



## GIEWS Country Brief the Kyrgyz Republic

Reference Date: 29-February-2024

### FOOD SECURITY SNAPSHOT

- Cereal production in 2023 fell below average due to dry weather conditions
- Wheat import requirements in 2023/24 forecast below five-year average
- Prices of wheat flour remained almost unchanged at previous year's levels

### Cereal production in 2023 fell below average due to dry weather conditions

Harvesting of 2023 winter cereal crops, mainly wheat and barley, planted in October and November 2022, finalized between September and October 2023. The harvest of maize and minor spring wheat crops was completed last November under dry weather conditions as a result of climate change impact.

Outputs of wheat (winter and spring crops) and barley are officially reported at about 440 415 tonnes and 382 082 tonnes, respectively. With maize production reaching almost 800 000 tonnes, total cereal production for 2023 stands at 1.6 million tonnes, making the figure below the five-year average level. Drought conditions affected crop yields as a consequence of high temperatures and low availability of irrigation water.

Planting of 2024 winter cereal crops, to be harvested from next June, is ongoing under dry weather conditions.

### Wheat import requirements in 2023/24 forecast below five-year average

In the 2023/24 marketing year (July/June), wheat import requirements are forecast at 350 000 tonnes, below the five-year average. Wheat imports account, on average, for 95 percent of total annual cereal imports and cover almost half of the domestic consumption needs of wheat. In September 2023, the Ministry of Agriculture (MoA) introduced a six-month temporary ban on exports of wheat flour in order to regulate the food security of the country.

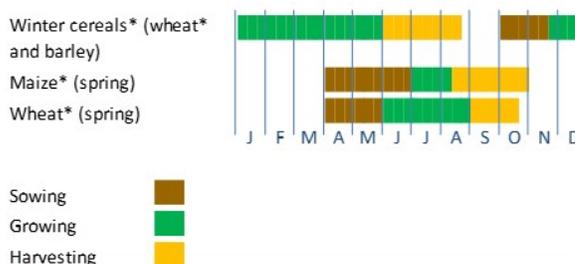
### Prices of wheat flour remained almost unchanged at previous year's levels

According to Kyrgyzstan's National Bank, the national Gross domestic product (GDP) is expected to grow 5 percent in 2023 and 5.1 percent in 2024. Inflation rate in 2023 was estimated at

### Kyrgyzstan

Crop Calendar

(\*major foodcrop)



### Kyrgyzstan

Cereal Production

	2018-2022 average	2022	2023 estimate	change 2023/2022
	000 tonnes			percent
Maize	709	733	799	9.0
Wheat	589	500	444	-11.2
Barley	450	572	382	-33.2
Others	47	47	50	4.9
<b>Total</b>	<b>1 795</b>	<b>1 852</b>	<b>1 675</b>	<b>-9.6</b>

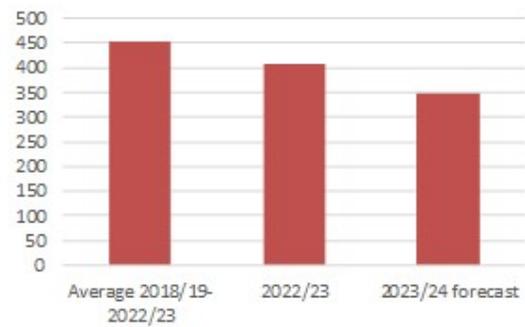
Note: Percentage change calculated from unrounded data.

10 percent (December 2023 to December 2022). Retail prices of first grade wheat flour increased between August and October 2023, then weakened in January 2024 reaching the same year-earlier levels.

## Kyrgyzstan

### Wheat Imports

000 tonnes

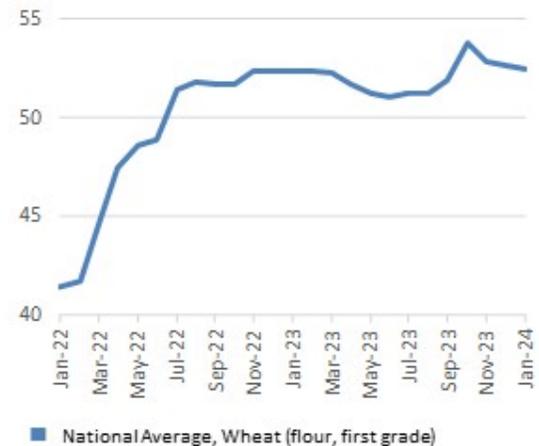


Note: Split years refer to crop marketing year.

## Kyrgyzstan

### Retail prices of wheat flour

Som per kg



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This brief was prepared using the following data/tools:

FAO/GIEWS Country Cereal Balance Sheet (CCBS) <https://www.fao.org/giews/data-tools/en/>.

FAO/GIEWS Food Price Monitoring and Analysis (FPMA) Tool <https://fpma.fao.org/>.

FAO/GIEWS Earth Observation for Crop Monitoring <https://www.fao.org/giews/earthobservation/>.

Integrated Food Security Phase Classification (IPC) <https://www.ipcinfo.org/>.



# GIEWS Country Brief Kyrgyzstan

Reference Date: 18-July-2022

## FOOD SECURITY SNAPSHOT

- Slightly above-average cereal production forecast in 2022
- Wheat import requirements in 2022/23 forecast at near-average level
- Prices of wheat flour increased since February 2022
- Expected reduction in remittances inflows in 2022

## Slightly above-average cereal production forecast in 2022

Harvesting of the 2022 winter cereal crops, mainly wheat and barley, is ongoing, while planting of spring cereals, mainly maize, finalized in June and harvesting is expected to begin in August. Weather conditions have been overall favourable during the season, benefitting yields of winter cereal crops (ASI map) at end-May, just before the harvest.

Total 2022 cereal production is forecast at about 1.7 million tonnes, 3 percent above the five-year average level. Maize and barley outputs are forecast at 690 000 tonnes and 440 000 tonnes, respectively, slightly above the five-year average volumes due to large plantings. The output of wheat (winter and spring crops) is forecast at a near-average level of 560 000 tonnes.

## Wheat import requirements in 2022/23 forecast at near-average level

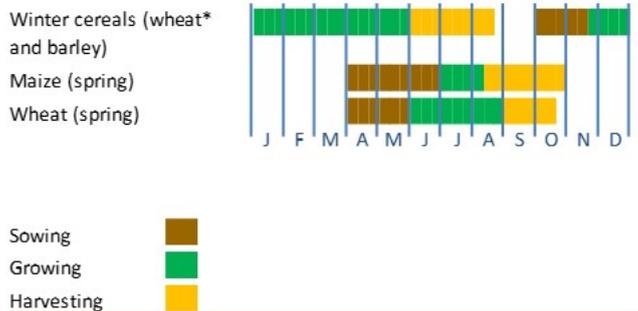
In the 2022/23 marketing year (July/June), wheat import requirements are forecast at a near-average level of 650 000 tonnes due to adequate availabilities, amid a favourable domestic production outlook. Wheat imports account, on average, for 95 percent of the total annual cereal imports and for almost half of the domestic consumption needs of wheat.

Wheat is mostly imported from the Russian Federation and from Kazakhstan. In the latter, restrictions on wheat exports were introduced on 14 April 2022 until 15 June 2022 and then extended until end-September 2022 ([FPMA Food Policy](#)). Similarly, in the Russian Federation, a ban on wheat exports towards countries in the Eurasian Economic Union (EAEU) was in place until 30 June 2022 ([FPMA Food Policy](#)). Some concerns

## Kyrgyzstan

### Crop Calendar

(\*major foodcrop)



Source: FAO/GIEWS.

## Kyrgyzstan

### Cereal Production

	2017-2021 average	2021	2022 forecast	change 2022/2021
	000 tonnes			percent
Maize	670	580	690	19.0
Wheat	562	364	560	53.8
Barley	418	260	440	69.2
Others	45	50	47	-5.0
<b>Total</b>	<b>1 695</b>	<b>1 254</b>	<b>1 737</b>	<b>38.6</b>

Note: percentage change calculated from unrounded data.

Source: FAO/GIEWS Country Cereal Balance Sheet.

over the capacity to cover wheat import requirements in the 2022/23 marketing year arise, amidst the possibility of new export restrictions by these countries.

On 17 March 2022, the Cabinet of Ministers of the country adopted [Resolution 140](#), providing for the six-month suspension of exports of some food products, including wheat and wheat flour. The measure was taken in order to curb the price increases and preserve food security.

## Prices of wheat flour increased since February 2022

National average retail prices of first grade wheat flour seasonally increased between February and June, supported also by elevated global export quotations and limited domestic availabilities due to the very low output harvested in 2021. Prices in June reached levels about 30 percent higher than a year before.

Prices of potatoes, another important staple food, remained overall stable between December 2021 and May 2022 and increased sharply in June, in line with seasonal patterns. Prices reached levels slightly above those in the corresponding month a year before following the harvest of a year-on-year lower output.

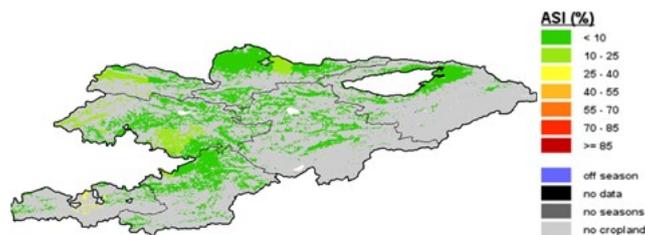
## Expected reduction in remittances inflows in 2022

In recent years, remittances accounted for about 30 percent of the country's Gross domestic product (GDP) and the majority originated from the Russian Federation. In 2022, the country is likely to experience a sharp reduction in remittances inflows, mainly due to the implementation of international sanctions against the Russian Federation, following the outbreak of the war in Ukraine. According to the [National Bank of the Kyrgyz Republic](#), in 2022, remittances may decline by over 20 percent year on year. In the Russian Federation, sanctions are expected to result in high unemployment rates and to negatively affect demand for goods and services, reducing work opportunities also for migrants. As a result, the food security situation of households, whose income is highly dependent on remittances, will likely deteriorate.

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## Kyrgyzstan - Agricultural Stress Index (ASI)

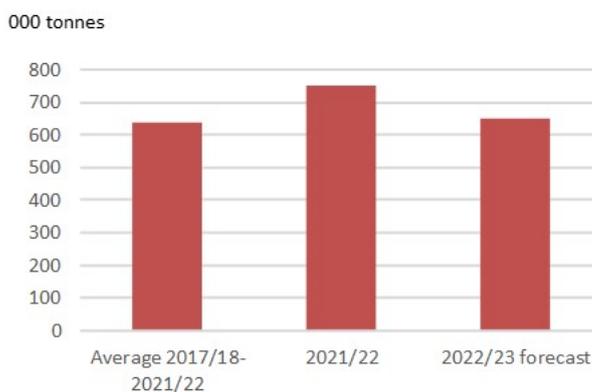
from start of season 1 to dekad 3, May 2022



Source: FAO/GIEWS Earth Observation System.

## Kyrgyzstan

### Wheat Imports

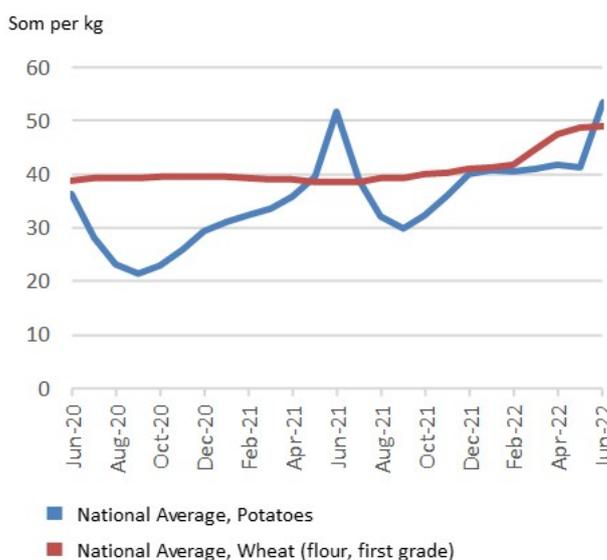


Note: Split year refers to crop marketing year.

Source: FAO/GIEWS Country Cereal Balance Sheets.

## Kyrgyzstan

### Retail potatoes and wheat flour prices



Source: FAO/GIEWS Food Price Monitoring and Analysis Tool.



# GIIEWS Country Brief Kyrgyzstan

Reference Date: 22-October-2021

## FOOD SECURITY SNAPSHOT

- Cereal production estimated well below average in 2021 mainly due to unfavourable weather conditions
- Wheat import requirements in 2021/22 forecast at well above-average level
- Prices of wheat flour remained overall stable at previous year's high levels

## Cereal production estimated well below average in 2021 mainly due to unfavourable weather conditions

Harvesting of the 2021 winter cereal crops, mainly wheat and barley, planted in October and November last year, finalized in August. The harvest of the maize crops started in August and will finalize by the end of October, while harvesting of the minor spring wheat crop was recently completed under overall favourable weather conditions.

The Chuy Province is annually responsible for about 60 percent of the barley output, 50 percent of the aggregate wheat output (winter and spring crops), and 30 percent of the maize output. In this region, weather conditions have been unfavourable between April and September 2021, with cumulative rainfall amounts about 70 percent lower than the long-term average and higher-than-average temperatures. According to the [World Food Programme \(WFP\)](#), shortages of irrigation water were also reported. All these factors reduced soil moisture levels with a negative impact on vegetation conditions and crops yields.

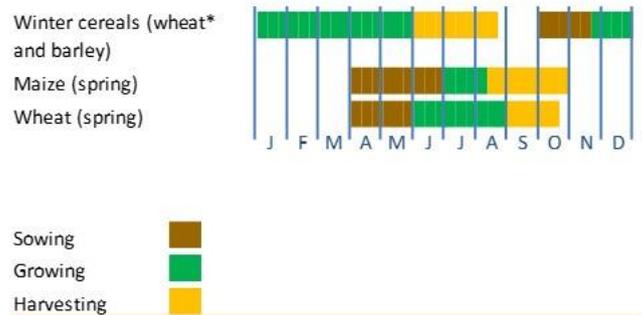
The outputs of wheat (winter and spring crops), and barley are officially estimated at about 364 000 and 260 000 tonnes, respectively, 40 percent below the average levels, despite large plantings. Including a preliminary (unofficial) estimate of a below-average level of 580 000 tonnes of maize, the total 2021 cereal production is forecast at about 1.3 million tonnes, well below the five-year average level of 1.8 million tonnes.

Planting of the 2022 winter cereal crops, for harvest from June next year, is ongoing under overall favourable weather conditions.

## Kyrgyzstan

### Crop Calendar

(\*major foodcrop)



Source: FAO/GIEWS.

## Kyrgyzstan

### Cereal Production

	2016-2020 average	2020	2021 estimate	change 2021/2020
	000 tonnes			percent
Maize	684	714	580	-18.8
Wheat	622	629	364	-42.1
Barley	449	510	260	-49.0
Others	44	48	46	-3.8
<b>Total</b>	<b>1 799</b>	<b>1 902</b>	<b>1 250</b>	<b>-34.2</b>

Note: percentage change calculated from unrounded data.

Source: FAO/GIEWS Country Cereal Balance Sheet.

## Wheat import requirements in 2021/22 forecast at above-average level

In the 2021/22 marketing year (July/June), wheat import requirements are forecast at 820 000 tonnes, well above the average volume as a consequence of the very low output obtained in 2021. Wheat imports account, on average, for 95 percent of the total annual cereal imports and for almost half of the domestic consumption needs of wheat.

## Prices of wheat flour remained overall stable at previous year's high levels

Retail prices of first grade wheat flour have been relatively stable and high in most markets since April 2020, when they surged in response to a spike in consumer demand at the start of the COVID-19 pandemic, but also supported by the depreciation of the national currency.

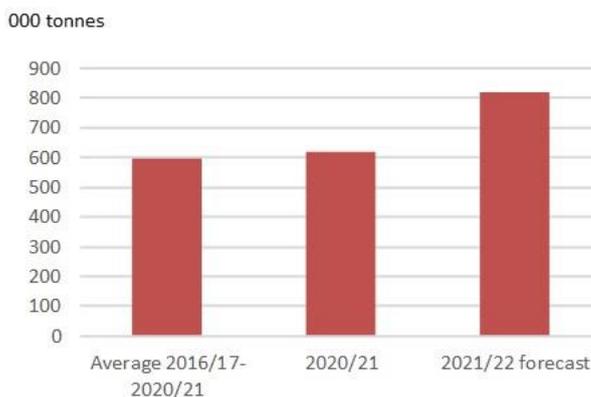
In order to ensure the stability of domestic wheat flour prices amid rising quotations in the export market, on 10 August 2021, the government adopted [Resolution 119](#), providing for the exemption of wheat grain and wheat flour imports from the Value Added Tax (VAT) until 1 August 2022.

Prices of potatoes, another important staple food, increased between September 2020 and June 2021, reaching record high levels as seasonal trends were exacerbated by particularly low domestic availabilities. Prices declined from July to September 2021 with the arrival of the newly harvested tubers to the markets.

