



Gaza Strip Targeted Analysis Update

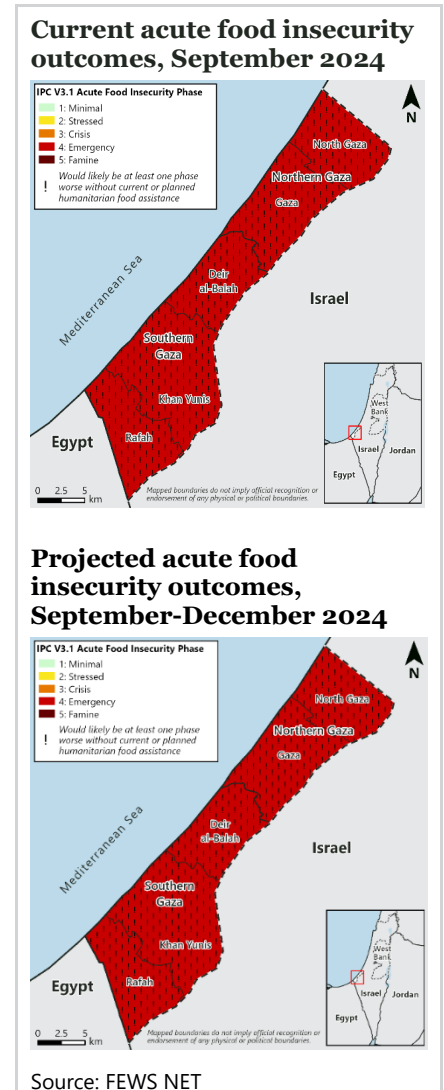
September 2024

This is an update to [FEWS NET's August Targeted Analysis](#) of acute food insecurity in Gaza, the latest report in a series of [IPC-compatible targeted analyses](#) FEWS NET has published on the Israel-Hamas conflict. While FEWS NET's reports typically do not account for events beyond the end of the reporting month, **this report reflects events through October 11, 2024**, given significant developments in early October. FEWS NET has no operational presence in Gaza; its approach to monitoring and mapping acute food insecurity in Gaza differs from its typical [reporting countries](#). The analytical framework and methods of analysis are consistent with project-wide approaches.

Significant food supply shortages threaten worsening hunger and malnutrition

Key Messages

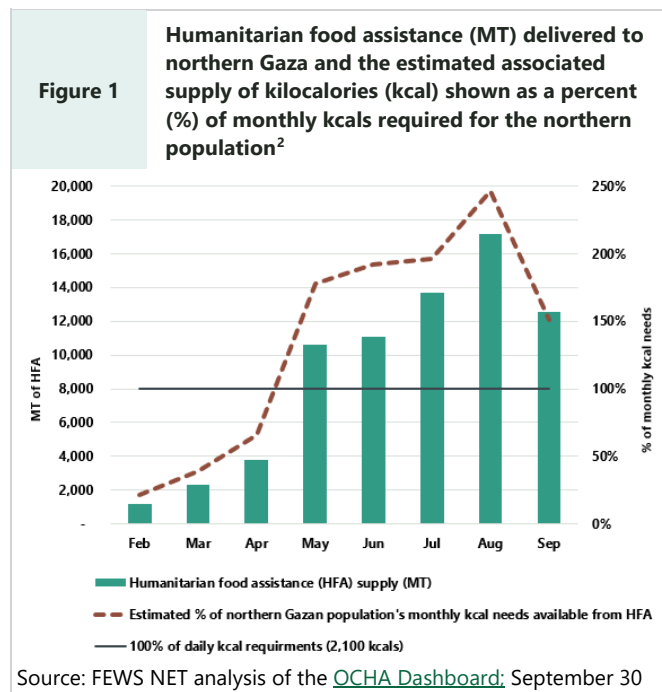
- **Despite the continued entry of humanitarian and commercial food supplies into Gaza in September alongside a slight lull in conflict intensity that partially alleviated constraints on food access, Emergency! (IPC Phase 4!)¹ outcomes persist. Furthermore, developments in early October are raising alarm that circumstances identified as being part of the scenario that would lead to Famine (IPC Phase 5) may be materializing.** As of October 11, both humanitarian and commercial food supply has reportedly been cut off in the north amid the new Israeli Defense Force (IDF) offensive and mass evacuation orders in October. The south is also facing significant reductions in commercial food supply. To avert Famine (IPC Phase 5), a substantial scale-up in the supply and distribution of humanitarian food and nutrition assistance, as well as the unrestricted facilitation of commercial food delivery, must occur across Gaza.
- **The closure of both northern border crossings (Erez and Erez West) in early October and new Israeli restrictions on the entrance of commercial food supply in the south have resulted in a drastic decline in the delivery of humanitarian and commercial food supply to Gaza in the first 10 days of October.** In August, [FEWS NET assessed](#) that Famine (IPC Phase 5) would likely occur in the event of a prolonged reduction in humanitarian food assistance in the north (where commercial food supply has been severely limited) and sustained low humanitarian food assistance in the south. FEWS NET assessed that a concurrent reduction in commercial food supply would lead to more rapid deterioration in the south. Levels of acute malnutrition and starvation will rise rapidly if deliveries do not resume and/or populations remaining in the north are cut off from food for multiple weeks.
- **The events identified in FEWS NET's [Risk of Famine \(IPC Phase 5\)](#) scenario started to occur in early October. While humanitarian and commercial food stocks from prior months as well as nutrition services are likely preventing a sharp deterioration in outcomes in early October, this remains of high concern.** Malnutrition and mortality from hunger are lagging indicators, and deterioration to Famine (IPC Phase 5) thresholds takes time to manifest. If humanitarian and commercial supplies remain heavily restricted or suspended throughout October, FEWS NET would likely change its current Risk of Famine (IPC Phase 5) statement to a projection of Famine (IPC Phase 5). However, the time it would take for Famine to manifest would be determined by the exact quantities of food and nutrition support within Gaza in the coming weeks and months and, consequently, the evolution of malnutrition and mortality.



