



GIEWS Country Brief The Republic of Tajikistan

Reference Date: 04-October-2023

FOOD SECURITY SNAPSHOT

- Favourable rainfall and irrigation conditions resulted in above-average cereal production in 2023
- Cereal imports forecast at below-average level in 2023/24
- Prices of wheat flour lower than year before

Favourable rainfall and irrigation conditions resulted in above-average cereal production in 2023

Harvesting of 2023 winter cereal crops, mainly wheat, which were planted between September and November 2022, concluded in July. According to preliminary results of the FAO/WFP Crop and Food Security Assessment Mission (CFSAM), carried out with the technical support of the Ministry of Agriculture (MoA) and the Agency on Statistics (AoS) under the President of the Republic of Tajikistan, the 2023 aggregate cereal output is estimated at 1.5 million tonnes, 22 percent above the five-year average level. Production of wheat is set at an above-average level of 1.05 million tonnes, while the outputs of maize and barley are estimated at 227 000 and 169 000 tonnes, respectively, both above-average levels. In 2023, crops benefited from favourable rainfall and irrigation conditions, together with lower prices of farming inputs, such as fertilizers and seeds. Particularly low temperatures during 2022/23 had a beneficial effect on field crops by killing wintering eggs of pests.

Planting of 2024 winter cereal crops is ongoing and crops will be harvested next year from June onwards.

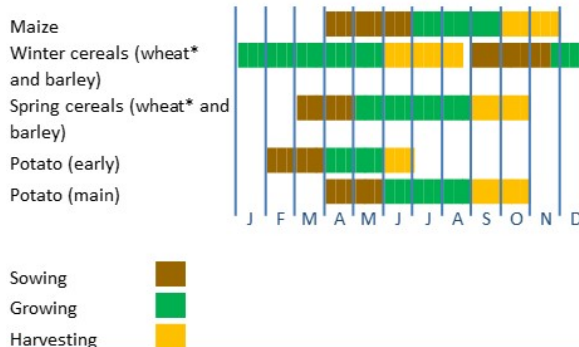
Cereal imports forecast at below-average level in 2023/24

Imports account for more than half of the domestic consumption needs of cereals and wheat represents more than 90 percent of the cereal imports. Import requirements of wheat in the 2023/24 marketing year (July/June) are forecast at an average level of 1 million tonnes. During the last ten years, due to improved local milling capacities, imports of wheat grain have been increasing, while purchases of wheat flour have decreased by almost 90 percent.

Tajikistan

Crop Calendar

(*major foodcrop)



Tajikistan

Cereal Production

	2018-2022 average	2022	2023 estimate	change 2023/2022
	000 tonnes			percent
Wheat	831	840	1 050	25.0
Maize	222	220	104	-52.7
Barley	152	150	169	12.7
Others	114	126	136	7.8
Total	1 319	1 336	1 459	9.2

Note: Percentage change calculated from unrounded data.

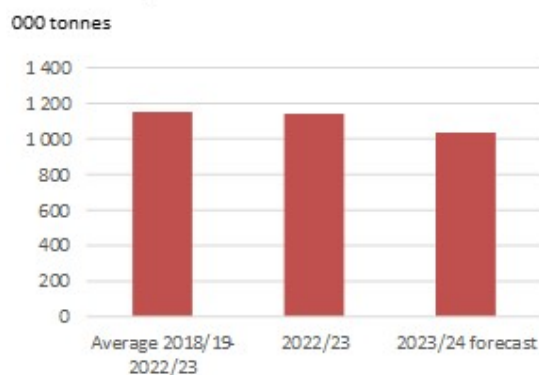
Prices of wheat flour lower than year before

Food inflation in 2023 is estimated at 1.1 percent and prices of national and imported food commodities have slightly increased between May 2022 and May 2023. However, prices of agriculture inputs such as fertilizers, pesticides, machinery and fuel, have decreased in 2023 due to the high volume of imports from the Russian Federation and Uzbekistan.