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## Kyrgyzstan

### Wheat Imports

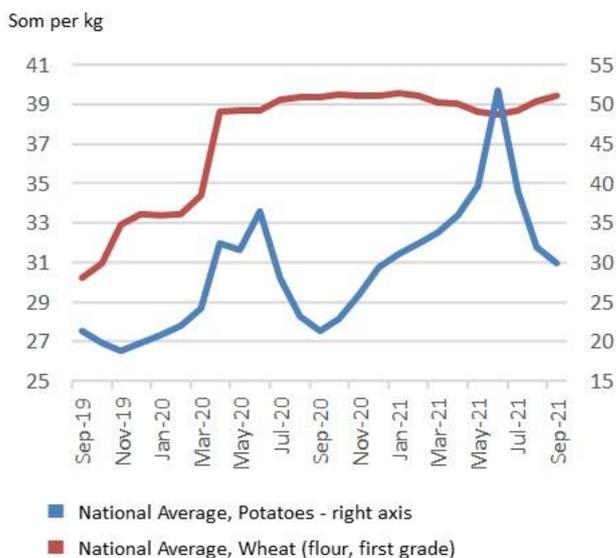


Note: Split year refers to crop marketing year.

Source: FAO/GIEWS Country Cereal Balance Sheets.

## Kyrgyzstan

### Retail potatoes and wheat flour prices



Source: FAO/GIEWS Food Price Monitoring and Analysis Tool.



# GIEWS Country Brief Kyrgyzstan

Reference Date: 12-July-2021

## FOOD SECURITY SNAPSHOT

- Slightly above-average cereal production forecast in 2021
- Wheat import requirements in 2021/22 forecast at near-average level
- Prices of wheat flour remained overall stable at previous year's high levels

## Slightly above-average cereal production forecast in 2021

Harvesting of the 2021 winter cereal crops, mainly wheat and barley, is ongoing, while planting of spring cereals, mainly maize, finalized in June and harvesting is expected to begin in August.

According to satellite-based imagery, cumulative precipitation amounts have been near average since the beginning of the season until May, benefitting yields of winter cereal crops. Below-average precipitation amounts since late May have negatively affected soil moisture levels in the key wheat producing Chui Region in the north as well as in the Talas Region in the northwest, resulting in below-average vegetation conditions as of late June (ASI map). The adverse weather conditions may result in a reduced output of the spring wheat crop in 2021, if rainfall levels do not increase in July and August.

The total 2021 cereal production is forecast at about 1.9 million tonnes, 5 percent above the five-year average level. Maize and barley outputs are forecast at 710 000 tonnes and 500 000 tonnes, respectively, slightly above the five-year average volumes due to large plantings. The output of wheat (winter and spring crops) is forecast at about 620 000 tonnes, near the average level.

## Wheat import requirements in 2021/22 forecast at near-average level

In the 2021/22 marketing year (July/June), wheat import requirements are forecast at 600 000 tonnes, near the average volume. Wheat imports account, on average, for 95 percent of the total annual cereal imports and for almost half of the domestic consumption needs of wheat.

On 16 June 2021, in an effort to ensure adequate domestic availabilities and contain price increases, the Board of the Eurasian Economic Commission introduced a temporary ban on

## Kyrgyzstan

### Crop Calendar

(\*major foodcrop)

Winter cereals (wheat\* and barley)  
Maize (spring)  
Wheat (spring)

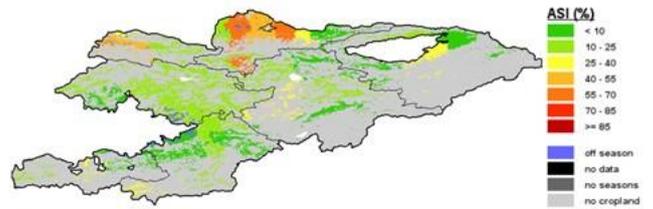


Sowing  
Growing  
Harvesting

Source: FAO/GIEWS.

## Kyrgyzstan - Agricultural Stress Index (ASI)

from start of season 1 to dekad 3, June 2021



Source: FAO/GIEWS Earth Observation System.

## Kyrgyzstan

### Cereal Production

	2016-2020 average	2020	2021 forecast	change 2021/2020
	000 tonnes			percent
Maize	684	714	710	-0.6
Wheat	622	629	620	-1.4
Barley	449	510	500	-2.0
Others	44	48	47	-1.8
<b>Total</b>	<b>1 799</b>	<b>1 902</b>	<b>1 877</b>	<b>-1.3</b>

Note: percentage change calculated from unrounded data.

Source: FAO/GIEWS Country Cereal Balance Sheet.

buckwheat exports from Kyrgyzstan, Armenia and Belarus to countries outside the Eurasian Economic Union (EAEU). The measure will expire on 31 August 2021 ([FPMA Policy](#)). In addition, on 7 July 2021, the Ministry of Agriculture, Water Resources and Regional Development published a [Draft Resolution](#) providing for the cancellation of the Value Added Tax (VAT) on imports of some agricultural products, including cereals, sugar, vegetable oil and meat products. The measure will be in place from 15 July to 31 December 2021.

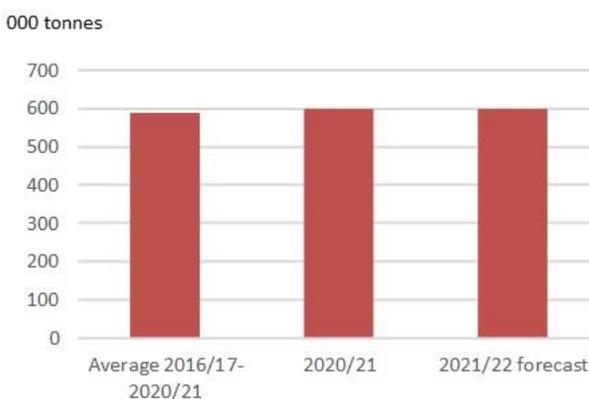
### Prices of wheat flour remained overall stable at previous year's high levels

Retail prices of first grade wheat flour remained relatively stable in most markets during the last 12 months. In June 2021, prices were near the high levels of a year earlier reached after rising in March and April 2020 in response to a spike in consumer demand triggered by the COVID-19 pandemic, but also supported by the depreciation of the national currency.

Prices of potatoes, another important food staple, have been seasonally increasing since September 2020 and, in June 2021, they reached atypically high levels due to particularly low domestic availabilities.

## Kyrgyzstan

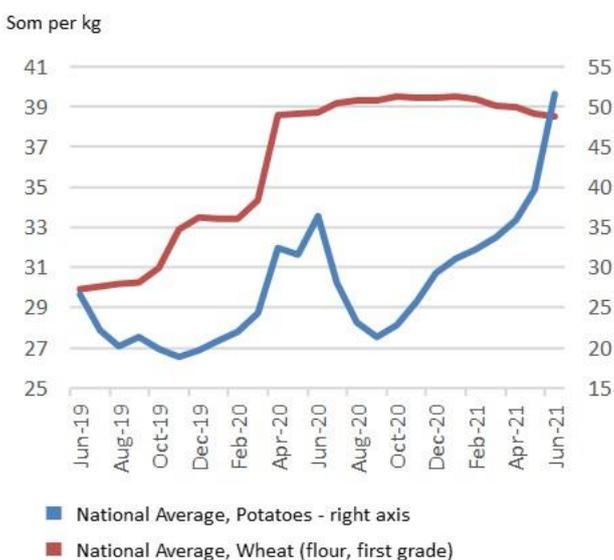
### Wheat Imports



Note: Split year refers to crop marketing year.  
Source: FAO/GIEWS Country Cereal Balance Sheets.

## Kyrgyzstan

### Retail potatoes and wheat flour prices



Source: FAO/GIEWS Food Price Monitoring and Analysis Tool.

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# GIEWS Country Brief Kyrgyzstan

Reference Date: 31-March-2021

## FOOD SECURITY SNAPSHOT

- Favourable weather conditions for 2021 winter crops
- Above-average cereal production obtained in 2020
- Wheat import requirements in 2020/21 forecast near-average level
- Prices of wheat flour remained overall stable in recent months, but higher than year before

## Favourable weather conditions for 2021 winter crops

Planting of the 2021 winter crops, mainly wheat, to be harvested from June, finalized last November under overall favourable weather conditions. According to satellite-based imagery, cumulative precipitation amounts have been near average in most crop lands since the beginning of the season, benefitting soil moisture and improving production prospects.

Planting of the 2021 spring crops, to be harvested from August, just began and is expected to end in June.

## Above-average cereal production obtained in 2020

Harvesting of the 2020 cereal crops finalized last October and the aggregate cereal production is set at about 1.9 million tonnes, 7 percent above the five-year average. Adequate and well-distributed rains during the season were beneficial for wheat crops' yields and, despite slightly below-average plantings, the 2020 wheat output is officially estimated at a near-average level of 629 000 tonnes. Maize and barley outputs are estimated at the above-average levels of about 714 100 and 510 200 tonnes, respectively, mainly due to large planted areas.

## Wheat import requirements in 2020/21 forecast at near-average level

In the 2020/21 marketing year (July/June), wheat import requirements are forecast at 600 000 tonnes, near the average volume. Wheat imports account, on average, for 95 percent of the total annual cereal imports and for almost half of the domestic consumption needs of wheat.

On 19 November 2020, in an effort to ensure adequate domestic food availabilities and contain price increases amid the COVID-19 pandemic, the Government has introduced a new

## Kyrgyzstan

Crop Calendar

(\*major foodcrop)



Sowing  
Growing  
Harvesting

Source: FAO/GIEWS.

## Kyrgyzstan

Cereal Production

	2015-2019 average	2019	2020 estimate	change 2020/2019
	000 tonnes			percent
Maize	670	712	714	0.3
Wheat	637	601	629	4.6
Barley	421	466	510	9.5
Others	41	45	44	-1.1
<b>Total</b>	<b>1 769</b>	<b>1 824</b>	<b>1 898</b>	<b>4.1</b>

Note: percentage change calculated from unrounded data.

Source: FAO/GIEWS Country Cereal Balance Sheet.

six-month ban on exports of some agricultural products, including wheat grain and flour, valid from 8 January 2021. The first six-month export ban was implemented from 23 March to 22 September 2020 ([see FPMA Policy](#)).

### Prices of wheat flour remained overall stable in recent months, but higher than year before

Retail prices of first grade wheat flour were relatively stable in most markets between July 2020 and February 2021, reflecting adequate domestic supplies from the near-average 2020 domestic harvest and following the introduction of bans on wheat exports. However, prices remained well above their values a year before, after the sharp increases recorded in March and April 2020, due to an upsurge in consumer demand amid concerns over the COVID-19 pandemic and export limitations in Kazakhstan, the country's key supplier ([see FPMA Policy](#)). The depreciation of the local currency, which lost over 20 percent of its value against the US dollar since February 2020, also supported the significantly higher year-on-year level of prices.

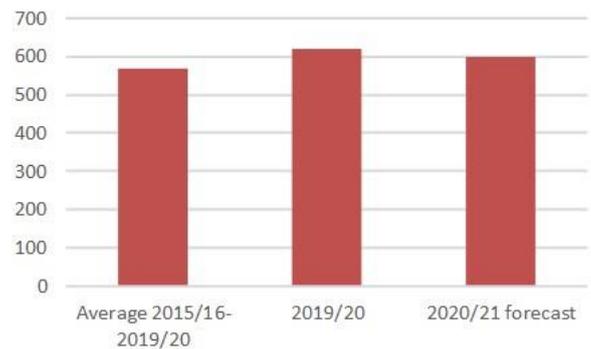
Prices of potatoes, another important food staple, decreased between June and September 2020, with the arrival in the markets of the newly harvested tubers, and started to increase in October, in line with seasonal trends. In February 2021, prices were well above their levels 12 months before due to a reduced harvest.

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## Kyrgyzstan

### Wheat Imports

000 tonnes



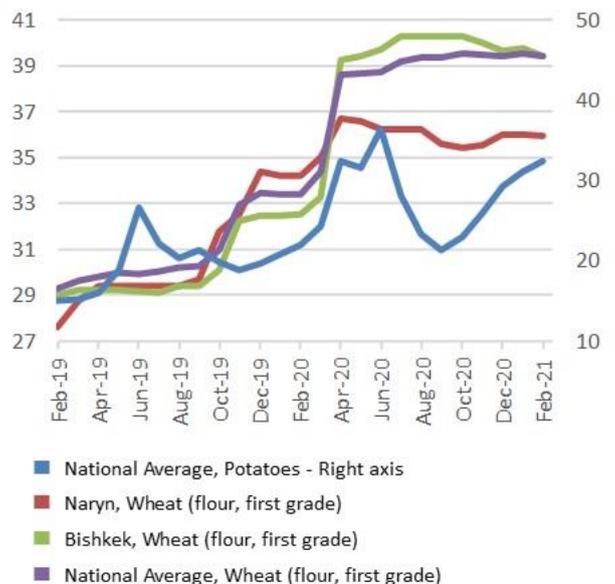
Note: Split year refers to crop marketing year.

Source: FAO/GIEWS Country Cereal Balance Sheets.

## Kyrgyzstan

### Retail potatoes and wheat flour prices

Som per kg



Source: FAO/GIEWS Food Price Monitoring and Analysis Tool.



# GIEWS Country Brief Kyrgyzstan

Reference Date: 05-November-2020

## FOOD SECURITY SNAPSHOT

- Above-average cereal production obtained in 2020
- Wheat import requirements in 2020/21 forecast above-average level
- Prices of wheat flour remained overall stable in recent months, but higher than year before

## Above-average cereal production obtained in 2020

Harvesting of the 2020 winter cereal crops finalized in August, while harvesting of the spring crops was completed in October. The aggregate cereal production in 2020 is set at 1.95 million tonnes, 8 percent above the five-year average. Adequate and well-distributed rains during the season were beneficial for wheat crops' yields and the 2020 wheat output is officially estimated at 670 300 tonnes, 5 percent above the five-year average. Maize and barley outputs are estimated at above-average levels of 693 600 and 550 400 tonnes, respectively, mainly due to large plantings.

Planting of the 2021 winter wheat crop, to be harvested from June next year, is ongoing under overall favourable weather conditions.

## Wheat import requirements in 2020/21 forecast above-average level

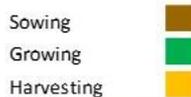
In the 2020/21 marketing year (July/June), wheat import requirements are forecast at 620 000 tonnes, about 10 percent above the average volume in order to compensate for the below-average domestic output. Wheat imports account, on average, for 95 percent of the total annual cereal imports and for almost half of the domestic consumption needs of wheat.

In an effort to ensure adequate availabilities of wheat and counter over pricing amid the COVID-19 pandemic, the Government implemented a number of measures, such as the imposition, on 23 March 2020, of a [ban on exports](#) of a range of products (including wheat grain and flour) until 22 September 2020. A new ban on exports of selected products is currently under discussion.

## Kyrgyzstan

Crop Calendar

(\*major foodcrop)



Source: FAO/GIEWS.

## Kyrgyzstan

Cereal Production

	2015-2019 average	2019	2020 estimate	change 2020/2019
	000 tonnes			percent
Maize	670	712	694	-2.5
Wheat	637	601	670	11.4
Barley	421	466	550	18.1
Others	41	31	32	3.2
<b>Total</b>	<b>1 769</b>	<b>1 810</b>	<b>1 946</b>	<b>7.5</b>

Note: percentage change calculated from unrounded data.

Source: FAO/GIEWS Country Cereal Balance Sheet.

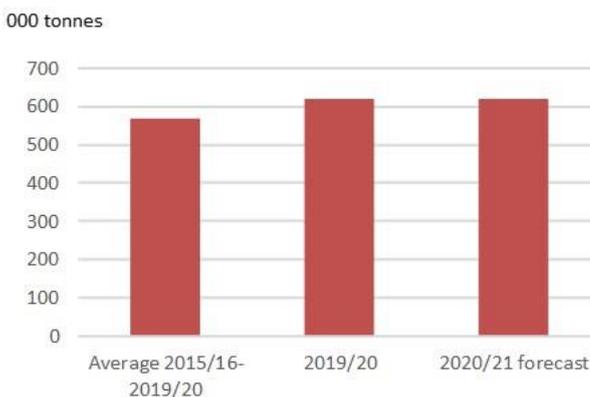
## Prices of wheat flour remained overall stable in recent months, but higher than year before

Retail prices of first grade wheat flour remained relatively stable in most markets between July and October 2020 amid adequate domestic supplies from the recent harvest. However, prices remained well above their values a year before, after the sharp increases recorded in March and April 2020, following an upsurge in consumer demand due to concerns over the COVID-19 pandemic and [export limitations in Kazakhstan](#), the country's key supplier.

Prices of potatoes, another important food staple, seasonally decreased between June and September 2020 with the arrival to the markets of the recently harvested tubers, and slightly increased in October.