¹ As shown in the acute food insecurity map legend, the (!) signifies that outcomes would be at least one phase worse without current or planned humanitarian food assistance.

Key Developments in September and early October

- In northern Gaza, while IDF clearing operations and targeted raids occurred at relatively low levels in September, the conflict rapidly and severely deteriorated with the IDF's large-scale ground invasions and resumed attacks in multiple parts of the north in early October.** Following the Israeli Security Cabinet announcement that displaced northern residents could [return to their homes](#) in mid-September, the [IDF resumed military operations](#) in the north on October 6, particularly Jabaliya, Beit Lahiya, Beit Hanoun, and Sheikh Radwan (all under active siege at the time of writing). Since October 6, the IDF has targeted Jabaliya with some of the most intense air strikes and shelling recorded since the start of the war, including [besieging](#) Jabaliya camp and destroying residential and humanitarian infrastructure. Following the start of attacks, the IDF issued mass evacuation orders for 66 square kilometers (km²) of the north, including three hospitals in the north and other key humanitarian infrastructure, such as nutrition clinics and WASH facilities. While civilians were directed to the Al-Mawasi "humanitarian zone" in south Gaza, the estimated [50,000 people](#) that have reportedly been forcibly displaced so far in October are largely [relocating internally within the north](#) to Gaza City. Few have reportedly travelled south across the Netzarim Corridor due to the substantiated fear of attacks en route to and in Al-Mawasi, as well as the extremely poor living conditions, effectively trapping the population in the north. FEWS NET is closely monitoring the volatile dynamics in the north.
- Revised estimates of humanitarian food supply based on UN data indicate higher levels of assistance entered the north from May to September than previously assessed; however, as of October 11, no humanitarian food assistance has entered northern Gaza since the borders closed on October 2. This is of high concern given that the northern population remains heavily reliant on humanitarian food assistance amid extremely limited commercial food supply to the north.** Based on newly available data compiled by [OCHA](#),³ the humanitarian food assistance supply has been equivalent to well over 100 percent of the northern population's minimum required kilocalories for the past consecutive five months (May to September). Revised estimates indicate that in August alone, 17,174-18,984 metric tons (MT) of food assistance reportedly entered the north – enough to cover an estimated 220-245 percent of the northern population's minimum daily caloric requirement (2,100 kcals per person per day)⁴ – a new peak in the north since the start of the war (Figure 1). In September, [FEWS NET assessed](#) that approximately 11,932-13,188 MT of food assistance entered northern Gaza.⁵ This amount is equivalent to an estimated 155 percent of the minimum daily caloric needs of the roughly 430,000 people in the north. However, with the resurgence of IDF ground operations in the north in early October, both northern border crossings have been closed since October 1, effectively



² When calculating kcal coverage per population group, FEWS NET updates population figures when new population data becomes available from OCHA. For the north, the February to June months reflect the minimum caloric requirement for a population of 300,000 people; for July/August the analysis reflects a population of 350,000 people, and from September onwards, the analysis reflects a population of 430,000 people.

