

FINDINGS FROM ARAB BAROMETER WAVE IX · 2025

Higher Costs, Harder Choices

Food insecurity across the Middle East and North Africa,
in the words and numbers of 10,000+ households

1 in 2

households in six of eight countries
surveyed ran out of food and could not
afford more

About this study

Arab Barometer is the largest repository of publicly available survey data on the Middle East and North Africa. Its ninth wave, conducted between August and November 2025, captures how households across eight countries experience the cost of food — what they can afford, what they give up, and what they fear next.

This excerpt focuses on food security: the share of households running out of food, skipping meals, and worrying about where the next one comes from — before and as a regional conflict reshapes prices across the region.

8

countries surveyed: Egypt, Iraq, Jordan, Lebanon, Morocco, Palestine, Syria, Tunisia

10,000+

face-to-face interviews, nationally representative in each country

±3pp

maximum margin of sampling error in each country

**Aug-
Nov**

2025 fieldwork window, completed before the latest price shocks

Three findings

01

The baseline is already a crisis

In six of eight countries, at least half of households report running out of food without being able to afford more. In most countries, a third or more skip meals for financial reasons.

02

The war is a shock multiplier

Disruption at the Strait of Hormuz — a chokepoint for roughly 20% of the world's oil and gas — is driving up fuel, fertilizer, and food production costs across a region that imports most of what it eats.

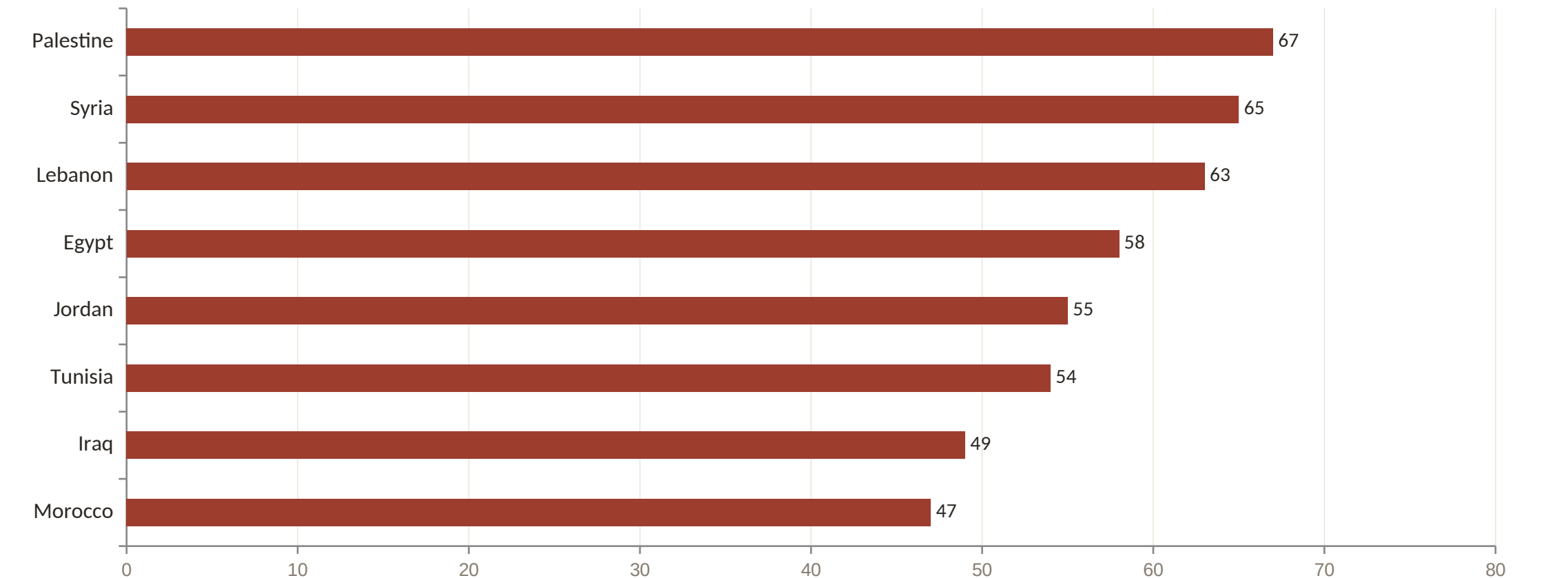
03

The most exposed have no buffer

The World Food Programme warns the conflict could push 45 million more people into acute hunger globally. MENA households, already stretched, are among the most exposed on earth.

