Drought Advisory issued on 5 December 2025, districts including Chagai, Kharan, Nushki, Pishin, Panjgur, Killa Abdullah, and Washuk were placed under the Drought Advisory (Pre-Alert) category. These districts experienced prolonged dry spells ranging from 80 to 314 consecutive dry days, which are expected to negatively affect crop production, pasture availability, and livestock health, thereby posing risks to livelihoods and food security.

In Khyber Pakhtunkhwa, the overall situation shows a slight deterioration, with the proportion of the population in Phase 3 or above increasing from 21 percent to 22 percent. This trend is partly due to flood impacts in districts such as Shangla, Battagram and Bajaur during August 2025, as well as ongoing local security-related conflicts, which have disrupted livelihoods, access to markets, and essential services in affected areas.

Sindh shows no significant improvement, with the population in Phase 3 or above remaining at 20 percent; however, the number of people in Phase 4 increased slightly. While acute food insecurity remains at concerning levels, the absence of major large-scale shocks in the analysed districts during the period has contributed to the observed stabilisation. However, persistent structural vulnerabilities including climatic stress, economic pressures, localised insecurity, and limited livelihood opportunities continue to pose significant risks and could undermine recent gains in the absence of sustained support and favorable conditions.

Prevalence of populations in Phase 3 and Phase 4 in common districts in Nov 2024 vs. Dec 2025



Recurrent climate shocks

Pakistan has experienced recurrent and compounding climate shocks over consecutive years, including the 2022 and 2025 floods, drought episodes, glacial lake outburst floods (GLOF), heavy monsoon rainfall, heatwaves, cloudbursts, and increasing seasonal variability. These shocks have caused widespread and repeated damage to agriculture and livestock, resulting in crop losses, reduced rangeland productivity, livestock mortality, and erosion of household assets. The cumulative impacts are of particular concern given the large proportion of vulnerable, agriculture- and livestock-dependent households, heightening risks to food availability, access, and livelihood sustainability.

According to the Drought Advisory issued on 5 December 2025, districts including Chagai, Gwadar, Kech, Kharan, Mastung, Nushki, Pishin, Panjgur, Killa Abdullah, Quetta, and Washuk were placed under the "Drought Advisory (Pre-Alert)" category. These districts experienced prolonged dry spells ranging from 80 to 314 consecutive dry days, which are expected to negatively affect crop production, pasture availability, and livestock health. As a result, agricultural and pastoral livelihoods are under increasing stress, exacerbating food insecurity risks. Although late December rainfall helped ease drought conditions, households continue to experience residual drought impacts, reflected in reduced Kharif crop production, degraded pasture conditions, and increased livestock diseases.

In addition, the seasonal forecast for December–February indicates below-normal rainfall and above-normal temperatures in several districts of Pakistan. This is likely to increase moisture stress during critical growth stages of wheat and other Rabi crops, potentially reducing yields, limiting food availability, and increasing reliance on markets, particularly among poor and vulnerable households.

Source: Pakistan Meteorological Department (PMD), FAO

RECOMMENDATIONS FOR ACTION

Response priorites

The analysis indicates a severe food insecurity situation in the assessed districts, driven by multiple shocks experienced during 2025-26. Considering the populations classified in Phase 3 or above in the analysed districts, the following immediate response actions are recommended to save lives and protect livelihoods.