National average retail prices of first grade wheat flour declined in the second quarter of 2023 and remained slightly lower compared to the previous year. In April 2023, the average national retail price of wheat flour was 10 percent lower than in April 2022. By contrast, prices of potatoes showed a seasonal increase between April and October 2023, increasing sharply before the main harvest and then decreasing with the start of the new planting season.

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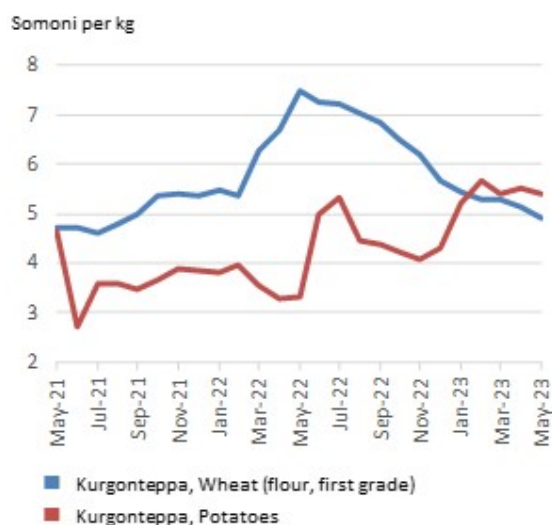
Cereals Imports



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

Tajikistan

Retail prices of wheat flour and potatoes



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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/>.



GLEWS Country Brief Tajikistan

Reference Date: 03-January 2023

FOOD SECURITY SNAPSHOT

- Exceptionally high rainfall amounts hampered late planting operations of 2023 winter crops
- Cereal output estimated at near-average level in 2022
- Prices of wheat flour higher than year before
- Gross domestic product (GDP) growth forecast to slow down further in 2023 due to low remittances inflows

Exceptionally high rainfall amounts hampered late planting operations of 2023 winter crops

Planting of the 2023 winter cereal crops (mainly wheat), to be harvested from June 2023, took place between September and mid-November. In the main wheat producing Khatlon Region, precipitation amounts were below average from September to early October and well above average afterwards. In the first dekad of November, rainfall amounts were almost five times higher than the Long-term average (LTA) and hampered late planting activities.

Cereal output estimated at near-average level in 2022

Harvesting of the 2022 winter cereal crops was completed last August, while harvesting of maize and other spring crops finalized between October and November. The aggregate cereal output is estimated at 1.1 million tonnes, including 840 000 tonnes of wheat, 220 000 tonnes of maize and 150 000 tonnes of barley. The production of all crops is close to the five-year average levels, following overall favourable weather conditions during the season and near-average plantings.

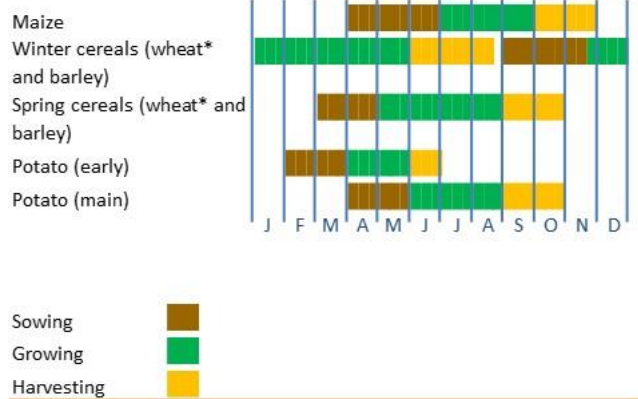
Cereal imports in 2022/23 forecast at near-average level

Imports account for more than half of the domestic consumption needs of cereals and wheat represents more than 90 percent of the cereal imports. Given the favourable 2022 harvest, import requirements of wheat in the 2022/23 marketing year (July/June) are forecast at average level of 1.1 million tonnes. During the last ten years, due to improved local milling capacities, imports of wheat grain have been increasing, while purchases of wheat flour have decreased by almost 90 percent.

Tajikistan

Crop Calendar

(*major foodcrop)



Source: FAO/GIEWS.

