FOOD SECURITY SNAPSHOTS

- Favourable autumn rains facilitating planting and securing moisture reserves for crop development
- Above-average cereal harvest gathered in 2019 following favourable weather conditions
- Cereal import requirements in 2019/20 decreasing
- Prices of wheat stable or increasing, inflation easing
- High levels of food insecurity prevail

Favourable rains facilitate planting and secure moisture reserves for crop development
Planting of winter wheat and barley started in late October, and is ongoing under favourable conditions with timely and abundant rains facilitating sowing and crop establishment. The majority of the wheat grown in the country is of winter cultivation. Given the above-average rains so far and the limited livelihood opportunities in the non-agricultural sectors, it is likely that the area planted with winter wheat will be above the average of about 2.5 million hectares.

Farmers usually plant saved seeds but efforts to expand sowing of improved seeds are underway by the Government. FAO distributed 4 725 tonnes of certified seeds to 94 500 families.

Adequate snow volumes in mountain areas during the winter are critical for crop development and availability of irrigation water for spring crops.

Above-average cereal harvest gathered in 2019 due to favourable weather conditions
Owing to abundant and well-distributed precipitation, cereal production recovered from the 2018 drought-stricken harvest. About 6.1 million tonnes of cereals were harvested in 2019, over one-third above the outturn in 2018 and 7 percent above the five-year average. Lack of certified seeds, particularly for rainfed areas, constrained the yield potential which could have been attained given favourable weather conditions. Above-average precipitations also benefitted pasture availability in most rangelands, supporting livelihoods relying on livestock rearing.

According to the 2018 Opium Survey (released in July 2019), the 2018 total area under opium poppy cultivation was estimated at 263 000 hectares. Although this figure shows a decrease of 20 percent compared to the previous year, attributed mostly to drought, the 2018 area under opium poppy cultivation remained...
at high levels. The majority of the cultivation took place in the southern part of the country. In Hilmand, the major opium-cultivating province, one-third of the arable land was planted with poppy. Potential opium production in 2018 is estimated at 6 400 tonnes, about 30 percent less than the 2017 record output.

**Decreasing cereal import requirements in 2019/20**

Reflecting the increased domestic harvest obtained in 2019, the cereal import requirements (mainly wheat) in the 2019/30 marketing year (July/June) are forecast at 2.3 million tonnes, 30 percent lower than in the previous year and 18 percent below the five-year average. Even during years with above-average domestic wheat production, the country imports large quantities of wheat flour due to the inadequate domestic milling capacity. Imported flour is often blended with domestic flour in order to improve its protein content.

**Prices of wheat increasing or stable, levels of inflation easing**

Despite the above-average domestic cereal harvest, prices of wheat grain increased in all markets in July-August 2019, following the announcement of the Government of Pakistan to ban exports of wheat and wheat flour. A partial resumption of exports of wheat flour and related items from Pakistan was reported in early October. Pakistan and Kazakhstan are the main sources of wheat and wheat flour of the country. Large price differentials persist among different areas of the country. For instance, wheat grain is about 25 percent more expensive in Kandahar than in Herat.

Inflation rates, which were less than 1 percent in the first quarter of 2019, reached almost 5 percent in May 2019 and have eased since then to 2 percent in September 2019 (last data available). The food component of the CPI, which has been negative for most of 2018, increased dramatically to 7 percent in May 2019 before decreasing to 4 percent in September 2019. The overall inflation rate in the country is largely determined by changes in prices of food products. Despite generally low international prices, higher the inflation rate is supported by weak the local currency and strengthening domestic demand mainly due to the returns of refugees, mostly from Pakistan and the Islamic Republic of Iran.

**High levels of food insecurity**

Between August and October 2019, about 10.2 million people (one-third of the total population) were estimated to be in severe acute food insecurity and required urgent humanitarian action. It included around 7.8 million people in IPC Phase 3: “Crisis” and 2.4 million people in IPC Phase 4: “Emergency”. About 10.4 million people were also in IPC Phase 2: “Stressed” and required livelihood support. Continuing conflict, natural hazards and limited economic opportunities have increased the vulnerability of the poorest households, including subsistence farmers.

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