## Kyrgyzstan

### Wheat Imports

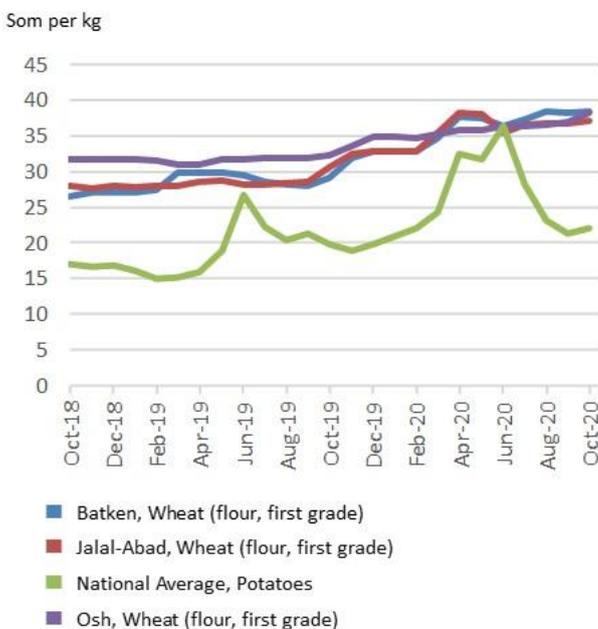


Note: Split year refers to crop marketing year.

Source: FAO/GIEWS Country Cereal Balance Sheets.

## Kyrgyzstan

### Retail potatoes and wheat flour prices



Source: FAO/GIEWS Food Price Monitoring and Analysis Tool.

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# GIEWS Country Brief Kyrgyzstan

Reference Date: 06-August-2020

### FOOD SECURITY SNAPSHOT

- **Wheat output forecast to increase slightly in 2020 but still below average**
- **Wheat import requirements in 2020/21 forecast above average**
- **Prices of wheat flour declined between May and July with beginning of 2020 winter wheat harvest**

## Wheat output forecast to increase slightly in 2020 but still below average

Harvesting of the 2020 winter wheat crops, planted in October and November last year, is ongoing under favourable weather conditions. Adequate and well-distributed rains during the season were beneficial for crops across the country, avoiding any significant moisture stress, as shown by the Agricultural Stress Index (ASI) values as of late May, just before the beginning of the harvest (see ASI image). The aggregate 2020 wheat output is officially forecast slightly up from the reduced level of the previous year, at 618 700 tonnes, but still below the five-year average due to below-average plantings.

Maize and barley outputs, by contrast, to be harvested from August, are expected at above-average levels of 680 000 and 465 000 tonnes, respectively, mainly due to larger-than-average planted areas.

## Wheat import requirements in 2020/21 forecast above-average level

In the 2020/21 marketing year (July/June) wheat import requirements are forecast at 620 000 tonnes, about 10 percent above the average volume in order to compensate for the expected reduced domestic output. Wheat imports account on average for 95 percent of the total annual cereal imports and for almost half of the domestic consumption needs of wheat.

In response to the COVID-19 pandemic, the State Material Reserves Fund agreed with the Food Corporation of the Russian Federation on the acquisition of 33 000 tonnes of wheat, with the aim to boost domestic reserves. In addition, the Government of Kazakhstan and the Government of Uzbekistan provided 5 000 and 1 000 tonnes of wheat flour, respectively, to the country as food aid.

Furthermore, the Ministry of Agriculture, Food Industry and Melioration issued a Decree for the development of a National

## Kyrgyzstan

Crop Calendar

(\*major foodcrop)

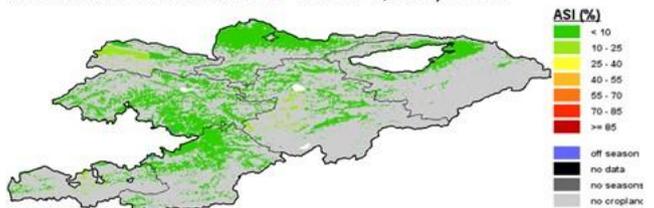


Sowing  
Growing  
Harvesting

Source: FAO/GIEWS.

## Kyrgyzstan - Agricultural Stress Index (ASI)

from start of season 1 to dekad 3, May 2020



Source: FAO/GIEWS Earth Observation System.

## Kyrgyzstan

### Cereal Production

	2015-2019 average	2019	2020 forecast	change 2020/2019
	000 tonnes			percent
Maize	670	712	680	-4.5
Wheat	637	601	619	2.9
Barley	421	466	465	-0.2
Others	41	45	45	0.0
<b>Total</b>	<b>1 769</b>	<b>1 824</b>	<b>1 808</b>	<b>-0.8</b>

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

Programme on import substitution to ensure food security and reduce the country's dependency on food imports.

## Prices of wheat flour declined between May and July with beginning of 2020 winter wheat harvest

Retail prices of wheat flour increased between February and April 2020 due to an upsurge in consumer demand from mid-March, amid concerns over the COVID-19 pandemic and [export limitations imposed by the Government of Kazakhstan](#), the main wheat supplier to the country. The depreciation of the local currency, which lost more than 10 percent of its value against the US dollar between February and April, provided further upward pressure on prices. Prices decreased between May and July, amid the beginning of the 2020 winter wheat harvest, but they remained over 20 percent above their levels a year earlier, reflecting higher export quotations, year on year, from Kazakhstan and the expectation of a reduced output in 2020.

Prices of potatoes, another important food staple, seasonally increased between November 2019 and June 2020. Prices increased particularly in March and April, reaching levels twice as high as twelve months earlier, due to strong demand from consumers, fearing supply shortages as a result of the pandemic, which exacerbated seasonal trends. Prices of potatoes decreased in July with the arrival to the markets of the recently harvested 2020 tubers.

In response to the COVID-19 pandemic and in an effort to counter over pricing, the Government implemented a number of measures. These measures include:

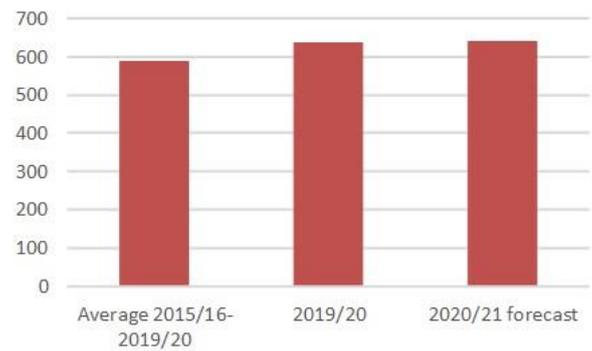
- The provision of loans with low interest rates to support the sectors of the economy and business entities for KGS 40 billion by the end of 2021.
- The introduction, on 16 March 2020, of temporary ceilings on prices of wheat flour.
- The imposition of a six-month [ban on exports](#) of a range of products (wheat grain and flour, rice, vegetable oils and sugar).
- On 15 April 2020, the [exemption from VAT](#) on imported wheat flour and wheat grain for processing until 1 January 2025.

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## Kyrgyzstan

### Cereals Imports

000 tonnes



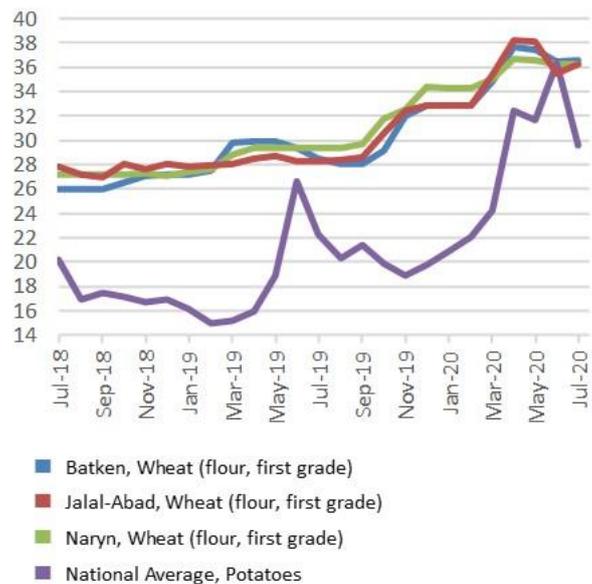
Note: Includes rice in milled terms. Split year refers to individual crop marketing years (for rice, calendar year of second year shown).

Source: FAO/GIEWS Country Cereal Balance Sheets.

## Kyrgyzstan

### Retail potatoes and wheat flour prices

Som per kg



Source: FAO/GIEWS Food Price Monitoring and Analysis Tool.



## GIEWS Country Brief Kyrgyzstan

Reference Date: 20-May-2020

### FOOD SECURITY SNAPSHOT

- Favourable production prospects for 2020 winter wheat crops
- Bumper cereal output obtained in 2019
- Wheat import requirements in 2019/20 forecast above average level
- Prices of wheat flour and potatoes increased in March and April amid strong demand due to COVID-19 concerns

### Favourable production prospects for 2020 winter wheat crops

Harvesting of the 2020 winter wheat crop is expected to begin in June and, according to satellite-based imagery, conditions of crops in early May were favourable across the country (see ASI map).

Planting of the 2020 maize and spring wheat crops is ongoing under favourable weather conditions and harvesting will start in August and September, respectively.

### Bumper cereal output obtained in 2019

Harvesting of the 2019 cereal crops finalized last October and the total cereal output is estimated at 1.8 million tonnes, 7 percent above the five-year average and the second highest outcome of the last ten years. The result is due to well above-average maize and barley outputs, officially estimated at 712 000 and 466 000 tonnes, respectively, mainly due to large plantings. By contrast, the 2019 production of wheat, following a progressive reduction in the area planted, is set at 601 000 tonnes, 7 percent below the average level.

### Wheat import requirements in 2019/20 forecast above average level

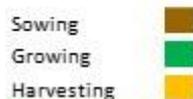
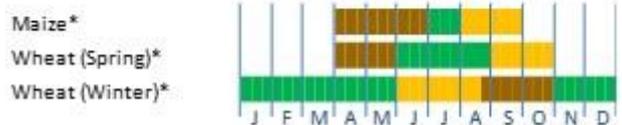
In the 2019/20 marketing year (July/June), wheat import requirements, accounting on average for 95 percent of the total annual cereal purchases and for almost half of the domestic consumption needs of wheat, are forecast at 620 000 tonnes, about 10 percent above the average volume in order to compensate for the reduced domestic output.

In response to the COVID-19 pandemic (see box below), the State Material Reserves Fund signed an agreement with the Food Corporation of the Russian Federation for the acquisition of

### Kyrgyzstan

Crop Calendar

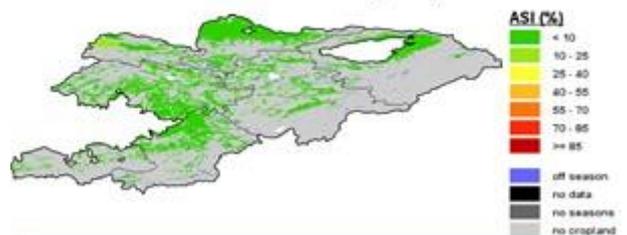
(\*major foodcrop)



Source: FAO/GIEWS.

### Kyrgyzstan - Agricultural Stress index (ASI)

from start of season 1 to dekad 1, May 2020



Source: FAO/GIEWS Earth Observation System.

### Kyrgyzstan

#### Cereal Production

	2014-2018 average	2018	2019 estimate	change 2019/2018
	000 tonnes			percent
Maize	639	693	712	2.7
Wheat	631	616	601	-2.4
Barley	367	429	466	8.5
Others	38	45	45	-0.9
<b>Total</b>	<b>1 675</b>	<b>1 783</b>	<b>1 824</b>	<b>2.3</b>

Note: percentage change calculated from unrounded data.

Source: FAO/GIEWS Country Cereal Balance Sheet.

33 000 tonnes of wheat, to be delivered through May 2020, with the aim to boost domestic reserves. In addition, the Government of Kazakhstan has provided 5 000 tonnes of wheat flour to the country as food aid.

## Prices of wheat flour and potatoes increased in March and April amid strong demand due to COVID-19 concerns

Retail prices of wheat flour increased between October and December 2019, remained stable in the first two months of 2020 and steeply rose again in March and April. The recent increases stem from an upsurge in consumer demand from mid-March, amid concerns over the COVID-19 pandemic and [export limitations imposed by the Government of Kazakhstan](#), the main wheat supplier to the country. The depreciation of the local currency, which lost more than 10 percent of its value against the US dollar between February and April, provided further upward pressure on prices. In April, wheat prices were well above their year-earlier levels, reflecting year on year higher export quotations from Kazakhstan and a decrease in the 2019 domestic harvest.

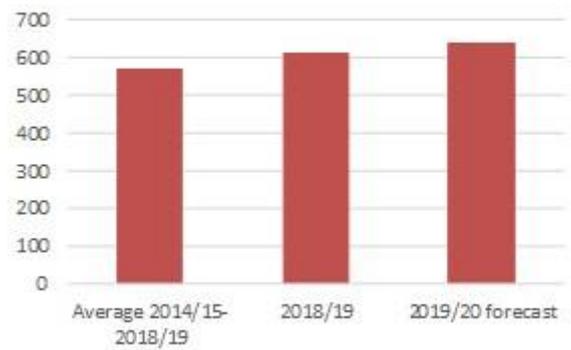
Prices of potatoes, another important food staple, seasonally increased between November 2019 and April 2020. Prices increased particularly in March and April, reaching levels twice as high as twelve months earlier, due to strong demand from consumers, fearing supply shortages as a result of the pandemic, which exacerbated seasonal trends.

In response to the COVID-19 pandemic (see box below) and in an effort to counter over pricing, the Government implemented a number of measures. These measures include the introduction, on 16 March 2020, of temporary ceilings on prices of food items (wheat flour), the imposition of a six-month [ban on exports](#) of a range of products (wheat grain, wheat flour, rice, vegetable oils and sugar) and the [exemption from VAT](#), on 15 April 2020, of imported wheat flour and wheat grain for processing until 1 January 2025.

## Kyrgyzstan

### Cereals Imports

000 tonnes



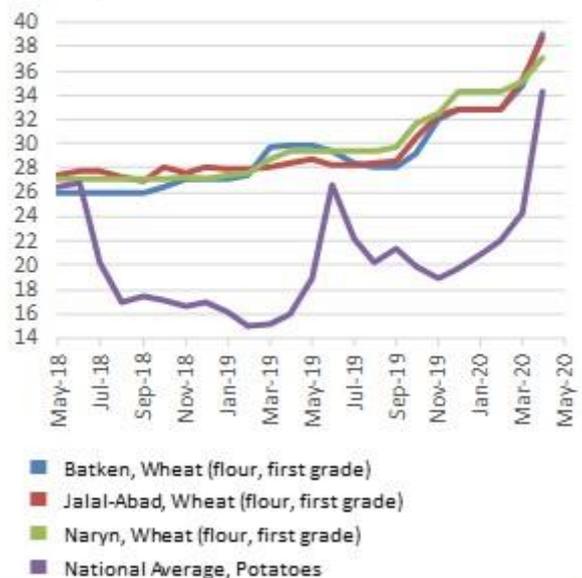
Note: Includes rice in milled terms. Split year refers to individual crop marketing years (for rice, calendar year of second year shown).

Source: FAO/GIEWS Country Cereal Balance Sheets.

## Kyrgyzstan

### Retail potatoes and wheat flour prices

Som per kg



Source: FAO/GIEWS Food Price Monitoring and Analysis Tool.

## COVID-19 and measures adopted by the Government

In response to the COVID-19 pandemic, thermal scans were installed on 22 January 2020 at all checkpoints on the border with China and at Manas international airport. Information on preventive measures was provided from 4 February 2020 in various education institutions and borders were closed on 17 March 2020.

On 23 March 2020, the State of Emergency was declared, imposing a partial lockdown, curfew and quarantine measures.

The Government initiated a number of policy measures aimed at mitigating the negative impact of COVID-19 on the economy as well as to meet food security, agriculture and livelihood needs of the affected population. These measures include an action plan on the provision of economic and social stabilization for 2020 and a joint plan on food security and nutrition. In addition, the Disaster Response Coordination Unit (DRCU) Council provides support in six priority sectors: early recovery, food security and logistics, health, protection, water sanitation and hygiene (WASH) and non-food items (NFI).

Furthermore, the Ministry of Agriculture, Food Industry and Melioration issued a Decree for the development of a National Programme on import substitution to ensure food security and reduce the country's dependency on food imports.

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## GIEWS Country Brief Kyrgyzstan

Reference Date: 18-October-2019

### FOOD SECURITY SNAPSHOT

- Above-average cereal output forecast in 2019
- Wheat import requirements forecast above average in 2019/20
- Prices of wheat flour remained stable over last two years

### Above-average cereal output forecast in 2019

Harvesting of the 2019 winter wheat and maize finalized by mid-August and end-September, respectively, while harvesting of spring wheat is ongoing under favourable weather conditions.

The total 2019 cereal production (which includes spring wheat crops to be harvested until end-October) is forecast at 1.8 million tonnes, 5 percent above the five-year average. The result is due to well above-average maize and barley outputs, estimated at 690 000 and 440 000 tonnes, respectively, mainly due to increased plantings. By contrast, the 2019 aggregate production of wheat (winter and spring crops), following a progressive reduction in the area planted, is forecast at 590 000 tonnes, 4 percent below the 2018 output and 7 percent below the average.

Sowing of the 2020 winter wheat crops, to be harvested between June and August next year, is ongoing under favourable weather conditions and will be completed in late October/early November.

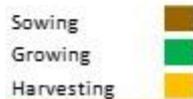
### Wheat import requirements forecast above average in 2019/20

In the 2019/20 marketing year (July/June), wheat flour and wheat grain import requirements, accounting on average for 95 percent of the total annual cereals purchases, are forecast at 620 000 tonnes, 8 percent above the volume of the previous year and about 10 percent above the average in order to compensate the expected reduced domestic output.