Tajikistan

Cereal Production

	2017-2021 average	2021	2022 estimate	change 2022/2021
	000 tonnes			percent
Wheat	843	852	840	-1.4
Maize	222	240	220	-8.4
Barley	151	196	150	-23.5
Others	110	111	116	4.5
Total	1 326	1 399	1 326	-5.2

Note: Percentage change calculated from unrounded data.

Source: FAO/GIEWS Country Cereal Balance Sheet.

Prices of wheat flour higher than year before

National average retail prices of first grade wheat flour increased sharply between February and May 2022, reflecting rising global export quotations and a surge in consumer demand, amidst fears of shortages following the outbreak of the war in Ukraine. Prices declined by 6 percent between June and November, after the harvest of the 2022 wheat crop, but remained well above their levels in November 2021 due to increases in costs of production and transport.

National average prices of potatoes, another important food staple, increased sharply between April and July 2022, and declined afterwards, in line with seasonal trends. In November 2022, they were about 10 percent lower than a year earlier.

GDP growth forecast to slow down further in 2023 due to low remittances inflows

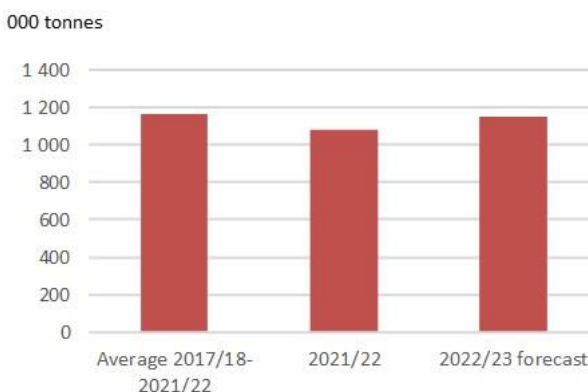
In recent years, remittances accounted for about 30 percent of the country's GDP and their majority originated from the Russian Federation. In 2022, the country experienced a sharp reduction in remittances inflows, mainly due to the international sanctions against the Russian Federation, following the outbreak of the war in Ukraine. The trend is likely to persist in 2023. According to estimates by the International Monetary Fund (IMF), the GDP growth slowed down from 9.2 percent in 2021 to 5.5 percent in 2022 and it is forecast to average 4 percent in 2023.

The international sanctions are causing high unemployment rates and depressing the demand for goods and services in the Russian Federation, reducing work opportunities also for migrants. This situation has a negative impact on the food security situation of households that are highly dependent on remittances.

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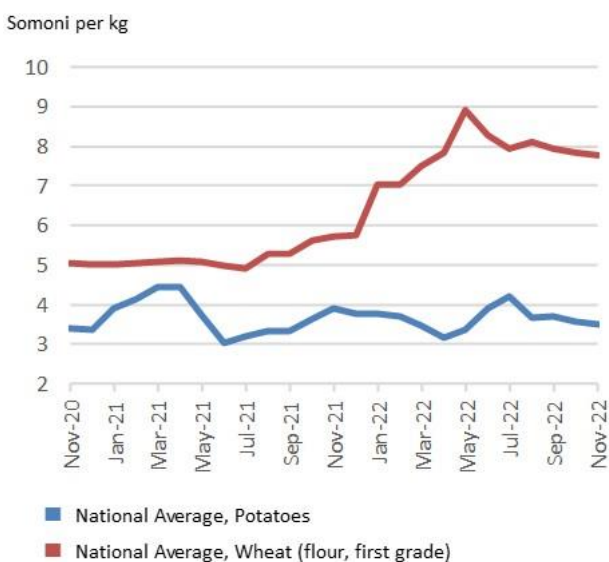
Cereals Imports



Notes: 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.