Recommendations to improve availability

- With 21 percent of the population classified in Phase 3 or above, ensuring improved access to sufficient and nutritious food through appropriate delivery modalities is critical. This can be achieved by scaling up cash and voucher assistance alongside targeted in-kind food distributions. These interventions should aim to reduce food consumption gaps and save the lives of populations facing high levels of acute food insecurity.
- Ensure timely provision of quality seeds for high-yield crops, fodder, and vegetables, along with essential toolkits, prioritising subsistence farmers, including women. Introduce modern agricultural techniques to enhance productivity and resilience. Complement these inputs with training on climate-smart practices for crop and fodder production. Implement these interventions through conditional food or cash assistance programs, prioritising households experiencing worsening socio-economic conditions to strengthen coping capacities and promote long-term livelihoods.
- Scale up livestock protection and management measures such as vaccination and deworming campaigns to prevent disease outbreaks and safeguard livelihoods. Strengthen programs on risk reduction, preparedness, and climate adaptation to mitigate the impacts of floods, droughts, and other hazards. Support improved market access to livestock markets to facilitate trade between livestock traders and consumers.

Recommendations to address access issues

- Strengthen market access to help small-scale farmers boost earnings and diversify business opportunities. Promote the use of digital platforms and mobile applications for real-time price information, e-commerce, and direct-to-consumer sales. Provide training on quality standards, packaging, and value addition to enable farmers to tap into higher-value markets and improve competitiveness.
- Scale up disaster resilience initiatives. Protect and restore livelihoods for families affected by natural disasters (floods, droughts, and heatwaves), price shocks, conflicts, and border closures by initiating income-generating and employment-creation interventions. Promote livelihood diversification within the most vulnerable areas through skills development programs aligned with market demand to create sustainable income opportunities.
- Scale up vocational training in various trades within the most vulnerable areas, prioritising households and women facing acute food insecurity, high poverty levels, and worsening socio-economic conditions.
- To improve financial access for vulnerable households, small businesses, and those affected by border closures by providing affordable low-interest microcredit schemes to diversify livelihoods and enhance economic resilience. Prioritise smallholder farmers, women-led low-income households, and families impacted by trade disruptions due to various shocks.

Recommendations to address stabilisation/utilisation issues

- Strengthen asset creation initiatives to mitigate climate-related hazards that threaten food security for populations in IPC Phase 2 or above. To reduce vulnerability and strengthen resilience, scale up disaster preparedness measures in districts prone to recurring climate shocks to reduce impact of future shocks.
- Construct and rehabilitate water infrastructure such as tube wells, irrigation channels, and reservoirs to enhance water conservation. Develop resilient water systems to mitigate the impacts of recurring floods and droughts, ensuring sustainable access to water for farming communities.

Use IPC data/analysis findings

- Use findings from the IPC data/analysis to inform targeting and prioritisation, including government-led social safety net programmes.

Situation monitoring and update

The food security situation in the analysed areas needs to be monitored regularly due to the high levels of acute food insecurity, in addition to the high incidences of poverty and vulnerability of households.

- The macroeconomic trends in Pakistan remain a concern though showing signs of stabilisation. With the November 2025 annual headline inflation rate at 6.2 percent and annual food inflation at 5.5 percent, the prices of essential commodities, including staple food items continue to remain elevated, exerting pressure on household purchasing power, particularly the most vulnerable households.
- Additionally, multiple factors such as conflict, disease outbreaks, price shocks, limited livelihood opportunities, border closures, poverty, insecurity, displacement, challenges in agriculture and livestock, and natural disasters have contributed to food insecurity and require close monitoring. Several districts are currently under drought watch and must be carefully observed. If conditions in these areas deteriorate, the projection period analysis may need to be revised accordingly to reflect emerging changes.
- It is recommended to conduct regular or seasonal household food security and livelihood assessments, along with IPC AFI analyses, to closely monitor conditions in these and other vulnerable districts. These assessments will provide timely evidence to inform policymakers and guide interventions aimed at addressing food insecurity in high-risk areas.
- The IPC analysis guides on district vulnerability ranking and provides population numbers in crisis and emergency in current period as well as short term projections and can serve as an important tool for advocacy to prioritize right areas and population for response activities. It is recommended to use the IPC analysis findings for informing geographic targeting and prioritisation of government led social safety programme (BISP).