Imports account for almost half of the domestic consumption needs of wheat and shipments are mainly from Kazakhstan, although the share of imports from the Russian Federation has been increasing over the last years.

### Kyrgyzstan

Crop Calendar (\*major foodcrop)



Source: FAO/GIEWS.

### Kyrgyzstan

#### Cereal Production

	2014-2018	2018	2019	change
	average			2019/2018
000 tonnes				
				percent
Maize	639	693	690	-0.4
Wheat	631	616	590	-4.2
Barley	367	429	440	2.5
Others	38	45	46	2.8
<b>Total</b>	<b>1 675</b>	<b>1 783</b>	<b>1 766</b>	<b>-0.9</b>

Note: percentage change calculated from unrounded data.

Source: FAO/GIEWS Country Cereal Balance Sheet.

## Prices of wheat flour remained stable over last two years

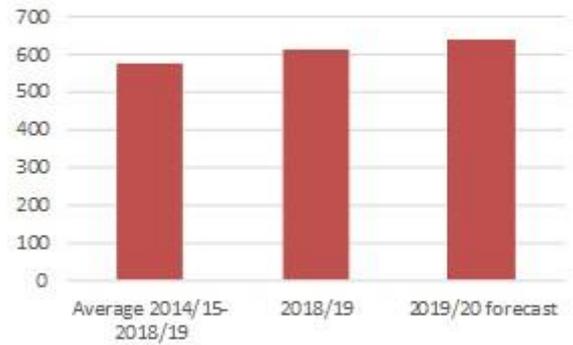
Retail prices of wheat flour remained generally stable or increased moderately in the last two years in most markets. In September 2019, wheat flour prices were slightly higher than in the corresponding month of the previous year mainly as a result of year on year higher export quotations from Kazakhstan and a decrease in the 2019 domestic harvest.

Prices of potatoes, another important staple, seasonally decreased in July and August 2019 and increased in September, to year-on-year higher levels.

## Kyrgyzstan

### Cereals Imports

000 tonnes



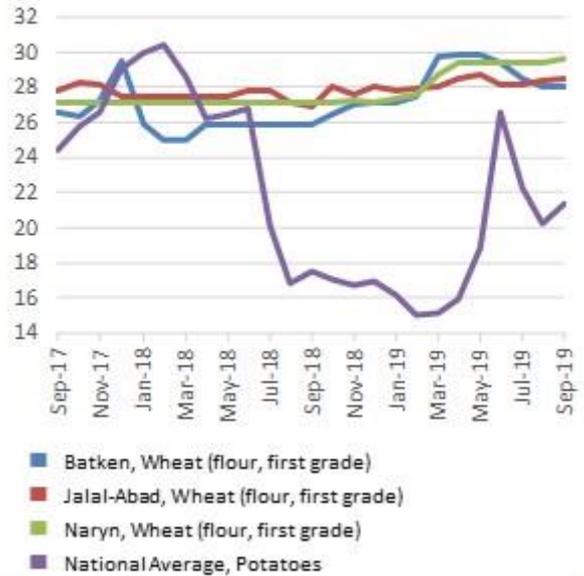
Note: Includes rice in milled terms. Split year refers to individual crop marketing years (for rice, calendar year of second year shown).

Source: FAO/GIEWS Country Cereal Balance Sheets.

## Kyrgyzstan

### Retail potatoes and wheat flour prices

Som per kg



Source: FAO/GIEWS Food Price Monitoring and Analysis Tool.

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# GIEWS Country Brief Kyrgyzstan

Reference Date: 29-March-2019

## FOOD SECURITY SNAPSHOT

- Winter crops for harvest in 2019 about to resume growth
- Bumper cereal output obtained in 2018
- Cereal import requirements in 2018/19 (July/June) expected at near-average level
- Prices of wheat flour remained stable over last months

## Winter crops for harvest in 2019 about to resume growth

Conditions of 2019 winter crops, to be harvested between June and August, are reported to be favourable. Sufficient snow cover, necessary to protect crops from freezing during the dormancy period, was present on most crop fields since late October 2018. As of early March, snow had almost entirely melted and plant growth is expected to resume in April. The area sown with 2019 winter cereals, mostly wheat, is estimated at 154 000 hectares, close to last year's average level.

Sowing of 2019 spring crops, to be harvested between August and October, is expected to start in April.

On 2 February 2019, a presidential decree announced that the cost of seeds for a number of food crops, including cereals, will be subsidized. The subsidy intends to half the cost of seed purchases incurred by farmers by reducing the price of seeds from an average of KGS 25 per kg (USD 0.4) to KGS 12.5 per kg (USD 0.2). Approximately KGS 107 million (USD 1.5 million) have been allocated to the seed subsidy programme which is expected to boost plantings.

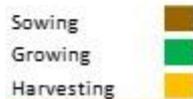
## Bumper cereal output obtained in 2018

Aggregate cereal production in 2018 is estimated at 1.78 million tonnes, 7 percent above the five-year average and the nine-year high. The result is mainly on account of record maize and barley outputs, officially estimated at 692 900 and 429 300 tonnes, respectively, mainly due to increased plantings. By contrast, production of wheat, following a progressive reduction in the area planted, is estimated 8 percent below the average, at 615 900 tonnes.

## Kyrgyzstan

Crop Calendar

(\*major foodcrop)



Source: FAO/GIEWS.

## Kyrgyzstan

### Cereal Production

	2013-2017	2017	2018	change
	average			2018/2017
000 tonnes				
				percent
Wheat	672	601	616	2.5
Maize	614	653	693	6.0
Barley	343	424	429	1.2
Others	35	42	45	7.0
<b>Total</b>	<b>1 664</b>	<b>1 721</b>	<b>1 783</b>	<b>3.6</b>

Note: percentage change calculated from unrounded data.

Source: FAO/GIEWS Country Cereal Balance Sheet.

## Cereal import requirements in 2018/19 expected at near-average level

In the 2018/19 marketing year (July/June), total cereal import requirements, mostly wheat, are forecast at 588 000 tonnes, near the five-year average level. Wheat imports account for almost half of the total domestic consumption needs and are shipped mainly from Kazakhstan, although the share of imports from the Russian Federation has been increasing over the last years.

## Prices of wheat flour remained stable over last months

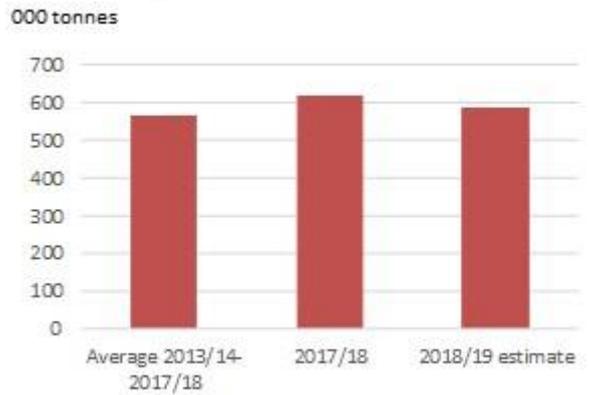
Retail prices of wheat flour remained generally stable in most markets over the last months and, in February 2019, prices were close to their values in the corresponding month of the previous year as a result of adequate supplies from the above-average output of 2018.

Prices of potatoes, another important staple, have been decreasing since December 2018 and, in February 2019, they were significantly lower than their year-earlier levels, mainly due to an increased harvest in 2018.

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## Kyrgyzstan

### Cereals Imports

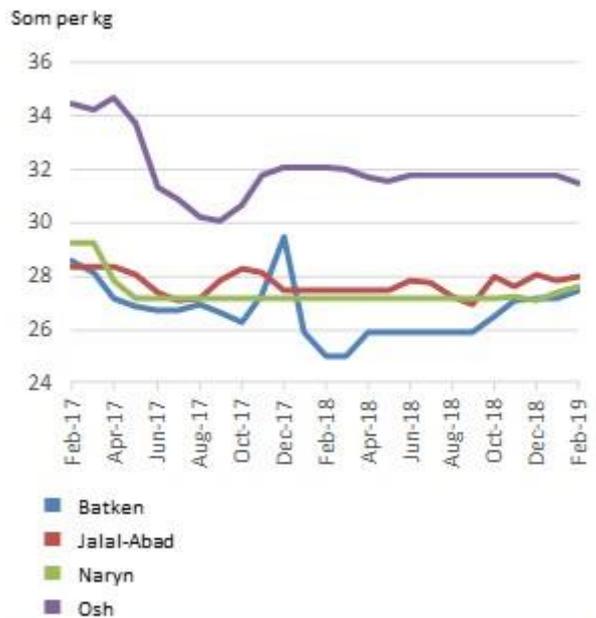


Note: Includes rice in milled terms. Split year refers to individual crop marketing years (for rice, calendar year of second year shown).

Source: FAO/GIEWS Country Cereal Balance Sheets.

## Kyrgyzstan

### Retail wheat flour prices



Source: FAO/GIEWS Food Price Monitoring and Analysis Tool.



# GIEWS Country Brief Kyrgyzstan

Reference Date: 18-December-2018

## FOOD SECURITY SNAPSHOT

- Area sown with 2019 winter crops estimated at average level
- Cereal output in 2018 estimated above average level
- Wheat import requirements in 2018/19 (July/June) forecast near average
- Prices of wheat flour remained stable over last nine months

## Area sown with 2019 winter crops estimated at average level

Sowing of winter cereals, to be harvested between June and August 2019, virtually finalized by mid-October under favourable weather conditions. The area sown under winter cereals, mostly wheat, is estimated at 154 000 hectares, close to last year's average level.

Starting from late October, seasonal snowfalls were observed across the country and, as of mid-December, all winter plantings were covered by snow, necessary to protect crops from freezing during the dormancy period.

## Cereal output in 2018 estimated above average level

Harvesting of 2018 spring crops, which were planted between April and June, finalized by the end of October under favourable weather conditions. Soil moisture was adequate across the country throughout the season due to average precipitation amounts and ample availability of water for irrigation.

Total cereal production in 2018, including winter and spring crops, is estimated at 1.76 million tonnes, 12 percent above the five-year average and nearly unchanged from last year's high level. Barley output is set at a well above average level of 455 000 tonnes, although slightly below the previous year's level. On the contrary, following the progressive reduction in area planted, wheat output is set at 670 000 tonnes, 10 percent below the average level. Maize production is estimated close to average, at 592 000 tonnes, slightly more than in 2017.

## Wheat import requirements in 2018/19 forecast near average

Total cereal import requirements, mostly wheat, in the 2018/19 marketing year (July/June) are forecast at 595 000 tonnes.

## Kyrgyzstan

Crop Calendar

(\*major foodcrop)



Sowing  
Growing  
Harvesting

Source: FAO/GIEWS.

## Kyrgyzstan

### Cereal Production

	2013-2017 average	2017	2018 estimate	change 2018/2017
	000 tonnes			percent
Wheat	685	665	670	0.7
Maize	599	578	592	2.4
Barley	353	472	455	-3.6
Others	35	38	38	0.0
<b>Total</b>	<b>1 671</b>	<b>1 753</b>	<b>1 755</b>	<b>0.1</b>

Note: percentage change calculated from unrounded data.

Source: FAO/GIEWS Country Cereal Balance Sheet.

Wheat imports, which account for about half of the total domestic consumption needs, are expected at 570 000 tonnes, just below last year's level and close to the five-year average.

Most of the wheat grains and flour are imported from Kazakhstan, although the share of imports from the Russian Federation has been increasing over the last years.

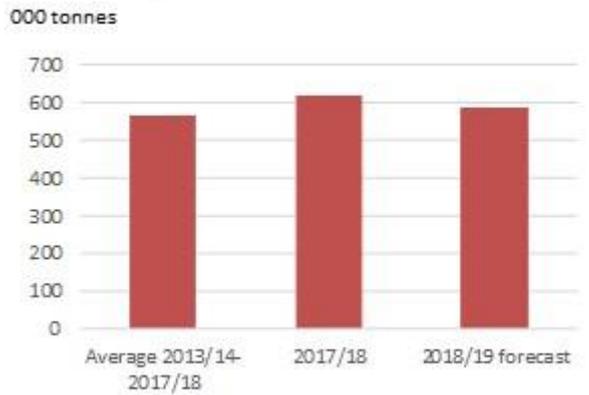
### Prices of wheat flour remained stable over last nine months

Retail prices of wheat flour remained generally stable in most markets over the last nine months and, in November, they were close to their values of a year earlier, reflecting adequate domestic availability and a relatively stable local currency.

Prices of potatoes, another important staple, have been decreasing since September and, in November, they were significantly lower than their year-earlier levels, mainly due to an increase of output in 2018.

## Kyrgyzstan

### Cereals Imports

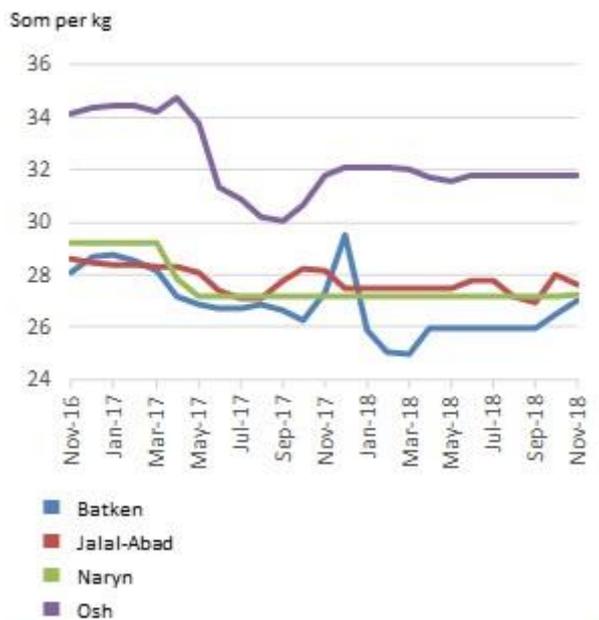


Note: Includes rice in milled terms. Split year refers to individual crop marketing years (for rice, calendar year of second year shown).

Source: FAO/GIEWS Country Cereal Balance Sheets.

## Kyrgyzstan

### Retail wheat flour prices



Source: FAO/GIEWS Food Price Monitoring and Analysis Tool.

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# GIEWS Country Brief Kyrgyzstan

Reference Date: 31-July-2018

## FOOD SECURITY SNAPSHOT

- Cereal output in 2018 forecast at average levels
- Wheat imports in 2018/19 (July/June) expected to remain unchanged from previous year
- Prices of wheat flour stable over last six months

## Cereal output in 2018 forecast at average levels

Harvesting of winter cereals, which were planted in September-October 2017, started in early June. During the growing season, weather conditions were favourable for crop development. However, excessive precipitations at the end of May, just before the start of the harvest, had a negative impact on yields.

Overall conditions of spring cereals, to be harvested by September, are good (see ASI map), reflecting adequate precipitation amounts and availability of irrigation.

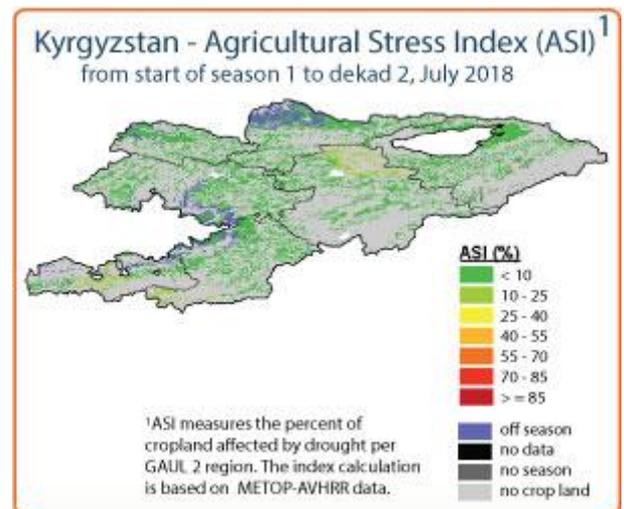
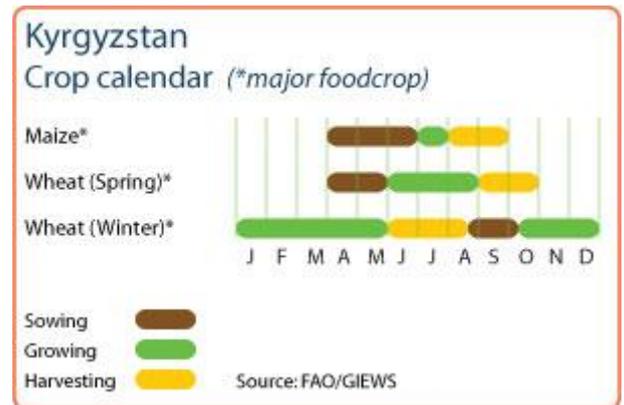
Considering a slight reduction in winter yields, FAO forecasts the total 2018 cereal production at 1.7 million tonnes, about 3 percent below the previous year and very close to the five-year average.

## Wheat imports in 2018/19 expected to remain unchanged from previous year

Wheat imports account for about half of the total domestic consumption needs. Wheat imports in the 2018/19 marketing year (July/June) are forecast at 600 000 tonnes, nearly unchanged from the previous year's level. The bulk of wheat grains and flour is imported from Kazakhstan, although the share of imports from the Russian Federation has been increasing over the past years.