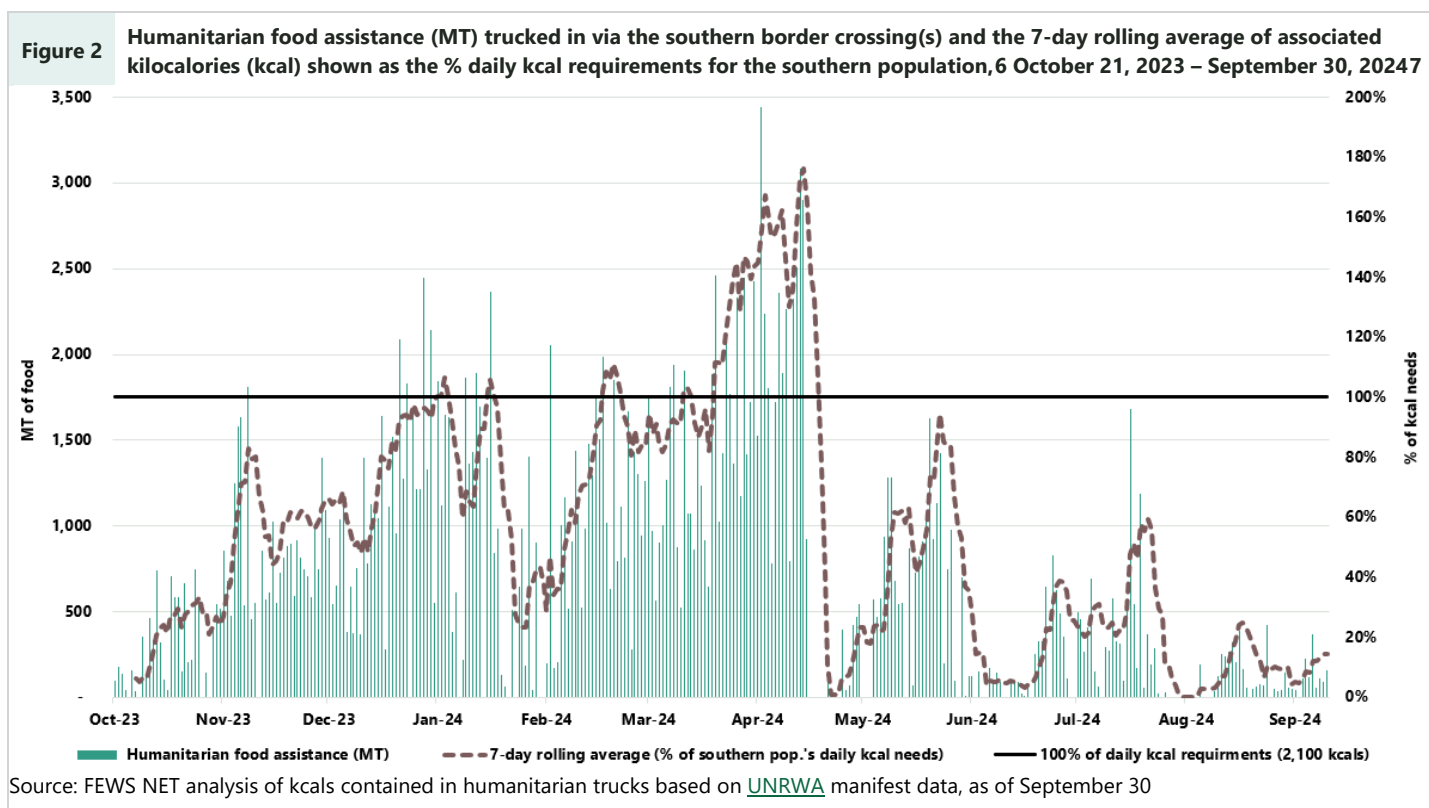
³ See Annex B, Table 1 of FEWS NET's [September Food Supply Report](#) for updated humanitarian food supply estimates from April to September.

⁴ FEWS NET estimates caloric availability of food assistance by calculating the caloric value of the food assistance cargo indicated on UNRWA's manifests using either NutVal or USDA resources. While FEWS NET recognizes not all humanitarian food aid that enters Gaza reaches the Gazan population, this method can provide an approximation that can then be contextualized using distribution reports and field information.