Tajikistan

Retail prices of wheat flour and potatoes



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



GIEWS Country Brief Tajikistan

Reference Date: 08-June-2022

FOOD SECURITY SNAPSHOT

- **Drier-than-average weather conditions during season affected 2022 winter cereals**
- **Slightly above-average cereal output obtained in 2021**
- **Prices of wheat flour rose sharply in March and April**
- **Expected reduction in remittances inflows in 2022**

Drier-than-average weather conditions affected 2022 winter cereals

Harvesting of the 2022 winter cereal crops (mainly wheat), which were planted between September and mid-November 2021, just started. Below-average precipitation amounts during the season, especially in February and April 2022, negatively affected crop conditions in some areas of the main producing Khatlon Region and Districts of Republican Subordination (DRS) Region (ASI map). As a result, yields of winter cereals are expected at slightly below-average levels.

Planting of the 2022 spring wheat and barley crops, to be harvested from September, finalized in April, while planting of the 2022 maize crop, for harvest in October, is ongoing under overall favourable weather conditions.

Slightly above-average cereal output obtained in 2021

Harvesting of the 2021 cereal crops was completed last November. According to the Crop and Food Security Assessment Mission (CFSAM) carried out by FAO and WFP with technical support by the Ministry of Agriculture (MoA) and the Agency on Statistics (AoS) under the President of the Republic of Tajikistan ([full report](#)), the 2021 aggregate cereal output is estimated at 1.4 million tonnes, 7 percent above the five-year average level. Production of wheat is set at a near-average level of 852 000 tonnes, while the outputs of maize and barley are estimated at 240 000 tonnes and 196 000 tonnes, respectively, well above the average levels.

Prices of wheat flour rose sharply in March and April




Retail prices of first grade wheat flour increased sharply between February and April 2022, reaching levels of over 30 percent higher than a year before. The high domestic prices reflect the

Tajikistan

Crop Calendar

(*major foodcrop)

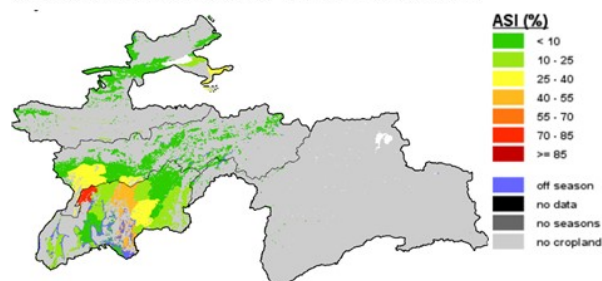


Sowing 
Growing 
Harvesting 

Source: FAO/GIEWS.

Tajikistan - Agricultural Stress Index (ASI)

from start of season 1 to dekad 2, May 2022



Source: FAO/GIEWS Earth Observation System.

elevated international wheat export quotations amid the outbreak of the war in Ukraine and the introduction of export bans and quotas in several countries in the subregion, including Kazakhstan, the main wheat exporter to the country ([FPMA Policies](#)).

In April, prices of potatoes, another important food staple, declined by 15 percent on average since February 2022 and they were about 30 percent lower than a year earlier, reflecting a year-on-year larger domestic production.

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. Sanctions are expected to result in high unemployment rates and to negatively affect demand for goods and services in the Russian Federation, reducing work opportunities also for migrants. As a result, the food security situation of households that are highly dependent on remittances will likely deteriorate.

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Cereal Production

	2016-2020	2020	2021	change
	average		estimate	2021/2020
000 tonnes				
				percent
Wheat	856	846	852	0.8
Maize	216	182	240	32.1
Barley	140	150	196	31.0
Others	110	110	111	0.9
Total	1 321	1 287	1 399	8.7

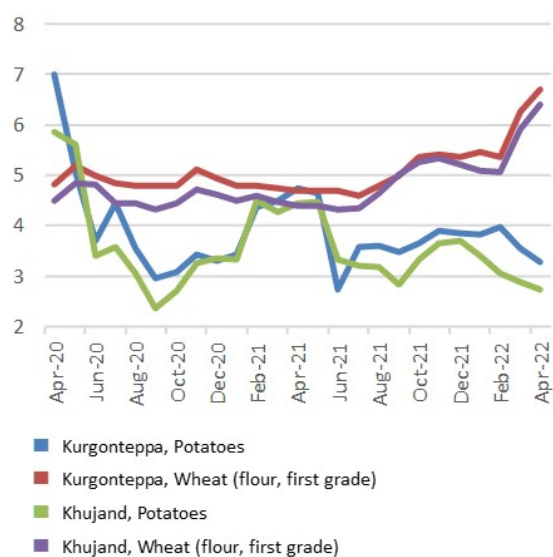
Note: Percentage change calculated from unrounded data.