## Prices of wheat flour stable over last six months

The average price of wheat flour was relatively stable over the last six months and, in July, it was very close to its year-earlier level reflecting stable domestic production in 2017 and stable export prices from Kazakhstan. To ensure cheap import flows in the country, the Government lifted the import tariffs on wheat flour in December last year.



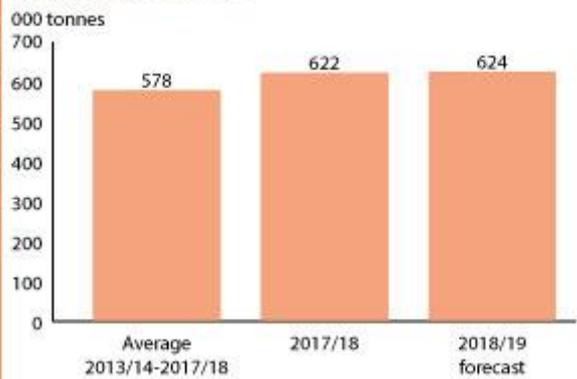
**Kyrgyzstan**  
Cereal production

	2013-2017 average	2017	2018 forecast	change 2018/2017
	000 tonnes			percent
Wheat	685	665	650	-2
Maize	599	578	570	-1
Barley	353	472	440	-7
Others	35	38	38	0
<b>Total</b>	<b>1 671</b>	<b>1 753</b>	<b>1 698</b>	<b>-3</b>

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

## Kyrgyzstan

### Total cereal imports

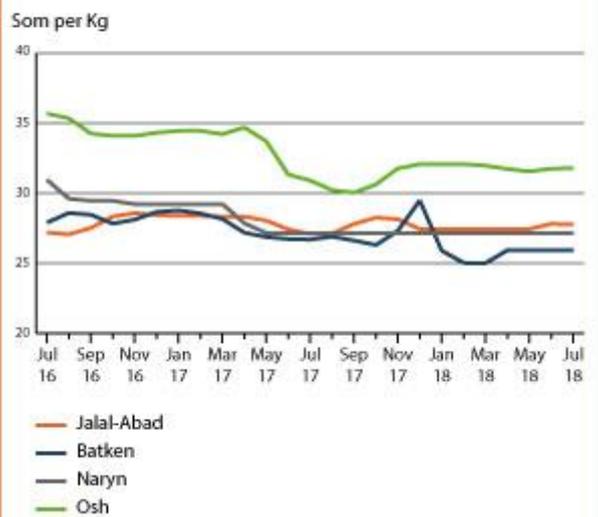


Notes: Total cereal includes rice in milled terms. Split year refers to individual crop marketing years.

Source: FAO/GIEWS Country Cereal Balance Sheets

## Kyrgyzstan

### Retail wheat flour prices



Source: National Statistical Committee of the Kyrgyz Republic

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# GIIEWS Country Brief Kyrgyzstan

Reference Date: 03-July-2017

## FOOD SECURITY SNAPSHOT

- Cereal output in 2017 forecast at average level
- Cereal imports in 2017/18 marketing year (July/June) forecast to increase
- Wheat flour prices stable over last six months

### Cereal output in 2017 forecast at average level

Harvesting of winter cereals started in early June. The area planted under winter cereals is estimated at 146 000 hectares, slightly below the previous year. Farmers are switching to export-oriented products such as rice, sugar beet, cotton, beans and tobacco as well as to fodder crops, while planted areas under less profitable wheat and oil crops has decreased over the past years.

Overall conditions of spring cereals, to be harvested by September, are good (see ASI map), reflecting adequate precipitations and availability of irrigation. The Ministry of Agriculture allocated around KGS 250 million (USD 3.6 million) for maintenance of the State irrigation systems in 2017.

Considering the slight reduction in planted area, FAO early forecasts cereal production in 2017 at 1.6 million tonnes, about 6 percent below the previous years and very close to the five-year average level.

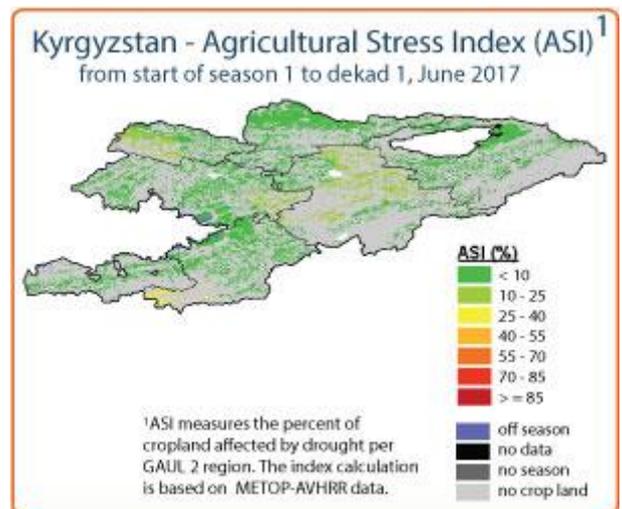
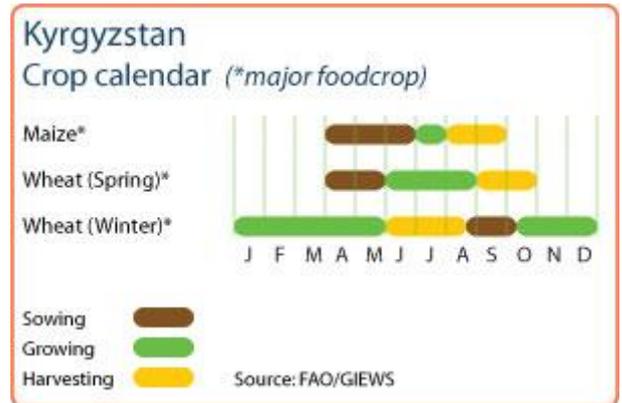
### Cereal imports in 2017/18 marketing year forecast to increase

The country depends heavily on cereal imports to meet its consumption needs, with wheat accounting for about 98 percent of the total cereal imports. Wheat imports in the 2017/18 marketing year (July/June) are forecast at 600 000 tonnes, nearly 10 percent up from the previous year's level, following the expected reduction in local production.

The bulk of the wheat and wheat flour originates from Kazakhstan, although the share of imports from the Russian Federation has been increasing over the past years.

### Wheat flour prices stable over last six months

The average price of wheat flour was relatively stable over the last six months and, in early June, it was 5 percent below its year-earlier level reflecting good domestic supplies (local



**Kyrgyzstan**  
Cereal production

	2012-2016 average	2016	2017 forecast	change 2017/2016
	000 tonnes			percent
Wheat	668	654	644	-2
Maize	564	550	577	5
Barley	310	443	325	-27
Others	31	33	34	3
<b>Total</b>	<b>1,573</b>	<b>1,680</b>	<b>1,580</b>	<b>-6</b>

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

production plus imports), declining export prices from Kazakhstan and the Government's decision to lift the VAT on imported wheat flour in January 2016.



*Disclaimer: The designations employed and the presentation of material in this information product do not imply the expression of any opinion whatsoever on the part of FAO concerning the legal status of any country, territory, city or area or of its authorities, or concerning the delimitation of its frontiers or boundaries.*



## GLEWS Country Brief Kyrgyzstan

Reference Date: 18-May-2017

### FOOD SECURITY SNAPSHOT

- Prospects for 2017 crops generally favourable
- Cereal imports in 2017/18 marketing year (July/June) forecast to increase
- Wheat flour prices stable over last six months

### Prospects for 2017 cereal crops favourable

Sowing of winter crops was completed in October 2016. The planted area under cereals is estimated at 146 000 hectares, slightly below the previous year. Farmers are switching to export-oriented products such as rice, sugar beet, cotton, beans and tobacco as well as to fodder crops, while planted areas under less profitable wheat and oil crops has decreased over the past years. Overall conditions of the winter cereals are good, with only 3.6 percent of the planted area reported to be in poor conditions (see ASI map). Planting of the 2017 spring cereals started in April under favourable weather conditions.

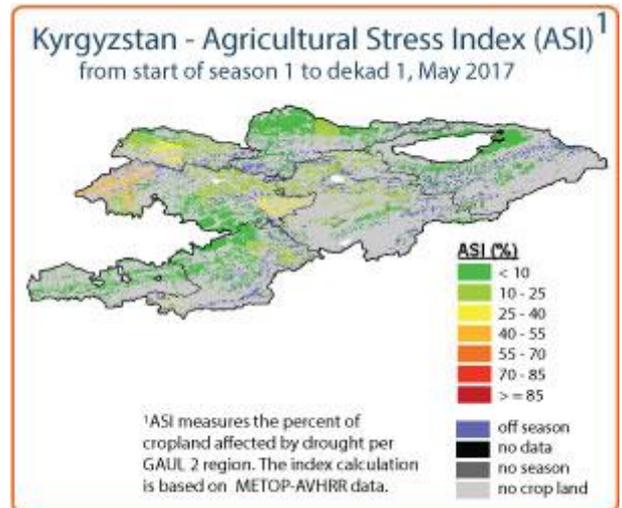
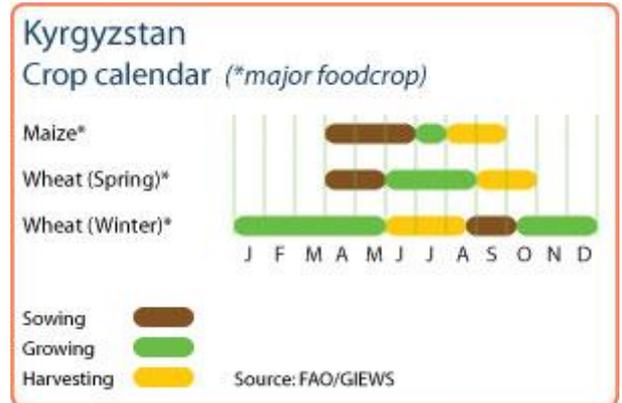
As most of the crops are irrigated, the Ministry of Agriculture allocated around KGS 250 million (USD 3.6 million) for state irrigation systems in 2017. The Government has reported shortages of fertilizers in the country, which are planned to be bought from Uzbekistan.

Considering the reduction in the planted area, FAO's early forecast points to 6 percent decline in total cereal production, which is set at 1.6 million tonnes in 2017.

### Cereal imports in 2017/18 marketing year forecast to increase

The country depends heavily on cereal imports to meet its consumption needs, with wheat accounting for about 98 percent of the total cereal imports. Wheat imports in the 2017/18 marketing year (July/June) are forecast at 600 000 tonnes, nearly 10 percent up from the previous year's level, following the reduction in local production.

The bulk of the wheat and wheat flour originates from Kazakhstan, although the share of imports from the Russian Federation has been increasing over the past years.



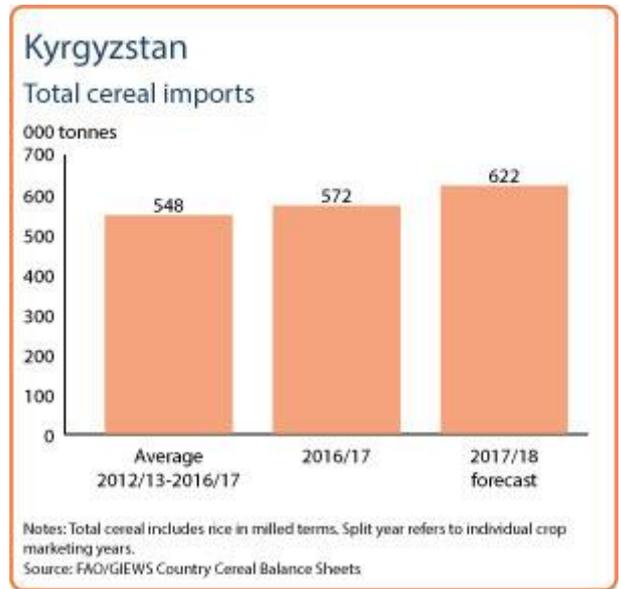
**Kyrgyzstan**  
Cereal production

	2012-2016 average	2016	2017 forecast	change 2017/2016
	000 tonnes		percent	
Wheat	668	654	644	-2
Maize	564	550	577	5
Barley	310	443	325	-27
Others	31	33	34	3
<b>Total</b>	<b>1,573</b>	<b>1,680</b>	<b>1,580</b>	<b>-6</b>

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

## Wheat flour prices stable over last six months

The average price of wheat flour was relatively stable over the last six months and in April it was 6 percent below its year-earlier level reflecting good domestic supplies (local production plus imports), stable export prices from Kazakhstan and the Government's decision to lift the VAT on imported wheat flour in January 2016.





# GIEWS Country Brief Kyrgyzstan

Reference Date: 12-December-2016

### FOOD SECURITY SNAPSHOT

- Cereal production declined in 2016
- Cereal imports in 2016/17 marketing year (July/June) forecast to increase
- Wheat flour prices eased in period September-November 2016

## Cereal production to decline in 2016 following reduced plantings and yields

FAO's latest estimate for total cereal production in 2016 is set at 1.66 million tonnes, a decline of 5.5 percent from the previous year on account of smaller wheat and maize crops. Wheat output is estimated at 654 million tonnes, down 7 percent from the 2015 level following a sharp reduction in plantings in response to abundant supplies of good quality wheat from Kazakhstan and the Russian Federation and since Kyrgyzstan joined the Eurasian Customs Union. Maize production is estimated down by 14 percent, following lower yields this year. By contrast, output of the barley crop rose by 14 percent following a 9 percent increase in plantings.

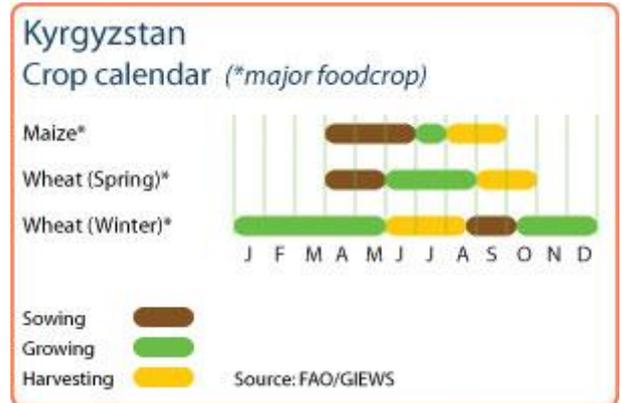
## Cereal imports in 2016/17 marketing year forecast to increase

Kyrgyzstan depends heavily on cereal imports to meet its consumption needs, with wheat accounting for about 98 percent of the total cereal imports. Wheat imports in the 2016/17 marketing year (July/June) are forecast at 550 000 tonnes, up 10 percent from the previous year's level.

The bulk of the wheat and wheat flour comes from Kazakhstan, although the share of imports from the Russian Federation has increased from 6 percent in 2010/11 to 20 percent in 2015/16.

## Wheat flour prices eased in September-November 2016

Prices of wheat flour declined in the period September-November 2016 and in November were below their year-earlier levels by more than 10 percent, reflecting abundant supplies in the subregion from the new harvest and, since January 2016, the exemption of import taxes on wheat flour. However, the Government has proposed to reintroduce the VAT on wheat from January 2017. This measure may support wheat flour prices in the future.



Kyrgyzstan  
Cereal production

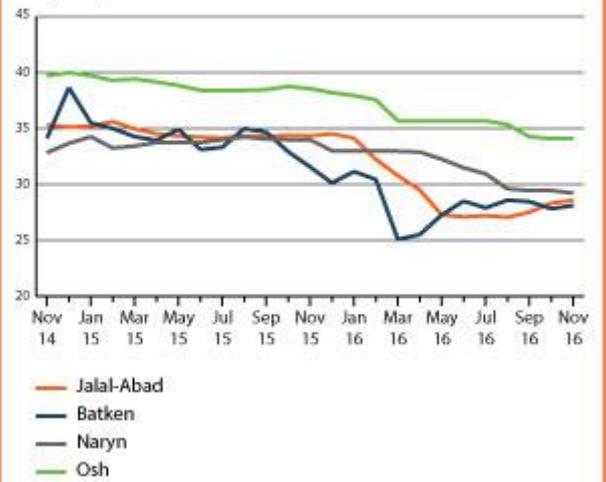
	2011-2015 average	2015	2016 estimate	change 2016/2015
	000 tonnes			percent
Wheat	711	705	654	-7
Maize	544	642	550	-14
Barley	269	370	420	14
Others	29	36	33	-8
<b>Total</b>	<b>1,552</b>	<b>1,753</b>	<b>1,657</b>	<b>-5</b>

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



## Kyrgyzstan Retail wheat flour prices

Som per Kg



Source: National Statistical Committee of the Kyrgyz Republic

Reference Date: 31-March-2016

### FOOD SECURITY SNAPSHOT

- Early forecasts point to lower cereal production in 2016 after 2015's good crop
- Cereal imports in 2015/16 marketing year (July/June) forecast to remain stable
- Wheat flour prices eased in early 2016

### Decline in cereal production forecast in 2016 following reduced plantings

The area planted to winter wheat for harvest in 2016 is reported to be down by about 8 percent in response to abundant supplies of good quality wheat from Kazakhstan and the Russian Federation, since Kyrgyzstan joined the Eurasian Customs Union. Recent remote sensing data indicates that the vegetative growth of winter wheat after the winter dormancy has started sooner this year as a result of the unusually warm temperatures and development is good despite lower-than-average precipitation. Planting of the 2016 spring cereal crops will start in April. At this early stage, assuming normal weather for the remainder of the season, FAO forecasts the country's total cereal production in 2016 at about 1.4 million tonnes, 20 percent down from the 2015 good crop, mostly on account of the reduced wheat crop expected.