⁵ As detailed in the FEWS NET [September Food Supply Report](#), bureaucratic- and security-related disruptions led to reduced flow of humanitarian assistance into northern Gaza in September, resulting in a 25 percent decline in humanitarian food supply since August. However, despite the decline, food assistance supply remained substantial.

[cutting off both humanitarian and commercial food supply](#) to the north. While the considerable humanitarian food supply from May to September is expected to partially bridge the gap in humanitarian food supply in early October, it is unclear how long supplies will last. Additionally, several humanitarian agencies have suspended operations and halted distributions, limiting access to the remaining food supplies from the previous months.

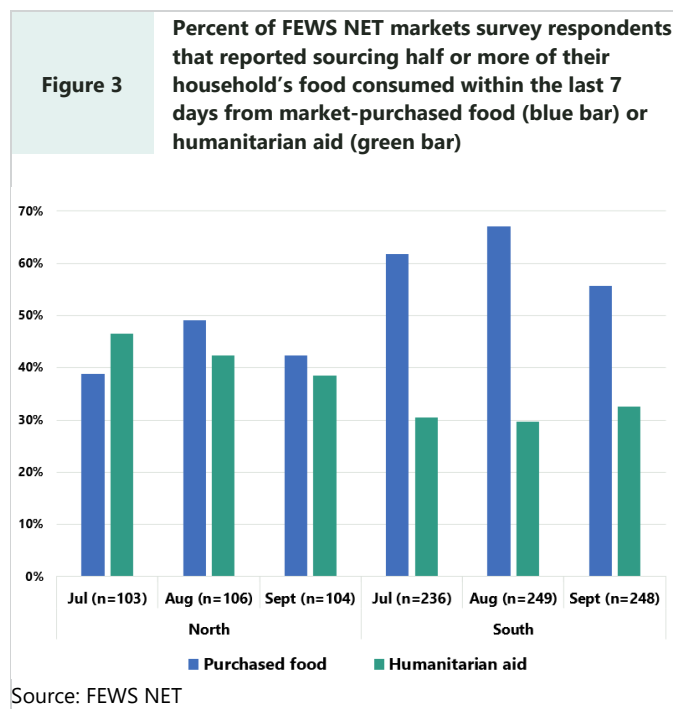
- In southern Gaza, clearing operations, targeted raids, and clashes between Israel and Hamas continued at a significantly reduced scale in September, followed by a resurgence of attacks – particularly in Deir al-Balah and parts of Khan Younis – in early October.** In the south, following the substantial scale-up in conflict in Khan Younis and Deir al-Balah governorates in July and August detailed in [FEWS NET’s August Targeted Analysis](#), conflict in September in southern Gaza slowed considerably, particularly with the shift in focus towards the Israel/Lebanon border. In early October, however, the IDF resumed airstrikes and small-scale ground operations in Deir al-Balah and Khan Younis, and issued [new evacuation orders](#) for northern Deir al-Balah and central Khan Younis in the first week of October. While conflict in October has not reached levels seen in July/August in the south, the situation remains highly volatile and an estimated [90 percent](#) of the population remains displaced in abhorrent conditions, largely concentrated in the densely populated and overcrowded Al-Mawasi “humanitarian zone,” a mere [41 km²](#). Displaced populations currently only have an average of [1.5 m² per person](#), less than half the [international minimum standard](#) of 3.5 m² per person in camp settings.



⁶ OCHA released revised population estimates per governorate derived from updated data collected during the Poliovirus vaccination campaign in early September. The updated figures indicate 749,854 people in Deir al-Balah, 915,848 in Khan Younis, 44,201 in Rafah, 174,818 in North Gaza, and 255,897 in Gaza governorates, summing to a total 2.14 million people in the Gaza Strip. As such, FEWS NET’s September analysis of kcal coverage reflects a population of roughly 1.7 million in the south and 430,000 in the north. FEWS NET used OCHA’s previous estimates for July and August (1.79 million in the south and 350,000 in the north) and prior to July (1.93 million people in the south and 300,000 in the north).

⁷ UNRWA retroactively updates its dataset each month with cargo not previously recorded for relevant months. Due to these updates, as well as other data challenges highlighted in FEWS NET’s [September Food Supply Report](#), the food assistance supply illustrated historically here is higher than in previous reports.

