Rising concerns over atypical winterization needs amid energy shortages

Key Messages

- In June, the **Russian advance in Kharkiv largely halted**, with a notable decrease in clashes and civilian impact compared to the previous month. However, the number of clashes remains above the pre-May 10 average, when the new offensive began. In Donetsk, the frontlines saw only marginal gains by Russian forces. In Kherson and Zaporizhia, the frontlines remain largely unchanged, but the number of clashes doubled over the last month. In June, **at least 146 civilians were killed and 672 injured** across Ukraine, mostly because of missile strikes, marking the second-highest casualty figure in 2024, only surpassed in May. Strikes on medical, educational, and energy infrastructure in government-controlled areas continue, with notable strikes on energy infrastructure occurring on **June 1** and **June 20**, disrupting access to energy, water, and key services.

- Due to Russian strikes on key energy infrastructure, Ukraine has experienced a significant decline in generating capacity. Since the war began, **generating capacity has decreased by more than 50 percent**; between March and May 2024, thermal generation capacity dropped by an additional 85 percent. Russian forces have continued to **target multiple thermal and hydro plants and gas storage facilities** in Dnipro, Ivano-Frankivsk, Poltava, Vinnytsia, Zaporizhia, and Lviv. In response, Ukraine nearly doubled electricity imports between May and June, primarily from Hungary, Poland, Romania, and Slovakia. The **current energy deficit is estimated at 18-22 percent for the summer**, with potential winter deficits ranging from 25-35 percent, depending on factors such as temperature, continued strikes, and consumption patterns. Rolling blackouts are expected to continue indefinitely, and increased energy prices are likely to put upward pressure on prices of locally processed food items. Households reportedly continue to adjust to blackouts by charging their devices and storing water while power is available and depending on power banks, stored solid fuel, and water reserves during outages.

- A **winterization assessment conducted by REACH** has identified Kharkiv, Bohodukhiv, Chuhuiv (Kharkiv Oblast), and Sumskyi (Sumska Oblast) as the areas with the highest winter-related risks. This is due to typically more severe winter conditions, high populations of individuals most vulnerable to the impacts of the conflict (including internally displaced persons and older people), and conflict-related damage to already poorly insulated housing structures. Generally, the areas of highest risk are in northern Ukraine, in the regions bordering Russia and southeastern Belarus. **Winterization recommendations** from the Ukraine Shelter Cluster focus on targeting displaced families, non-displaced individuals living in substandard and war-damaged houses, returnee families, disabled persons, older persons, single-headed households, and those with chronic medical conditions. As of the writing of this report in late June, no information on June humanitarian assistance distributions was available. However, similar levels of assistance were likely delivered as in the past several months, and double distributions were planned and likely delivered in Donetsk. As in previous months, most assistance was likely provided in the frontline regions of Kharkiv, Donetsk, Zaporizhia, Dnipro, Kherson, and Mykolaiv.

- In June, crops are finishing their maturation as the **harvest of spring and winter cereal crops** across Ukraine is one month away. The April-June period in Ukraine saw near-average cumulative precipitation across most of the country despite historically dry conditions in May. Average soil moisture levels have generally been favorable for crop production, with satisfactory conditions reported for spring barley, corn, and soybeans in most areas **except in the southeast**. This region faces significant rainfall deficits, leading to below-average soil moisture and poorer crop conditions. The dry conditions in the southeast are not expected to improve, and **GEOGLAM has issued a watch** for wheat, maize, and soybeans in this region. Despite these challenges, Ukraine is projected to remain a leading exporter of agricultural products, with **forecasts** indicating a total export volume of over 60 million tons of grains, oilseeds, and related processed products in the 2024/25 marketing year. This past month, **over 5 million tons of grains and oilseeds were exported** largely through ports, similar to observed levels during previous months, near pre-war levels, and significantly higher than in previous conflict years.

Recommended citation: FEWS NET. Ukraine Key Message Update June 2024: Rising concerns over atypical winterization needs amid energy shortages, 2024.

* FEWS NET's classifications are IPC-compatible. IPC-compatible analysis follows key IPC protocols but does not necessarily reflect the consensus of national food security partners. As of IPC 3.0, the IPC no longer assesses the impact of food assistance on classification and thus no longer maps the (!). However, FEWS NET continues to produce food security maps inclusive of the (!) as well as maps compatible with IPC 3.0/3.1, which include the mapping of food security assistance bags. FEWS NET and the IPC use different methods to estimate the total Population in Need of humanitarian food assistance and assess the risk of Famine. Learn more at **www.fews.net/about**.

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