### Cereal production in 2015 recovered from previous year's low level

FAO's latest estimate for the 2015 cereal production stands at 1.7 million tonnes, almost one-third up from the 2014 reduced level, mostly reflecting particularly favourable weather conditions in the main growing provinces. Wheat and maize outputs increased by almost 15 percent from the previous year's levels, while barley production almost doubled.

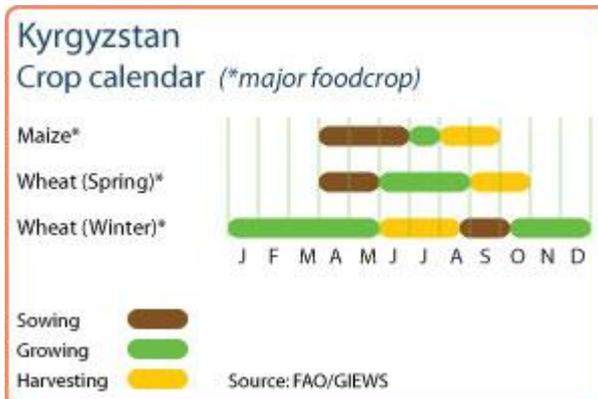
### Cereal imports in 2015/16 marketing forecast close to previous season's level

Kyrgyzstan depends heavily on cereal imports to meet its consumption needs, with wheat accounting for about 98 percent of the total cereal imports. Wheat imports in the 2015/16 marketing year (July/June) are forecast at 550 000 tonnes, around the previous year's above-average level.

The bulk of imports in 2015/16 are expected to come from the Russian Federation. Prior to 2015/16, Kazakhstan was the main supplier of wheat and wheat flour to the country but the lower quality of Kazakhstan wheat from the past two harvests, together with higher prices, have led Kyrgyzstan, with other importing countries of the region, to favour the Russian Federation as a source.

### Wheat flour prices eased in early 2016

Prices of wheat flour remained under downward pressure in the first quarter of 2016 and were generally below their year-earlier levels, reflecting low prices in the regional export market and adequate supplies from the 2015 good wheat output. As of 15 January, the Government



#### Kyrgyzstan Cereal production

	2010-2014 average	2014	2015 estimate	change 2015/2014
	000 tonnes			percent
Wheat	751	665	768	15
Maize	457	450	526	17
Barley	253	220	400	82
Others	27	31	31	0
<b>Total</b>	<b>1 488</b>	<b>1 366</b>	<b>1 725</b>	<b>26</b>

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



exempted imported wheat for milling from the value added tax to support local flour producers. This measure underpinned the decline in flour prices.



Reference Date: 23-October-2015

### FOOD SECURITY SNAPSHOT

- Cereal production in 2015 is estimated sharply up from previous year's reduced level
- Cereal imports in 2015/16 marketing year (July/June) forecast to remain stable
- Wheat flour prices eased marginally in September

### Cereal production in 2015 is estimated sharply up from last year's reduced level

Harvesting of the 2015 cereal crop (mainly wheat, barley and maize) is virtually completed and latest official information indicates a sharper recovery from last year's reduced crop than earlier expected. Aggregate output is estimated at 1.7 million tonnes, almost one-third up from last year's level, mostly reflecting particularly favourable weather conditions in the main growing provinces of Batken, Osh, Chuy and Jalal-Abad.

Wheat and maize outputs increased by 15 and 17 percent, respectively, from last year's reduced and near-average levels. Barley production almost doubled as a result of increased yields as well as a significant increase in area planted.

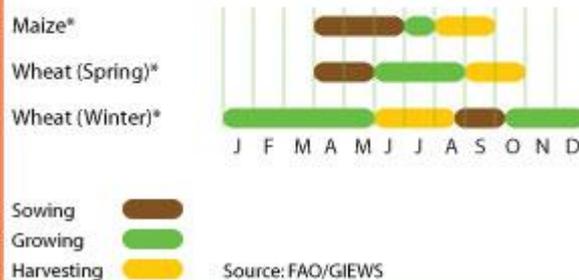
### Cereal imports in 2015/16 marketing year (July/June) are forecast to remain stable

The country depends heavily on cereal imports, mainly wheat, which account for about 98 percent of the total cereal import requirement and are mostly imported from Kazakhstan. Wheat imports in the 2015/16 marketing year (July/June) are forecast at 580 000 tonnes, around last year's above-average level.

### Wheat flour prices eased marginally in September

The recently-completed good 2015 wheat harvest weighed on prices of wheat flour, the main staple in the country, which, however, eased only marginally in September and were higher than their year-earlier values due to the depreciation of the national currency.

### Kyrgyzstan Crop calendar (\*major foodcrop)

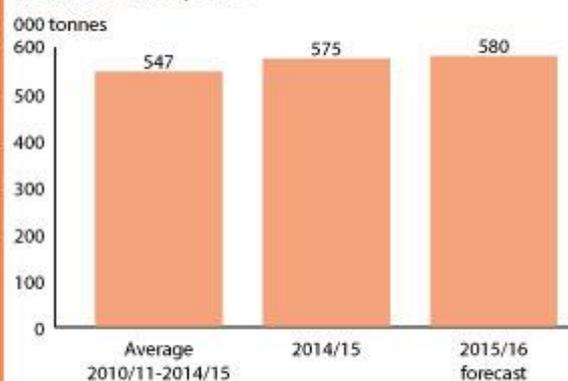


### Kyrgyzstan Cereal production

	2010-2014 average	2014	2015 forecast	change 2015/2014
	000 tonnes		percent	
Wheat	751	665	768	15
Maize	457	450	526	17
Barley	250	206	400	94
Others	27	31	31	0
<b>Total</b>	<b>1 485</b>	<b>1 352</b>	<b>1 725</b>	<b>28</b>

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

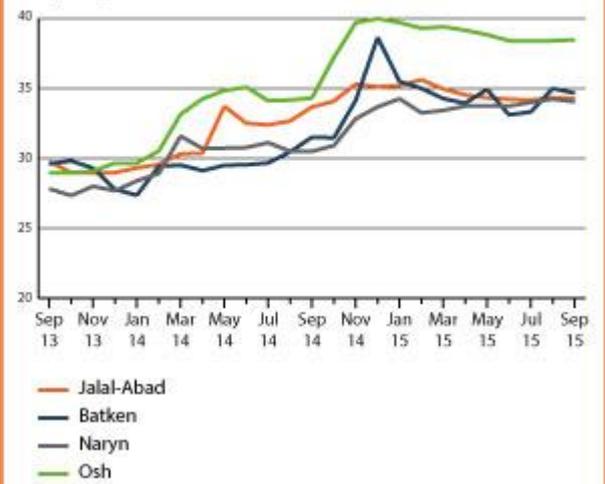
### Kyrgyzstan Total cereal imports



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

## Kyrgyzstan Retail wheat flour prices

Som per Kg



Source: National Statistical Committee of the Kyrgyz Republic

Reference Date: 18-May-2015

### FOOD SECURITY SNAPSHOT

- Prospects for 2015 winter cereal crops are favourable
- Cereal imports in 2014/15 marketing year (July/June) forecast to increase
- Wheat flour prices lingered at near-record levels in April

### Prospects for the 2015 winter cereal crops are favourable

The 2015 winter cereal crops, mainly wheat, are scheduled to be harvested from June, while planting of the spring cereal crops are about to be completed.

According to remote sensing data, seasonal rains and snowfall have been generally average to above average, despite precipitation deficits in parts. FAO's latest forecast for the 2015 wheat production is set at 800 000 tonnes, a recovery from last year's drought reduced crop.

Overall, the 2015 cereal production is anticipated to reach 1.6 million tonnes, up 16 percent from the 2014 reduced output.

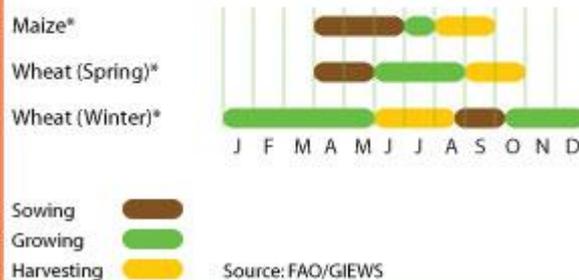
### Cereal imports in 2014/15 marketing year (July/June) are forecast to increase

The country depends heavily on cereal imports, mainly wheat. As a result of the estimated decrease in 2014 production, wheat imports in the 2014/15 marketing year (July/June) are forecast to increase to 600 000 tonnes, up 11 percent from the previous year's high level. In average, the country imports about 40 percent of its wheat consumption requirements, mainly from Kazakhstan.

### Wheat flour prices lingered at near-record levels in April

Prices of wheat flour, the main staple in the country, remained unchanged or eased somewhat in April compared to the past few months but were still at near-record levels, with nominal prices up to 17 percent higher than their year-earlier values. A sharp depreciation of the national currency since September 2014, coupled with relatively high wheat export quotations in Kazakhstan, as well as the reduced 2014 wheat output, have kept upward pressure on prices in recent months.

### Kyrgyzstan Crop calendar (\*major foodcrop)

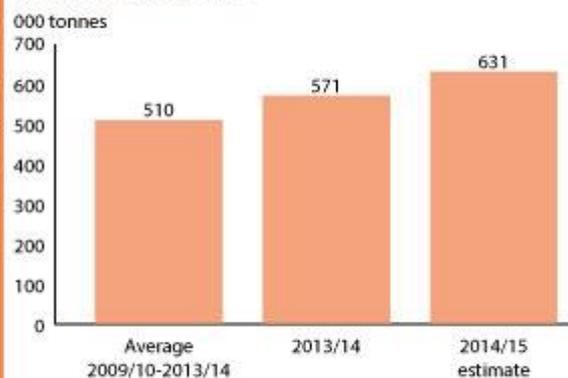


### Kyrgyzstan Cereal production

	2010-2014 average	2014	2015 forecast	change 2015/2014
	000 tonnes			percent
Wheat	753	675	800	19
Maize	457	450	489	9
Barley	254	225	276	23
Others	27	31	31	0
<b>Total</b>	<b>1 491</b>	<b>1 381</b>	<b>1 596</b>	<b>16</b>

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

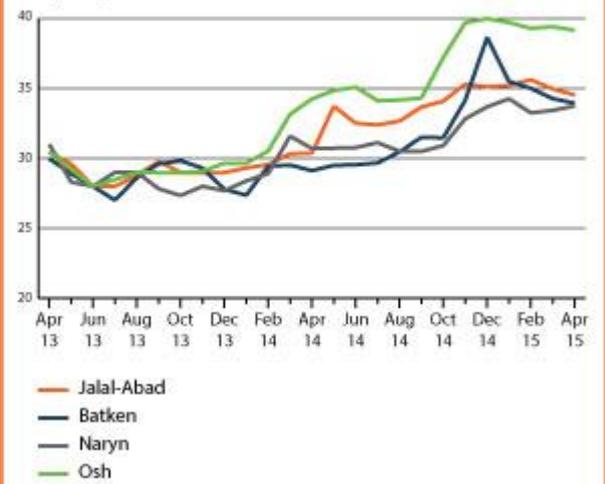
### Kyrgyzstan Total cereal imports



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

## Kyrgyzstan Retail wheat flour prices

Som per Kg



Source: National Statistical Committee of the Kyrgyz Republic

Reference Date: 19-January-2015

### FOOD SECURITY SNAPSHOT

- Cereal production in 2014 is estimated to decline sharply from last year's near-average level
- Cereal imports in 2014/15 marketing year (July/June) are forecast to increase
- Prices of wheat flour reached record or near-record levels in December

### Cereal production in 2014 is estimated to decline sharply from last year's near-average level

Harvesting of 2014 cereal crops (mainly wheat, barley and maize) was completed by the end of October. FAO's latest estimates put 2014 wheat production at 670 000 tonnes, 16 percent down from last year's below-average level. The decrease is mainly attributed to estimated lower yields, as a result of below-average rainfall during the crucial period of the growing season, as well as a slight contraction in area planted, following a shift to more profitable crops. Similarly, the 2014 maize output is expected to decrease to 400 000 tonnes, 14 percent below last year's average level. Total cereal production in 2014 is estimated at 1.3 million tonnes, 18 percent below last year's level.

Planting of the winter cereal crops, mainly wheat and barley started in mid-August and was completed by mid-October. Weather conditions between August and mid-October have been generally favourable, benefiting planting and establishment of the crops. Early indications point to an increase in area planted to winter wheat to 183 000 hectares.

### Cereal imports in 2014/15 marketing year (July/June) are forecast to increase

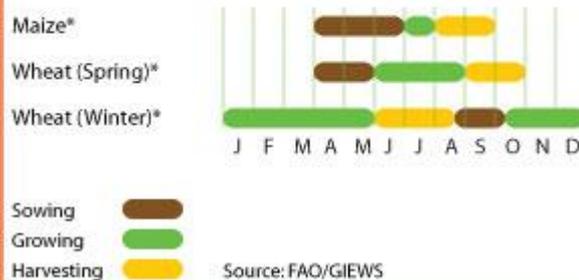
The country depends heavily on cereal imports, mainly wheat, which accounts for about 98 percent of the total cereal import requirements. As a result of the estimated decrease in 2014 wheat production, wheat imports in the 2014/15 marketing year (July/June) are forecast to increase to 600 000 tonnes, up 11 percent from last year's high level. In average, the country imports about 40 percent of its wheat consumption requirements, mainly from Kazakhstan.

### Prices of wheat flour reached record or near-record levels in December

Prices of wheat flour, the main staple in the country, have been increasing in the past few months and in December they reached record or near-record levels in nominal terms.

The depreciation of the nation currency in late 2014, coupled with increased wheat export quotations from Kazakhstan underpinned prices. The Government has recently taken measures to support the currency, mainly selling US dollars in the currency market. Wheat flour prices were also supported by high domestic fuel costs, despite some declines in December and the first weeks of January. Prices of potatoes, another important staple, have been also rising markedly in

### Kyrgyzstan Crop calendar (\*major foodcrop)

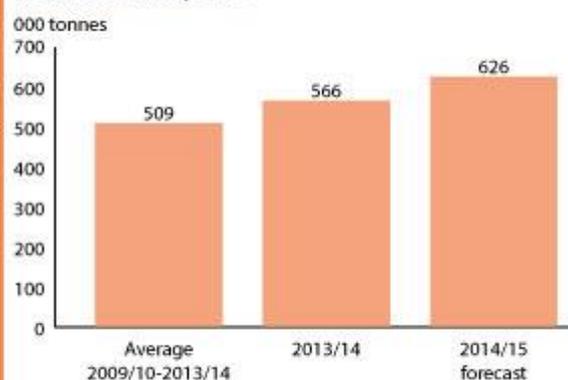


### Kyrgyzstan Cereal production

	2009-2013 average	2013	2014 forecast	change 2014/2013
	000 tonnes		percent	
Wheat	829	800	670	-16
Maize	465	465	400	-14
Barley	267	320	225	-30
Others	22	27	28	4
<b>Total</b>	<b>1 583</b>	<b>1 612</b>	<b>1 323</b>	<b>-18</b>

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

### Kyrgyzstan Total cereal imports



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

the past few months and in December they were well above their year-earlier levels.

According to latest official reports, approximately 37 percent of the population was estimated to live under the poverty line and the ratio of households' budget allocated to food remained high at around 61 percent.



Reference Date: 30-October-2014

### FOOD SECURITY SNAPSHOT

- 2014 cereal production is estimated to decline sharply from last year's near-average level
- Cereal imports in 2014/15 marketing year (July/June) are forecast to increase
- Prices of wheat flour remained stable over the past months

### 2014 cereal production is estimated to decline sharply from last year's near-average level

Harvesting of 2014 cereal crops (mainly wheat, barley and maize) is almost complete. FAO's latest estimates put this year's wheat production at 670 000 tonnes, 16 percent down from last year's below-average level. The decrease is mainly attributed to estimated lower yields, as a result of below-average rainfall during the crucial period of the growing season, as well as a slight contraction in area planted, following a shift to more profitable crops. Similarly, the 2014 maize output is expected to decrease to 400 000 tonnes, 14 percent below last year's average level. Total cereal production in 2014 is estimated at 1.3 million tonnes, 18 percent below last year's level.

Planting of the winter cereal crops, mainly wheat and barley started in mid-August and was completed by mid-October. Weather conditions between August and mid-October have been generally favourable, benefiting planting activities. Early indications point to an increase in area planted to winter wheat to 183 000 hectares.