- Despite the reduction in active hostilities in September in the south, humanitarian food assistance supply through Gaza's southern border crossing declined for the fifth consecutive month in September. These supply levels were the lowest recorded since October 2023, and the entry of food assistance in early October 2024 remains extremely limited.** Based on [FEWS NET's analysis of updated UNRWA data](#),⁸ only approximately 3,796 to 4,196 MT of humanitarian food assistance entered via truck through Kerem Abu Salem/Kerem Shalom (KAS/KS) in September (Figure 2).⁹ This is sufficient to cover only 10-15 percent of the southern Gazan population's daily caloric requirements (compared to 15-20 percent in August), equating to less than four days of food for the month compared to approximately six days of food in August, and 15 days of food in May.
- FEWS NET is extremely concerned about reports that commercial supply to Gaza is being severely restricted through southern crossings, as commercial food has played a critical role in partially mitigating the severity of food consumption gaps in the south amid the large-scale disruptions to humanitarian food supply since May.** Informal markets remain the primary food source in the south: indicative findings from FEWS NET's September markets survey¹⁰ (n=104 in the north, n=248 in the south) suggest nearly 60 percent of respondents (138 of 248 respondents) reported that half or more of the food their household consumed in the last seven days was purchased (Figure 3). While [estimated commercial food](#) inspected and approved for entry by Israel's Coordination of Government Activities in the Territories (COGAT) remained relatively substantial in southern Gaza in September (42,199-46,641 MT),^{11,12} reported [Israeli restrictions on commercial food entry](#) in early October have resulted in a significant threat to food availability in the south. According to the Logistics Cluster, in early October, COGAT enacted a policy limiting commercial truck approvals to 50 per day at the KAS/KS crossing, a significant reduction from the average 85-90 commercial trucks carrying food approved per day from May to September. However, preliminary COGAT data available through October 11 reflect that no commercial food trucks have been approved for entry through KAS/KS since October 1 (although future updates to the dashboard may suggest a different trend),¹³ and anecdotal evidence indicates a substantial proportion of the commercial trucks that entered on October 1 were looted. While the remaining commercial supply from June through September may help bridge a temporary supply gap if the policy restrictions persist further into October, it is unclear how long that supply



⁸ The UNRWA dataset has been the most consistent, publicly accessible dataset on humanitarian food supply since October 2023, particularly for southern crossings. At KAS/KS, UNRWA reports humanitarian trucks that they have collected and dispatched from the border into Gaza.

⁹ KAS/KS is the only southern border crossing that remains open in the south. The Rafah crossing has been closed since May 5.

¹⁰ FEWS NET commissioned two separate non-representative Computer Assisted Telephone Interview household-level surveys in September. The food security survey collected data on food security outcome indicators and food assistance between September 6-19 (n=209 in the north [North Gaza and Gaza City] and n=452 in the south [Rafah, Khan Younis, and Deir al-Balah]). The markets survey collected data on markets and household income between September 5-17 (n=104 in the north [North Gaza and Gaza City] and n=248 in the south [Rafah, Khan Younis, and Deir al-Balah]). Findings are indicative, not representative.

¹¹ The cargo that COGAT approves for entry does not necessarily translate to actual market supply or direct access to food among the population.

¹² Given the sustained high levels of commercial supply in September, WFP's [October Market Monitor](#) reflecting September price trends indicates that, while prices remain much higher than pre-war levels, most food prices eased in September to lower levels than observed in August.

¹³ According to the [COGAT dashboard](#), as of October 11, commercial food trucks are only recorded on October 1, when 48 commercial food trucks were inspected and approved for entry. Only non-food items have been approved since then, according to data uploaded to date. However, it is possible that the dashboard will be updated later in the month, as has occurred in the past.

could last. In fact, a FEWS NET key informant reports that food supply in markets is scarcer in early October than observed from July through September, and prices of several food commodities have already increased.