Risk factors to monitor

- **Prices of essential food items:** Price shocks driven by inflation, external market trends, and local supply chain disruptions pose a significant risk to household food security by reducing purchasing power. Climatic shocks such as heatwaves, droughts, and floods lower yield and quality of local agricultural and livestock production, resulting in shortages of essential food commodities in markets. This increases reliance on external markets exposing households to higher prices for food and agricultural products sourced from other provinces or imports.
- **Climatic conditions:** Rising temperatures, recurrent droughts, erratic rainfall, and floods require regular monitoring due to their adverse impacts on agriculture, livelihoods, and food security. Drought degrades rangelands, reduces crop yields and water availability for livestock, while shifting rain patterns and extreme rainfall damages orchards and water-intensive crops at critical growth stages, lowering yield, quality and production. Districts under drought alert need to be particularly monitored.
- **Conflict and security constraints:** Conflict and insecurity are major limiting factors in affected areas, driving food insecurity. Ongoing conflicts and border restrictions disrupt local movement, livelihoods, market access, trade, and labour migration. These disruptions reduce humanitarian assistance and essential service delivery, erode household income, and severely restrict food access. Continuous monitoring of these dynamics is essential.
- **Diseases:** Frequent pest outbreaks, plant and livestock diseases due to drought or adverse climate reduce production and income. Post-monsoon floods increase the risk of livestock and water-borne diseases due to stagnant water and reliance on unimproved sources. Combined with high malnutrition prevalence, these outbreaks may worsen nutrition outcomes and morbidity, further constraining food utilisation.
- **Limited access to market:** Limited access to markets puts additional burden on households reducing their limited financial resources to purchase essential daily needs items including food. Damaged roads in flood affected areas, long distances, insecurity, and high transport costs restrict access to food, sourcing of market supplies and services.
- **Livelihood loss and limited employment opportunities:** Heavy reliance on seasonal agriculture livelihoods, livestock sales, cross border trade and daily wage labour makes households highly vulnerable to climate and economic shocks. Lean seasons, conflict, security situation, exchange rate depreciation, high energy and fuel prices, costs of production and market disruptions reduce employment opportunities and household incomes likely to reduce food security.
- **Low agricultural productivity and input constraints:** Limited access to inputs such as quality seeds and fertilisers due to high prices, pest attacks, plant and livestock diseases, dependence on rainfed agriculture, declining groundwater, poor irrigation infrastructure, land degradation and extreme weather conditions constrain crop yields and food self-sufficiency which need to be monitored.

PROCESS AND METHODOLOGY

The IPC Acute Food Insecurity analysis was conducted over two time periods. The current period of analysis is December 2025 – March 2026 which was mainly based on data of household level Food Security and Livelihood Assessment (FSLA) conducted in September - November 2025[3], along with other secondary information sources. The projected period of analysis is April-September 2026, which was based on forward-looking assumptions on rainfall, food prices, food production, livestock diseases and livelihood opportunities and evolution of the Outcome Indicator trends. The analysis covered 45 vulnerable districts of Sindh, Balochistan and Khyber Pakhtunkhwa provinces, of which nine were calamity (flood) notified by the Relief Department of Khyber Pakhtunkhwa after the devastating monsoon rains/flooding in August 2025.

A joint training and analysis workshop was held between 8 and 17 December 2025 in Karachi, Pakistan. The workshop was attended by officials/staff of federal and provincial government ministries/departments, UN organisations, international and national NGOs. This analysis has been conducted in close collaboration with IPC stakeholders at national and provincial levels, including the Ministry of National Food Security and Research (MNFS&R), Pakistan Agricultural Research Council (PARC), Ministry of Planning, Development and Special Initiatives (MoPD&SI), National Disaster Management Authority (NDMA), Pakistan Meteorological Department (PMD), Provincial Bureaus of Statistics of Sindh, Balochistan and Khyber Pakhtunkhwa; Provincial Disaster Management Authorities (PDMAs) of Balochistan and Khyber Pakhtunkhwa; Agriculture and Livestock Departments of Sindh, Balochistan and Khyber Pakhtunkhwa, UN Organisations (FAO, WFP, UNICEF, UNWOMEN), International and national NGOs (including: Concern Worldwide, Welthungerhilfe (WHH), Islamic Relief (IR), Secours Islamique France (SIF), Health and Nutrition Development Society (HANDS), Rural Support Programme Network (RSPN), Youth Organization HOPE, DANESH, and NIDA Pakistan. The active participation and support of officials/staff from the above ministries/departments/organisations is highly acknowledged.

