



GLEWS Country Brief Afghanistan

Reference Date: 21-June-2018

FOOD SECURITY SNAPSHOT

- Below average cereal output forecast for 2018 following dry weather conditions
- Cereal import requirements in 2018/19 increasing
- Wheat prices generally stable, inflation easing
- High levels of food insecurity

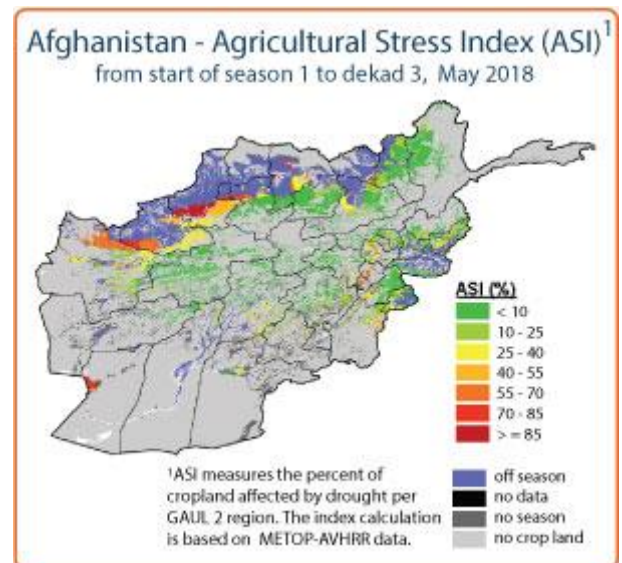
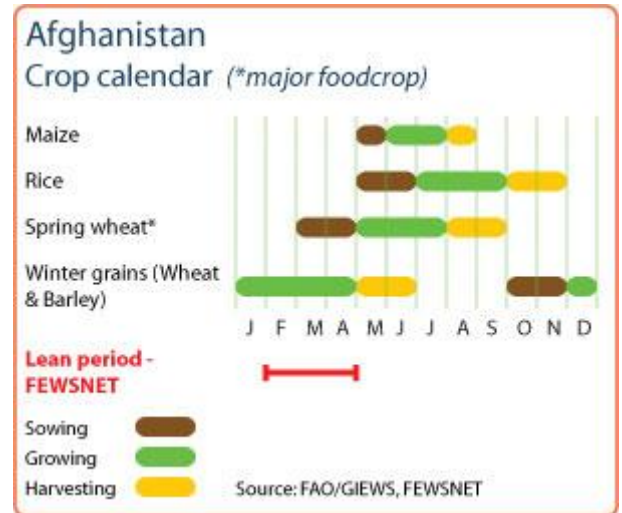
Below average cereal output forecast in 2018 following dry weather conditions

The winter wheat and barley harvest started in May and will finish by the end of June. The spring wheat harvest will continue in the mountainous areas in the northeast until the end of September.

A late onset of rains, in some areas by as much as two months, hampered the planting of the 2018 winter crops. Many farmers waited until spring with sowing. The cumulative snow pack was well below normal levels, constraining moisture reserves for crop development and limiting irrigation water supplies for spring crops, particularly in northern provinces of Jawzjan and Balkh. Spring rains in March and April, favourable for spring wheat plantings throughout most of the country, did not replenish the moisture deficits accumulated in the winter in the rainfed areas. Overall, below-average precipitation coupled with above-average temperatures prevalent throughout the Central Asia region since October restricted cereal production. Consequently, a below-average cereal harvest of 4.7 million tonnes is expected. The preliminary wheat production forecast indicates an 18 percent reduction from last year and a decline of 28 percent compared to the five-year average. The decreased rainfed production will particularly affect the livelihoods of subsistence farmers.

Below-average precipitation also generally constrained pasture availability in the rangelands, with localized exceptions, compromising livelihoods relying on livestock rearing.

According to the 2017 Opium Survey (currently the last available), the 2017 total area under opium poppy cultivation was set at 328 000 hectares, with an increase of 63 percent compared to the previous year. It sets a new record high, about 46 percent above the previous record of 224 000 hectares reported in 2014. The majority of the cultivation takes place in the southern part of the country. In Hilmand, the major opium-cultivating province, one-third of the arable land is planted with poppy. Potential opium production in 2017 was estimated at



9 000 tonnes, with an increase of about 90 percent from the 2016 level and well above the 2014 record output of 6 400 tonnes.