- Across Gaza, humanitarian access constraints remained extremely detrimental to the provision of life-saving humanitarian assistance and services.** Organized, targeted looting of humanitarian and commercial trucks has become pervasive, with anecdotal reports indicating a considerable portion of trucks are being targeted. Additionally, social disorder, fuel supply shortages, infrastructure damage, and bureaucratic- and insecurity-related barriers continue to severely restrict the ability of humanitarian actors to distribute available food assistance. In September, fewer than 50 percent of humanitarian missions seeking request for approval were facilitated,¹⁴ and nearly 30 percent were planned but not completed.
- These severe operational constraints continue to compound the impacts of the substantial decline in humanitarian food supply, resulting in further disruption to the distribution of food assistance and limiting food access.** In September, due to supply shortages as well as physical and bureaucratic barriers, WFP reported distributing only [146,115 partial food parcels](#) across the strip, 65-70 percent fewer than what they reported delivering in July. In September, beneficiaries in the south received only one partial food parcel for the [third consecutive month](#). As of October 11, [WFP](#) reported there have been [no food parcel distributions](#) in the south in October, rendering households increasingly reliant on commercial food purchases (to the extent that they have the financial ability to make such purchases). Meanwhile, while the lull in conflict in September supported an increase in the provision of hot meals from kitchens across Gaza – enough to feed an estimated 25-30 percent of the Gazan population one meal daily – hot meal distribution has also declined in early October with the reduced supply and increased insecurity. Similarly, bakery functionality has deteriorated since September. While the Food Security Sector (FSS) reported 14 of the 19 WFP-supported bakeries were operational through September (all bakeries outside of Rafah), bakery functionality has become highly volatile and is shifting daily due to active hostilities and supply shortages. According to the FSS, as of October 11, 10 bakeries were operational: four in Gaza City, five in Deir al-Balah, and one in Khan Younis.
- Hunger and malnourishment remain dire in Gaza, and hunger-related mortality is likely still occurring through early October. Available evidence suggests that, while the situation remains extremely alarming, Famine (IPC Phase 5) thresholds were likely not crossed in September in the north or south.** Food consumption deficits remain unacceptably large, although available food consumption outcome indicator data suggest that caloric deficits are stable below Famine (IPC Phase 5) thresholds in September.¹⁵ Similarly, levels of acute malnutrition remain atypically elevated but well below Famine (IPC Phase 5) thresholds; Middle Upper Arm Circumference (MUAC) nutrition screening data for August and September suggest proxy global acute malnutrition (GAM) prevalence among children under five remains stable in both the north (estimates range from 0.3 percent to 10.4 percent across northern governorates, with 26,244 total combined screenings) and south (estimates range from 0.6 to 9.6 percent across southern governorates, with 29,741 total screenings), suggesting a range of Acceptable (<5 percent) to Serious/Critical (10-14.9 percent) levels. While representative data on non-trauma mortality remains unavailable to FEWS NET, given that neither the evidence on food consumption nor acute malnutrition pass Famine (IPC Phase 5) thresholds and in the absence of frequent and substantial anecdotal evidence of hunger-related deaths, it is also unlikely that hunger-related mortality has reached Famine (IPC Phase 5) levels.
- FEWS NET currently assesses that Emergency! (IPC Phase 4!) outcomes will most likely be sustained through December and Famine (IPC Phase 5) will remain a credible alternative scenario. It should be emphasized that Emergency! (IPC Phase 4!) outcomes as currently ongoing in Gaza reflect an extreme and unacceptable situation, marked by irreversible physiological impacts and high levels of death due to hunger and the**

¹⁴ [Facilitated movements](#) include humanitarian missions that Israel's Coordination and Liaison Administration (CLA) approves, and the ground movement is not impeded, blocked, or delayed.

¹⁵ Non-representative food consumption outcome indicator data collected via FEWS NET's food security surveys in September (n=661) suggest the severity of caloric deficits are relatively consistent among respondents in both the north and the south with levels seen in August, based on the Household Hunger Score (HHS) indicator. Among respondents, the proportion experiencing severe (IPC Phase 4) or very severe (IPC Phase 5) hunger has stabilized between 14-16 percent in September in the north and south.

interaction of starvation and disease. Updated data indicate that the humanitarian food supply to the north was significantly higher from May to September than previously assessed. This food assistance is likely the key factor mitigating the severity of malnutrition and mortality in the north as of early October. In southern Gaza, humanitarian food assistance - though at lower levels - has also been critical to mitigating caloric deficits and malnutrition through early October, supplemented by a substantial nutrition response since June and a considerably higher commercial food supply. However, malnutrition and non-trauma mortality are lagging indicators, and deterioration to Famine (IPC Phase 5) thresholds takes time to manifest in the wake of increased food consumption gaps. As such, the impacts of more recent supply shortages are likely not yet reflected in current nutrition outcomes. **If humanitarian and commercial supplies remain heavily restricted or suspended throughout October, then FEWS NET would likely change its current Risk of Famine (IPC Phase 5) statement to a projection of Famine (IPC Phase 5).** However, the time it would take for Famine to manifest would be determined by the exact quantities of food and nutrition support within Gaza in the coming weeks and months and, consequently, the evolution of malnutrition and mortality.

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