In six of eight countries, at least half of households ran out of food

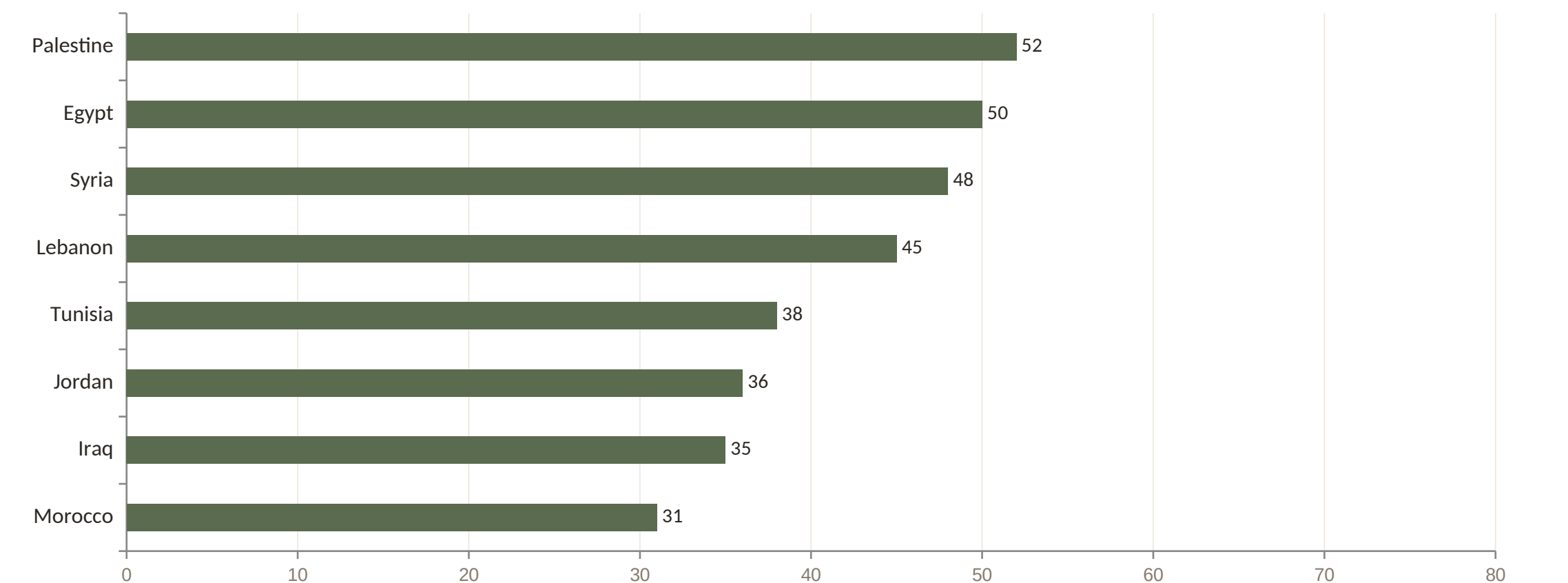
Q: In the past 30 days, did your household run out of food without money to buy more? · % answering yes



Demo values for layout — replace with exact figures from the Arab Barometer online analysis tool before publication.

Skipping meals is how households absorb the shock

Q: In the past 30 days, did you or household members skip a meal because there was not enough money for food? · % answering yes



Demo values for layout — replace with exact figures from the Arab Barometer online analysis tool before publication.

How a distant strait reaches the dinner table

The transmission chain from regional escalation to household food insecurity



Shocks to food systems lag the events that cause them: today's fuel and fertilizer costs become next season's bread prices.

COUNTRY PROFILE

Egypt

The region's most populous country entered the crisis already stretched. Authorities have introduced measures to contain the fallout — limiting business hours, raising fuel and transport prices — that may stabilize the economy while squeezing the most vulnerable households harder.

6 in 10

Egyptians report frequent worry about securing enough food for their household

~50%

say they have skipped meals due to financial constraints

45%

identify inflation as the country's most pressing economic challenge

Figures reported before the latest escalation — pressures have since intensified.

Higher Costs, Harder Choices — Food Insecurity Across MENA

COUNTRY PROFILE

Iraq

Iraq illustrates the region's structural exposure most clearly: a food system built on imports, with significant reliance on supply lines that run through the conflict zone itself — including wheat and dairy from Iran. Disruptions to trade flows translate into immediate consequences at the market stall.

~70%

of Iraq's food supply is imported, among the highest dependence in the region (FAO)

**Nearly
half**

of Iraqis expressed concern about whether they would have enough to eat

1 in 3

report household members skipping meals due to financial constraints

Import-dependence figure: FAO. Survey figures: Arab Barometer Wave IX — verify exact values before publication.

Higher Costs, Harder Choices — Food Insecurity Across MENA

A structural failure needs structural answers

Food insecurity in MENA is not an individual failure. It is driven by domestic policy shortcomings, economic inequality, and exposure to external shocks — and each new crisis hits harder than the last.

Strengthen social protection

Targeted transfers and food assistance that reach households before coping turns into crisis — not after.

Protect purchasing power

Shield essential food items from price spikes through strategic reserves, subsidies, and supply agreements.

Build supply resilience

Reduce single-source import dependence and invest in regional production and storage capacity.

Sources & method

Survey data

Arab Barometer Wave IX (2025). Eight nationally representative surveys, 10,000+ face-to-face interviews, margin of error ± 3 pp per country. Fieldwork Aug–Nov 2025. Data freely available at arabbarometer.org/survey-data.

Supporting sources

World Food Programme conflict impact projections (2026) · FAO food import-dependence analysis · Arab Barometer Arab Pulse: “Higher Costs, Harder Choices” (April 2026)

About this document

A self-initiated design study by Limn Studio. Not produced for, affiliated with, or endorsed by Arab Barometer. Chart values marked as demo are placeholders pending verification against the source data.

LIMN

S T U D I O

*to limn (v.) — to illuminate
a manuscript; to depict in
clear, vivid detail*