Increasing cereal import requirements in 2018/19

The cereal import requirements (mainly wheat) in the upcoming 2018/19 marketing year (July/June) are forecast at 3.3 million tonnes, 8 percent higher than in the previous year and over 25 percent above the five-year average. Cereal stocks currently in the country are likely to prevent a steeper increase in imports but are not sufficient to keep import requirements stable compared to the previous year. Even in years with above-average domestic production, the country imports significant quantities of wheat flour, reflecting the lack of adequate domestic milling capacity and problems of cost effectiveness. Imported wheat and wheat flour are often blended with domestic wheat to improve its protein content.

Wheat prices generally stable, levels of inflation easing

Despite the unfavourable prospects for the domestic cereal production, wheat grain prices remain generally stable, reflecting export availability and price stability in both Pakistan and Kazakhstan, the main sources of wheat and flour to the country.

Inflation rates, which were fluctuating between 3 and 5 percent since July 2017, have approached 0 percent in March 2018 (last data available). The food component of the CPI recorded a negative 1.6 percent in March 2018, compared to around 10 percent a year ago. Low inflation rates are supported by declining international energy and food prices, stable exchange rates, as well as weak domestic demand resulting from the deteriorating domestic security situation.

High levels of food insecurity

Overall food insecurity in the country is on the rise. In spring 2018, almost 2.2 million people were considered to be chronically food insecure, of which 1.4 million people are at risk of acute food insecurity due to drought. Continuing conflict, natural hazards and limited economic opportunities have increased the vulnerability of the poorest households, including subsistence farmers.

So far, in 2018, over 100 000 people have been displaced by conflict, adding to the 500 000 displaced in 2017 and over 650 000 displaced in 2016. A large share of displacements are located in the hard-to-access areas. Documented and undocumented Afghans have been returning to the country for a variety of reasons, including deteriorating protection space in Pakistan and the Islamic Republic of Iran. In the first four months of 2018, almost 12 000 Afghans returned from Pakistan and 230 000 from the Islamic Republic of Iran, adding to the 1.2 million undocumented Afghans who returned to the country in 2016 and 2017. Most returnees need support to be socially and economically reintegrated.

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Afghanistan

Cereal production

	2013-2017	2017	2018	change
	average			2018/2017
	000 tonnes			percent
Wheat	4 809	4 280	3 500	-18
Rice (paddy)	642	500	465	-7
Barley	428	400	429	7
Others	321	315	321	2
Total	6 201	5 495	4 715	-14

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets

Afghanistan

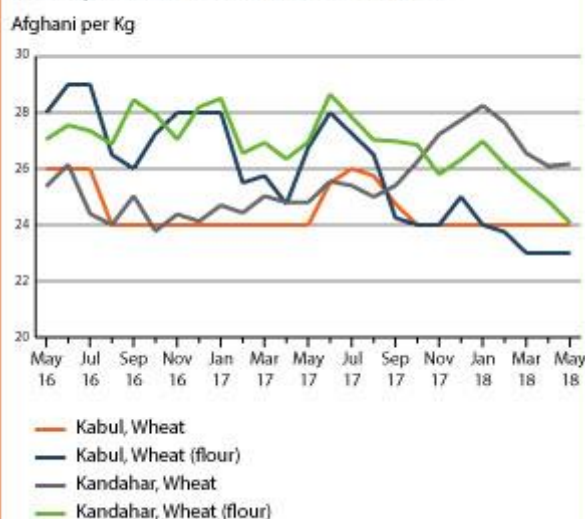
Total cereal production and imports



Notes: Total cereal includes rice in milled terms. Split year refers to individual crop marketing years.
Source: FAO/GIEWS Country Cereal Balance Sheets

Afghanistan

Retail prices of wheat and wheat flour



Source: Vulnerability Analysis and Mapping (VAM) - WFP