The data used in the analysis was organised according to the IPC analytical framework and includes data on food security contributing factors and outcome indicators. The data was collected from multiple sources listed below and the analysis was conducted in ISS.

Sources

Data sources used for this analysis included:

- Food Security and Livelihood Assessment (FSLA) conducted by FAO in 45 districts. The assessment provided information on a wide range of indicators: both outcome and contributing factors. The outcome indicators included in the analysis are Food Consumption Score (FCS), Household Dietary Diversity Score (HDDS), Household Hunger Scale (HHS), Reduced Coping Strategy index (rCSI), Livelihood Coping Strategies (LCS) and Prevalence of Moderate and Severe Food Insecurity based on Food Insecurity Experience Scale (FIES).
- Crop production data from the Crop Reporting Services (CRS), Agriculture Departments of Balochistan, Sindh and Khyber Pakhtunkhwa.
- Food prices data from Pakistan Bureau of Statistics (PBS).
- Population Census 2023 by Provincial Bureaus of Statistics, Balochistan, Sindh and Khyber Pakhtunkhwa.
- Food and cash assistance, agriculture support, livelihood support/other distribution from WFP, FAO, INGOs and NGOs.
- Precipitation/rainfall/flood sitreps and Seasonal Agro-Climate Outlook from PMD.
- Child malnutrition, multi-dimensional poverty data from Provincial Bureaus of Statistics, Balochistan, Sindh and Khyber Pakhtunkhwa.
- **The Evidence Level of this analysis is Medium** as per the IPC protocol.**

[3] *Household level survey known as Food Security and Livelihood Assessment (FSLA) was conducted by FAO in collaboration with Provincial Disaster Management Authorities (PDMAs) of Sindh, Balochistan and Khyber Pakhtunkhwa, WFP, UNICEF, Welthungerhilfe (WHH), Islamic Relief, IRC and CESVI, in 45 flood affected/vulnerable districts of Sindh, Balochistan and Khyber Pakhtunkhwa in October-December, 2025.*

Limitations of the analysis

Limitations of the analysis and recommendation for future analyses

- Adequate HFSA data was not available to fulfill the criteria.
- The household assessment and the IPC analysis have covered only rural areas and population of 45 districts. As such, the results should not be extrapolated or generalized as representative of the whole population in the area or province or Pakistan, but only of rural households of the IPC focused districts.

Acknowledgments

The IPC training was facilitated by Feroz Ahmed (IPC Regional Coordinator for Asia and Near East) and co-facilitated by Umer Afzal (FAO), Aman ur Rehman (WFP), Dr. Syed Irshad Shah (FAO), Akbar Khan (Bureau of Statistics, Khyber Pakhtunkhwa), Dr. Nisar Ul Haq (Livestock Department Khyber Pakhtunkhwa), Kazim Jafri (Bureau of Statistics, Sindh), Dr. Sundus (Livestock Department, Sindh), Habib Wardag and Dr. Muhammad Iqbal (Livestock Department, Balochistan).