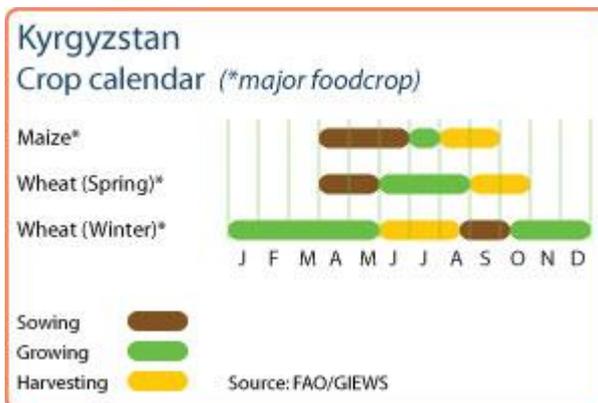
### Cereal imports in 2014/15 marketing year (July/June) are forecast to increase

The country depends heavily on cereal imports, mainly wheat, which accounts for about 98 percent of the total cereal import requirements. As a result of the estimated decrease in this year's wheat production, wheat imports in the 2014/15 marketing year (July/June) are forecast to increase to 600 000 tonnes, up 11 percent from last year's high level. Wheat is mainly imported from Kazakhstan.

### Prices of wheat flour remained stable over the past months

Prices of wheat flour were unchanged in September and higher than the corresponding period last year. The estimated decline in the 2014 wheat production, driven by reduced yields, offset the downward pressure from the nearly-completed harvest. Increased transport and gasoline costs, which averaged more than 20 percent higher than in September 2013, provided support. To compensate for this year's reduced output, the Government is negotiating with the Islamic Development Bank to help finance the importation of 150 000 tonnes of wheat from Kazakhstan, the country's main supplier. Prices of staple potatoes continued to decline with good supplies from the new 2014 harvest and were up to 60 percent lower than the record highs reached in mid-year.

According to latest official reports, approximately 37 percent of the



### Kyrgyzstan Cereal production

	2009-2013 average	2013	2014 forecast	change 2014/2013
	000 tonnes		percent	
Wheat	829	800	670	-16
Maize	465	465	400	-14
Barley	267	320	225	-30
Others	22	27	28	4
<b>Total</b>	<b>1 583</b>	<b>1 612</b>	<b>1 323</b>	<b>-18</b>

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



population was estimated to live under the poverty line and the ratio of households' budget allocated to food remained high and was estimated at around 61 percent.



Reference Date: 16-September-2014

### FOOD SECURITY SNAPSHOT

- The 2014 cereal production is estimated to decrease, due to unfavourable weather conditions in parts of the country
- Cereal imports in the 2014/15 marketing year (July/June) are forecast to increase
- Prices of wheat flour remained stable over the past months

### The 2014 cereal production is estimated to decrease

Harvesting of winter cereal crops (mainly wheat and barley) was completed by mid-August, while that of spring crops (mainly maize) is well underway and is expected to continue until the end of October. FAO's latest estimates put this year's wheat production at 700 000 tonnes, 12 percent down from last year's below-average level. The decrease is mainly attributed to estimated lower yields, as a result of below-average rainfall during the crucial period of the growing season, as well as a slight contraction in area planted, following a shift to more profitable crops. Similarly, the 2014 maize output is expected to decrease to 450 000 tonnes, 3 percent below last year's average level. Total cereal production in 2014 is estimated at 1.5 million tonnes, 7 percent below last year's level.

Planting of the winter cereal crops, mainly wheat started in mid-August under favourable weather conditions.

### Cereal imports in the 2014/15 marketing year (July/June) are forecast to increase

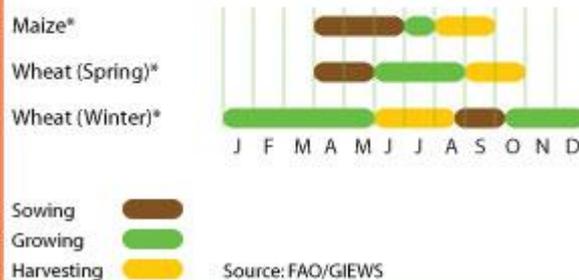
The country depends heavily on cereal imports, mainly wheat, which account for about 96 percent of the total cereal import requirements. As a result of the anticipated decrease in this year's wheat production, wheat imports in the 2014/15 marketing year (July/June) are forecast to increase to 600 000 tonnes, up 11 percent from last year's high level. Wheat is mainly imported from Kazakhstan.

### Prices of wheat flour remained stable over the past months

Prices of wheat flour remained stable over the past months but were higher than a year earlier in several markets as a result of the anticipated reduction of the 2014 crop. Prices of potatoes generally plummeted in August, declining for the third consecutive month and were well below their levels at the same time last year, reflecting good supplies from the 2014 harvest.

According to latest official reports, approximately 37 percent of the population was estimated to live under the poverty line and the ratio of households' budget allocated to food remained high and was estimated at around 61 percent.

### Kyrgyzstan Crop calendar (\*major foodcrop)

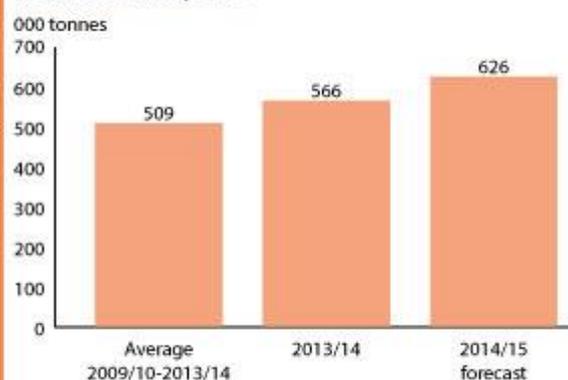


### Kyrgyzstan Cereal production

	2009-2013 average	2013	2014 forecast	change 2014/2013
	000 tonnes		percent	
Wheat	829	800	700	-12
Maize	465	465	450	-3
Barley	267	320	320	0
Others	21	23	23	0
<b>Total</b>	<b>1 583</b>	<b>1 608</b>	<b>1 493</b>	<b>-7</b>

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

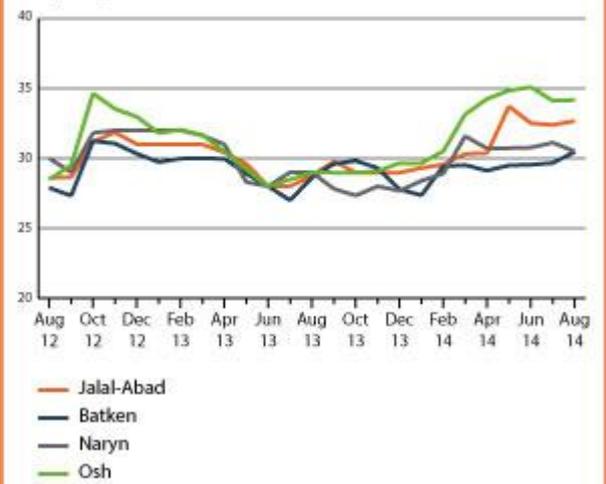
### Kyrgyzstan Total cereal imports



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

## Kyrgyzstan Retail wheat flour prices

Som per Kg



Source: National Statistical Committee of the Kyrgyz Republic

Reference Date: 14-December-2012

### FOOD SECURITY SNAPSHOT

- The planting of winter crops has been completed and the planted area has increased slightly
- Crop production in 2012 was significantly reduced due to unfavourable weather conditions
- About half of all food consumed domestically comes from imports
- The prices of staple products increased to record levels

### The planting of winter crops has been completed and the planted area has increased slightly

Despite a very slow start, the sowing of winter crops has now been completed. Moreover, the planted area has increased by about 5 percent. During the planting season there was shortage of seeds and the Russian Federation supplied around 20 000 tonnes of seed as humanitarian aid.

### Crop production in 2012 was significantly reduced due to unfavourable weather conditions

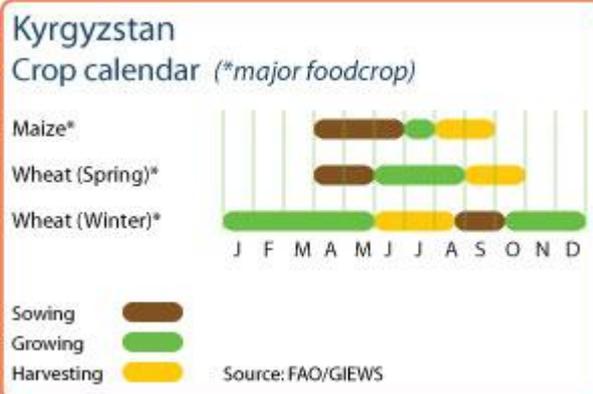
Due to unfavourable weather conditions – specifically high temperatures combined with below-average precipitation during spring and summer months – the country's annual cereal output fell significantly (by 17 percent). The largest decrease – by almost one third – was in wheat. Preliminary official estimates of total cereal production in 2012 are put at 1.3 million tonnes, half of which is wheat. Total production is 18 percent below the five-year-average and wheat production is 30 percent lower. Also, yields declined by 15 and 25 percent respectively. Maize production is estimated to be close to last year's levels or about 450 000 tonnes.

### About half of all food consumed domestically comes from imports

The country needs to import a significant volume of wheat to satisfy domestic consumption demands. Cereal import requirements are estimated at around 50 percent of food consumption in the 2012/13 marketing year (July/June) or 465 000. This is down by 28 percent compared to last year. To stabilize the food supply situation, the Kyrgyzstani authorities have increased stock levels since 2009, following a bumper harvest.

### The prices of staple products increased to record levels

Wheat flour prices in November remained around their record October levels, strengthening on some markets but weakening others following the release of stocks from state reserves. The high prices reflect the reduced 2012 wheat output and high values in the regional export markets, as the country imports about one-third of its consumption requirements on average. In order to ease price increases, the Government signed an agreement with the Russian Federation in mid-November to import 100 000 tonnes of wheat on a concessional basis to be delivered by the end of 2012.



**Kyrgyzstan**  
Cereal production

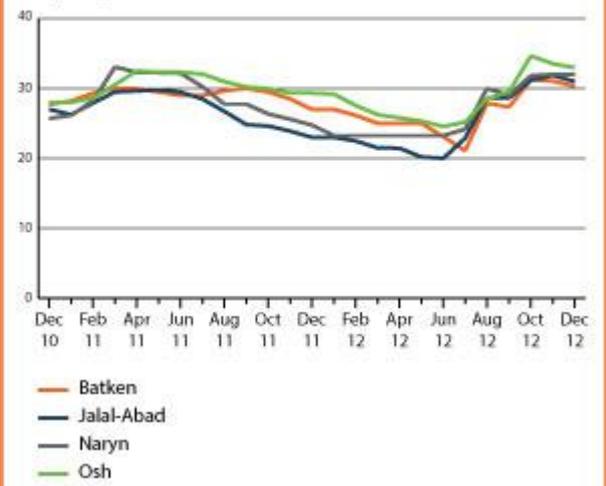
	2007-2011 average	2011	2012 estimate	change 2012/2011
	000 tonnes		percent	
Wheat	858	866	600	-31
Maize	456	446	450	1
Barley	244	240	220	-8
Others	22	23	23	0
<b>Total</b>	<b>1,580</b>	<b>1,575</b>	<b>1,293</b>	<b>-18</b>

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



## Kyrgyzstan Retail wheat flour prices

Som per Kg



Source: National Statistical Committee of the Kyrgyz Republic

Reference Date: 13-September-2011

### FOOD SECURITY SNAPSHOT

- Crop production in 2011 around last year's level
- The country heavily depends on wheat imports for food
- Food prices in July remained significantly higher than a year earlier

### Crop production in 2011 similar to last year

Since 75 percent of the country's annual cereal output is under irrigation, high temperature combined with below average precipitation during spring and summer 2011 did not significantly impact crop conditions though led to low soil moisture in some parts of the country. In order to ease drought conditions in downstream areas during July and August, the water authorities increased outflows from the Toktogul reservoir. Water volumes at the reservoir, which has a multi-year storage capacity, continued to be above (35–45 percent), the seasonal averages for the May-June period.

Harvesting of the 2011 cereals is about to be completed, with those of wheat and barley almost finished, except in northern parts of the country, and that of maize still ongoing. Preliminary official estimates wheat and barley production in 2011 is put at 830 000 and 250 000 tonnes respectively, around last year's level and slightly below the previous five-year average. The maize production is estimated to increase by 7 percent compared with last year's level to 447 000 tonnes.

Land is under preparation for planting of the 2011/12 winter cereal cropping season.

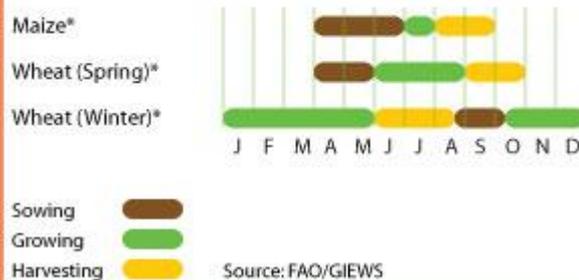
### The country heavily depends on wheat imports for food consumption

The country needs to import a significant volume of wheat to satisfy food consumption. Cereal import requirements are estimated at around 46 percent of food consumption in 2011/12 marketing year (July/June) or 830 000 tonnes, a level similar to that recorded in the 2010/11 marketing year. To stabilize the food supply situation, the country authorities have build-up a high level of stocks since 2009, following a bumper harvest recorded.

### Food prices of staple products remain high

Wheat flour prices which had slightly decreased in July continued to drop in August following the arrival of the 2011 wheat harvest. The resumption of fuel deliveries from the Russian Federation in late July contributed to lower transport costs and food prices. However, despite the recent declines, wheat flour prices in most markets remained 30 to 40 percent above their levels in August 2010.

### Kyrgyzstan Crop calendar (\*major foodcrop)

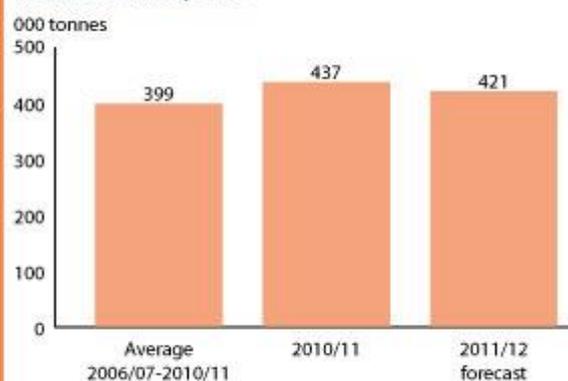


### Kyrgyzstan Cereal production

	2006-2010	2010	2011	change
	average		forecast	2011/2010
	000 tonnes		percent	
Wheat	853	833	830	0
Maize	454	419	447	7
Barley	237	254	250	-2
Others	22	24	22	-8
<b>Total</b>	<b>1 566</b>	<b>1 530</b>	<b>1 549</b>	<b>1</b>

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

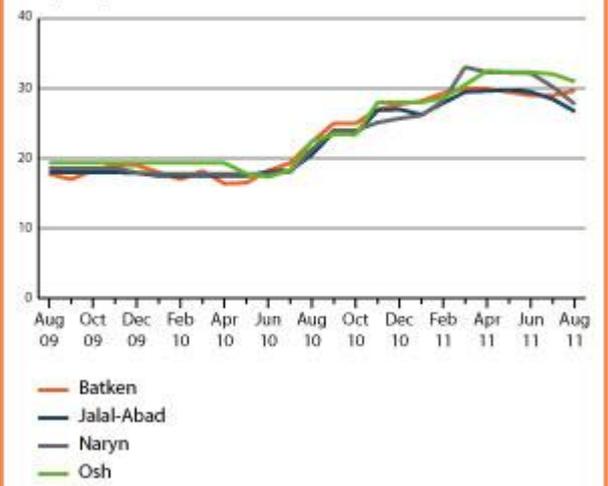
### Kyrgyzstan Total cereal imports



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

## Kyrgyzstan Retail wheat flour prices

Som per Kg



Source: National Statistical Committee of the Kyrgyz Republic

Reference Date: 25-May-2011

### FOOD SECURITY SNAPSHOT

- Area planted to 2011 winter cereal crops lower than last year
- Cereal imports remain high
- Prices of wheat and wheat products continue to rise

### 2011 winter cereal crop production could decline following lower plantings

The area planted to 2011 winter cereal crops, mainly wheat, is estimated to have decreased by 4 percent. Precipitation and soil moisture at sowing time, October-November of 2010, were not favourable for planting and subsequently rains have been erratic in the main southern growing areas. Production is forecast to decline comparing with the same season last year. Winter wheat normally accounts for some 60 percent of annual production. Spring sowing is close to completion. Adequate precipitation was received in April and May 2011 normalizing soil moisture conditions and planting and development of crops. Overall, total cereal production is forecast at some 1.5 million tonnes or about the average level of last year. A significant 30 percent increase of sowing of oilseeds and cotton is reported.

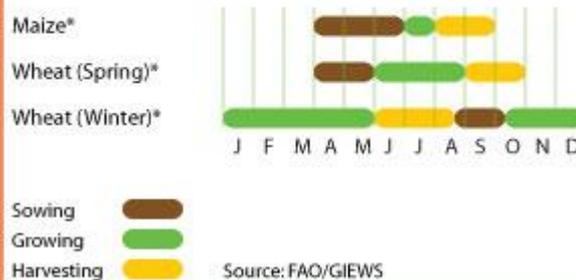
### Cereal imports remain high in 2010/11 (July/June)

Cereal import requirements, mostly wheat, are estimated at around 437 000 tonnes in the 2010/11 marketing year (July/June), which is about 20 percent higher than in the previous year because of the decline of 2010 production and stock replenishment. Imports of wheat and wheat flour, mostly from Kazakhstan, represent 33 percent of domestic wheat consumption.