The IPC analysis was facilitated by Feroz Ahmed and co-facilitated by Umer Afzal, Dr. Syed Irshad Shah (FAO), Aman ur Rehman Khan (WFP), Shafqat Ullah (Concern Worldwide), Akbar Khan, Dr. Muhammad Qasim (PARC), Dr. Nisar ul Haq, Abid Shahzad (NDMA), Kamran Ahmed (Bureau of Statistics, Sindh), Dr. Sundus (Livestock Department, Sindh), Omer Bangash (WHH), Habib Wardag (BEAM), Kazmi Jaffri (Bureau of Statistics, Sindh) and Muhammad Iqbal (Livestock Department Balochistan). The support of Feroz Ahmed, for data quality review, review of analysis in ISS and guidance during the training and analysis workshop; support of Aman ur Rehman Khan for providing food prices data for the analysis, support of Aqsa Noor Shaikh and Hina Kanwal for uploading the data in ISS, creating user IDs of workshop participants and ensuring access to ISS and support of Nauman ul Haq (FAO) for preparation of IPC maps is highly appreciated. The critical support of Umer Afzal, Aman Ur Rehman Khan, Dr. Syed Irshad Shah, Hina Kanwal and Aqsa Noor Shaikh for organizing and coordinating the IPC training & analysis workshop and preparing this communication brief with inputs of IPC focal points from WFP, UNWOMEN, RSPN, UNICEF, Concern Worldwide, WHH, MNFS&R, PARC and Livestock Department (Balochistan) is highly acknowledged. The valuable support of Provincial Disaster Management Authority (PDMA) of Sindh, Balochistan and Khyber Pakhtunkhwa for providing coordination support for FSLA is also highly acknowledged.

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What is the IPC and IPC Acute Food Insecurity?

The IPC is a set of tools and procedures to classify the severity and characteristics of acute food and nutrition crises as well as chronic food insecurity based on international standards. The IPC consists of four mutually reinforcing functions, each with a set of specific protocols (tools and procedures). The core IPC parameters include consensus building, convergence of evidence, accountability, transparency and comparability. The IPC analysis aims at informing emergency response as well as medium and long-term food security policy and programming.

For the IPC, Acute Food Insecurity is defined as any manifestation of food insecurity found in a specified area at a specific point in time of a severity that threatens lives or livelihoods, or both, regardless of the causes, context or duration. It is highly susceptible to change and can occur and manifest in a population within a short amount of time, as a result of sudden changes or shocks that negatively impact on the determinants of food insecurity.

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Classification of food insecurity and malnutrition was conducted using the IPC protocols, which are developed and implemented worldwide by the IPC Global Partnership - Action Against Hunger, CARE, CILSS, Catholic Relief Services (CRS), EC-JRC, FAO, FEWS NET, Global Food Security Cluster, Global Nutrition Cluster, IFPRI, IGAD, IMPACT Initiatives, Oxfam, SICA, SADC, Save the Children, UNDP, UNICEF, WFP, WHO and the World Bank.

IPC Analysis Partners:

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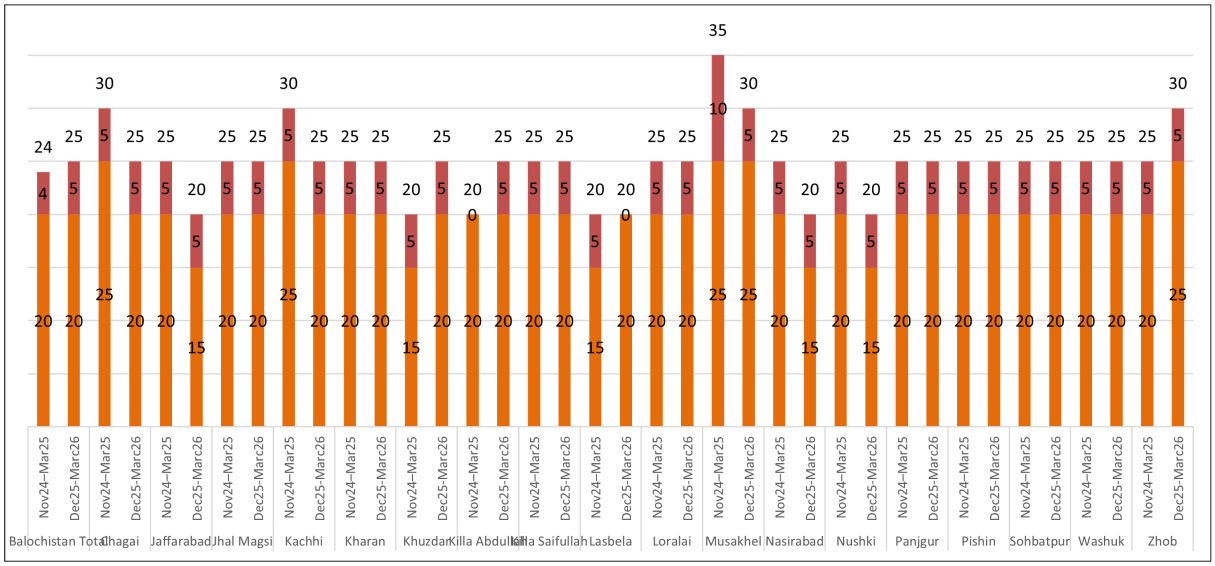
ANNEX 1

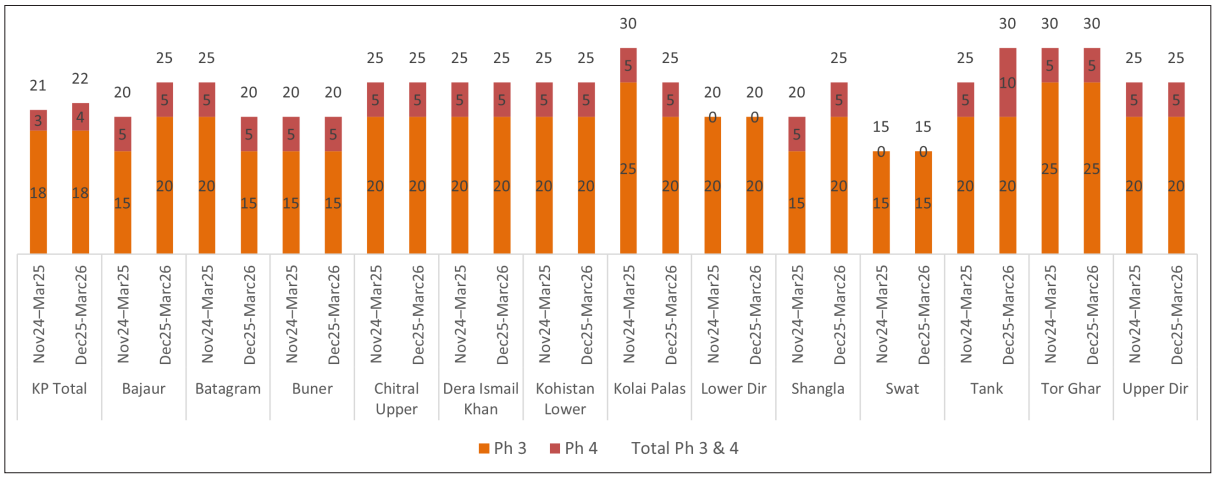
Balochistan common districts comparison graph (as % of population in IPC Phase 3 and 4)

Current IPC AFI analyses (Nov 2024 - Mar 2025) and (Dec 2025 - Mar 2026) (as % of population)



Kyber Pakhtunkhwa common districts comparison graph (as % of population in IPC Phase 3 and 4)

Current IPC AFI analyses (Nov 2024 - Mar 2025) and (Dec 2025 - Mar 2026) (as % of population)



Sindh common districts comparison graph (as % of population in IPC Phase 3 and 4)

Current IPC AFI analyses (Nov 2024 - Mar 2025) and (Dec 2025 - Mar 2026) (as % of population)