### Increasing food prices remain a concern for food security of vulnerable populations

Prices of bread and wheat flour, which have been steadily increasing since June 2010 rose further in April 2011. National average prices of wheat flour and bread in April 2011 were 80 percent and 33 percent, respectively higher than in the same month of 2010. The main factors driving up food prices are a decline in 2010 production, higher wheat import prices, higher prices of fuel and other agricultural inputs. The higher food prices negatively affect vulnerable households, who spend around 65 percent of their budget on food.

### Kyrgyzstan Crop calendar (\*major foodcrop)

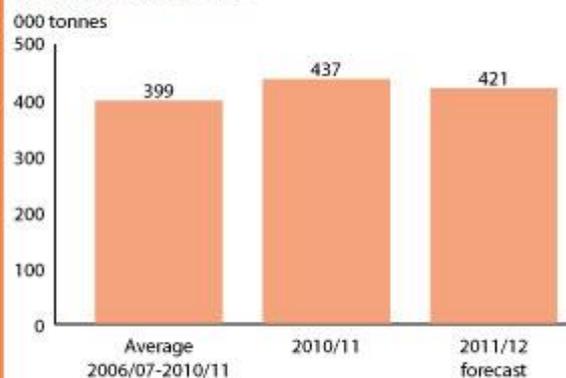


### Kyrgyzstan Cereal production

	2006-2010 average	2010	2011 forecast	change 2011/2010
	000 tonnes		percent	
Wheat	853	833	810	-3
Maize	454	419	420	0
Barley	237	254	250	-2
Others	3	4	4	0
<b>Total</b>	<b>1 566</b>	<b>1 530</b>	<b>1 499</b>	<b>-2</b>

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

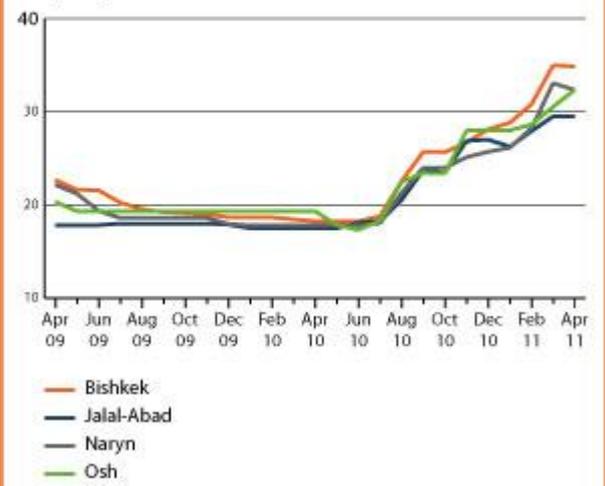
### Kyrgyzstan Total cereal imports



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

## Kyrgystan Retail prices of wheat flour

Som per kg



Source: National Statistical Committee of the Kyrgyz Republic

Reference Date: 21-March -2011

### FOOD SECURITY SNAPSHOT

- Area planted to 2011 winter cereal crops lower to last year
- Cereal imports remain high
- Prices of wheat and wheat products continue on the rise

### The 2011 winter cereal crop production could decline following lower plantings

The area planted to the 2011 winter cereal crops, mainly wheat, is estimated to have decreased by 4 percent and production is forecast to decline comparing to the same season last year. Precipitation and soil moisture at sowing time in October-November were less favourable than at the same time last year. Growing conditions improved with good rains in February but precipitation was erratic in March in the main southern growing areas. More rains are needed in the coming weeks for the development of the crops during spring. Winter wheat accounts for some 60 percent of the annual production.

### Cereal output decreased in 2010

In 2010 the cereal production was estimated slightly below the previous five years' average but significantly lower than the 2009 record. The aggregate wheat, barley, maize, and minor cereals production was estimated at around 1.5 million tonnes or down by around 19 percent. Wheat production is estimated over 813 000 tonnes or 23 percent lower than 2009 output. Maize and barley production have also fallen by 14 and 12 percent respectively. Potato production declined by 4 percent. The reduction of the main wheat crop is due to diversion of land to more profitable fodder crops and lower yields due to shortages and increased costs of agricultural inputs, following political conflict and social unrest.

### Cereal imports remain high in 2010/11 (July/June)

Cereal imports requirements, mostly wheat, are estimated at around 374 000 tonnes for the 2010/11 marketing year (July/June), similar to the previous marketing year despite the decline in 2010 cereal production. This reflects a drawdown of stocks following the bumper 2009 harvest. At the forecast level, imports of wheat and wheat flour represent 35 percent of the domestic wheat consumption.

### Increasing prices remain a concern

Prices of bread and wheat flour, which have been steadily increasing since August 2010, rose further in February. In Bishkek, prices of wheat flour and bread in February were 65 percent and 26 percent, respectively, higher than a year earlier. The main factors driving up food prices are a decline in the 2010 production, higher wheat export prices, higher prices of fuel and other agricultural inputs. The higher food prices negatively affect vulnerable households, who spend around 65 percent of their budget on food.

### Kyrgyzstan

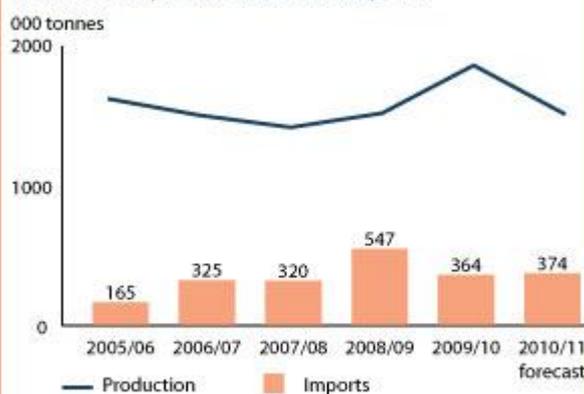
#### Cereal production

	2005-2009 average	2009	2010 estimate	change 2010/2009
	000 tonnes			percent
Wheat	876	1057	813	-23
Maize	458	490	419	-14
Barley	229	290	254	-12
Others	22	24	25	4
<b>Total</b>	<b>1585</b>	<b>1861</b>	<b>1511</b>	<b>-19</b>

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

### Kyrgyzstan

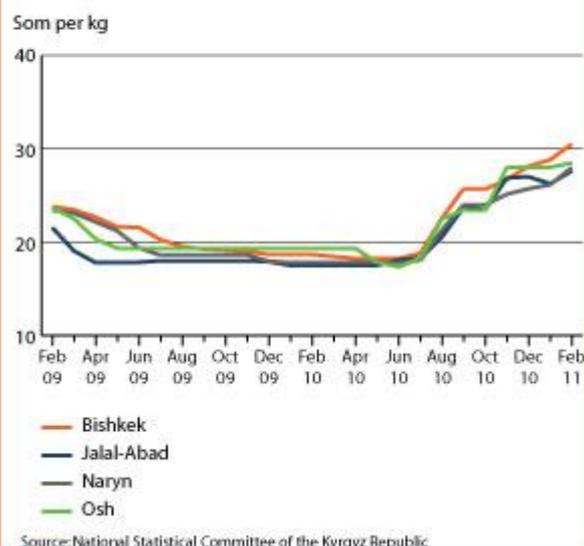
#### Total cereal production and imports



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

### Kyrgyzstan

#### Retail prices of wheat flour



Source: National Statistical Committee of the Kyrgyz Republic

Reference Date: 9-November-2010

### FOOD SECURITY SNAPSHOT

- Overall weather conditions were mostly favourable for 2010 crops, but plantings were reduced due to social unrest, declining farm gate prices and lack of inputs
- The crop production in 2010 is below 2009 record but still above the five year average
- Cereal imports still significant and prices are rising

### The overall agricultural situation in 2010

Weather conditions have been favourable for the 2010 cereal crop production at planting time and during vegetation period. High rainfall in early spring 2010 and social unrest delayed the spring crops planting season by 2 to 3 weeks. But good rainfall levels in the summer have offset the negative effects on yield of the late start in the spring. However, declining farm gate prices and lack of agricultural inputs contributed to a significant reduction of crop area cultivated. Harvesting of cereals is under completion: harvesting of wheat and barley is almost finished except northern in parts of the country; maize harvesting is ongoing. With favourable weather conditions, increased fodder crops production, particularly good pasture conditions, generally healthy stocks, it is anticipated that livestock numbers will increase this year by 6 percent for cattle, 3 percent for horses and 4 percent for sheep and goats. However, due to social instability, overall agriculture output might decline, though insignificantly.

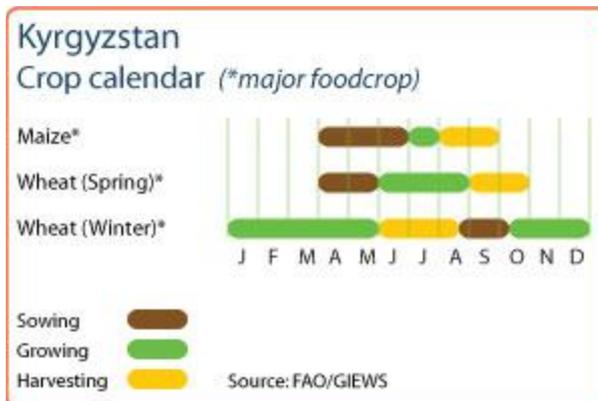
### Crop production in 2010 below 2009 record but still average

Despite a late start of the spring season and the April and June civil unrest, 2010 crop production is close to the previous five years' average but significantly lower than the 2009 record. For cereals in aggregate (wheat, barley, maize, and minor cereals) production is estimated at around 1.56 million tonnes, only marginally below the past five years' average, but 16 percent lower than the record 2009 harvest. Wheat production is estimated at 866 000 tonnes, 18 percent lower than 2009 output and maize and barley production have also fallen by 14 and 12 percent respectively. Potato production is estimated to decline by 5 percent. The reduction of cereal production is mainly due the impact of social unrest, lower farm gate prices and the closure of the Kazakhstan and Uzbekistan borders, which disrupted input supplies, in particularly, fertilizer and fuel.

### Cereal imports still significant and prices are rising

Cereal imports requirements, mostly wheat, are estimated at around 360 000 tonnes for the 2010/11 marketing year (July/June), about the same as the previous year despite the lower wheat production this year. This reflects the high level of carryover stocks accumulated by authorities after the good 2009 harvest which are expected to be utilized this year. Nevertheless, a large portion of wheat consumption will continue to be covered by imports of wheat and wheat flour.

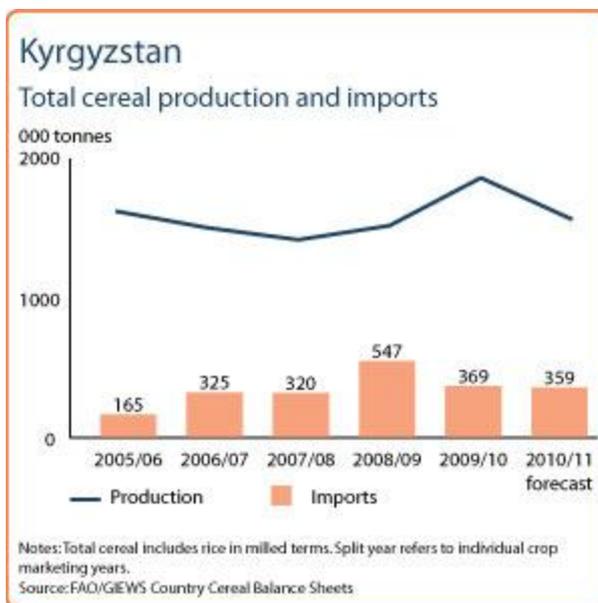
Prices of bread and wheat flour which had declined since the end of 2009 and remained almost the same for meat, milk and eggs, have



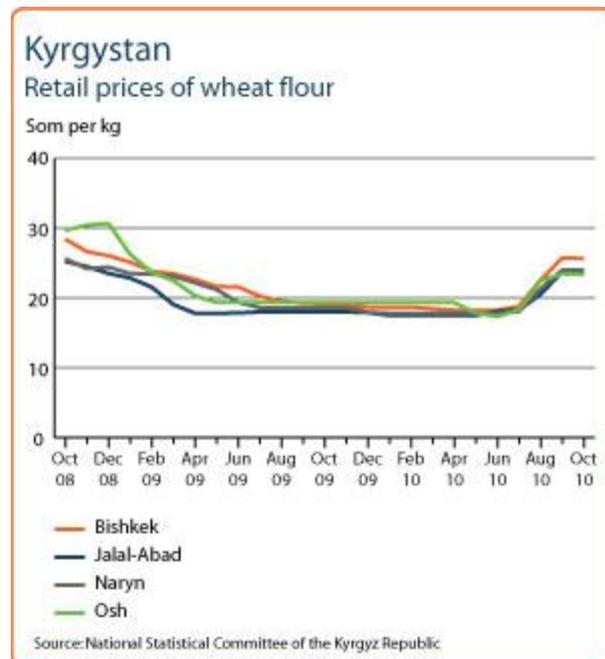
### Kyrgyzstan Cereal production

	2005-2009 average	2009	2010 forecast	change 2010/2009
	000 tonnes		percent	
Wheat	876	1057	866	-18
Maize	458	490	419	-14
Barley	229	290	254	-12
Others	22	24	24	0
<b>Total</b>	<b>1585</b>	<b>1861</b>	<b>1563</b>	<b>-16</b>

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



started to increase again since June 2010. The national average price of wheat flour reached SOM 24.66/kg in October, 35 percent up from its June level. Prices of bread, not regulated by the Government, have followed the same trend. Prices have also been supported by higher fuel prices and lower domestic wheat production this year. The country faces difficulties due to the slowing down of economic growth, unemployment and reduced remittances that in turn decreased the income of population.



Reference Date: 16-September-2010

### FOOD SECURITY SNAPSHOT

- Cereal production in 2010 dropped well below the previous year's level but was still slightly above the five year average
- Cereal import needs are significant and food security is fragile

## The overall agricultural situation in 2010

After adverse heavy rains at the start of the main spring planting period, weather conditions were subsequently favourable for the 2010 cereal crops throughout the remainder of the growing season. Declining farm-gate prices last year and lack of agricultural inputs contributed to a reduction of crop area cultivated. As of mid-September, harvesting of wheat and barley was almost finished except in northern parts of the country, while maize harvesting was still ongoing. With above average rainfall, increased fodder crops production, particularly good pasture conditions, and generally healthy stocks, it is anticipated that the livestock numbers will increase this year by 6 percent for cattle, 3 percent for horses and 4 percent for sheep and goats.

## Crop production in 2010

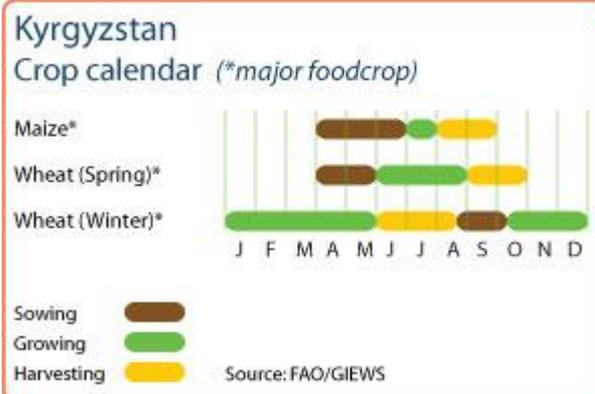
Despite a late start of the spring planting and the April and June civil unrest, the overall performance of the 2010 crop production is slightly above the five-year average but significantly lower than in 2009. It is estimated that the 2010 aggregate cereal output (mostly wheat, barley and maize) was about 1.5 million tonnes, 16 percent down from 2009. The reduction of cereal production is mainly due to a general decreasing trend in wheat cultivation over the past decade, the impact of social unrest and the closure of the Kazakhstan and Uzbekistan borders, which disrupted input supplies, in particular, fertilizer and fuel.

## Cereal imports still significant and food security is fragile

Cereal import are estimated to be required for about 40 percent of the country's food needs in the 2010/11 marketing year, most of which would be wheat.

Despite the fact that the food supply situation in Kyrgyzstan has improved somewhat with the good harvest in 2009 and high level of carryover stocks accumulated by authorities, it is estimated that some 40 percent of food wheat consumption needs will have to be covered by imports of wheat and wheat flour in the 2010/11 marketing year.

In July 2010, prices for basic products (bread, wheat flour, beef and mutton) started to increase. The price of wheat flour increased by 2.4 percent in July, and a further 16 percent since 1 August due to the fluctuation of wheat prices on international markets. In Osh, the main conflict zone, it increased by 20 percent. The country faces difficulties due to the slowing down of economic growth, unemployment and reduced remittances that in turn decreased the income of population.



### Kyrgyzstan Cereal production

	2005-2009 average	2009	2010 forecast	change 2010/2009
	000 tonnes			percent
Wheat	876	1057	866	-18
Maize	458	490	419	-14
Barley	229	290	254	-12
Others	22	24	24	0
<b>Total</b>	<b>1585</b>	<b>1861</b>	<b>1563</b>	<b>-16</b>

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