Source: FAO/GIEWS Country Cereal Balance Sheet.

Tajikistan

Retail prices of wheat flour and potatoes

Somoni per kg



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



GIEWS Country Brief Tajikistan

Reference Date: 24-May-2021

FOOD SECURITY SNAPSHOT

- Overall favourable weather conditions for 2021 winter cereals
- Near-average cereal output obtained in 2020
- Prices of wheat flour in April near or below year-before levels

Overall favourable weather conditions for 2021 winter cereals

Harvesting of the 2021 winter cereal crops (mainly wheat), which were planted between September and mid-November 2020, will begin in June. Weather conditions have been overall favourable during the season, resulting in near-average vegetation conditions in most crop lands (see ASI map). On 11 May 2021, heavy rains triggered flooding and landslides in some areas of the main cereal-producing Khatlon Region, with damages to standing crops, roads and buildings.

Planting of the 2021 spring wheat and spring barley crops, to be harvested from September, was completed in April under overall beneficial weather conditions. Planting of the 2021 maize crop is ongoing and the harvest is expected to begin in October.

Near-average cereal output obtained in 2020

Harvesting of the 2020 cereal crops was completed last November. According to the Crop and Food Security Assessment Mission (CFSAM) carried out by FAO, WFP, the Ministry of Agriculture (MoA) and the Agency for Statistics (AoS) under the President of the Republic of Tajikistan (see [full report](#) on GIEWS website), the 2020 aggregate cereal output is estimated at a near-average level of 1.3 million tonnes. Production of wheat is set at a near-average level of 846 000 tonnes, while the output of barley is estimated at 150 000 tonnes, about 10 percent above the average level and production of maize is set at 182 000 tonnes, 10 percent below average.

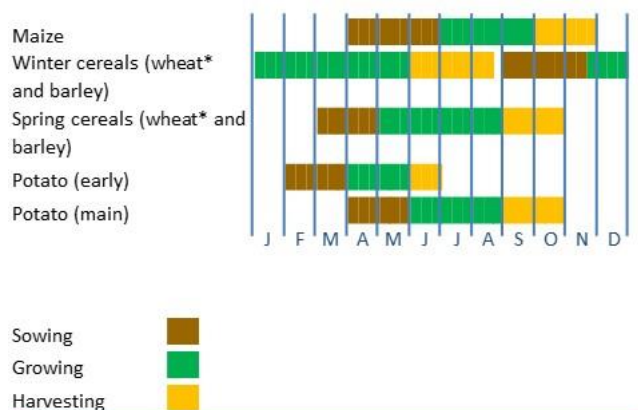
Prices of wheat flour in April remained at generally high levels

Retail prices of first grade wheat flour, despite declining between November 2020 and April 2021, remained around the generally high levels reached after rising between March and May 2020, in response to a spike in consumer demand triggered by the COVID-19 pandemic, but also supported by the depreciation of the local currency.

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Crop Calendar

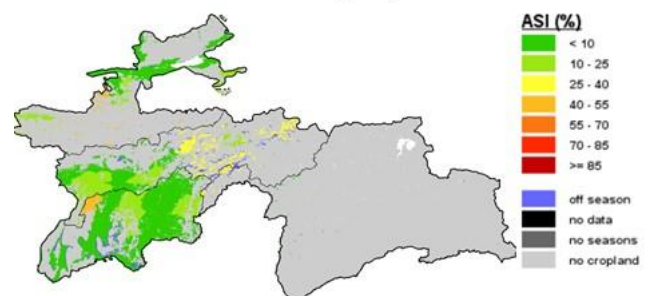
(*major foodcrop)



Source: FAO/GIEWS.

Tajikistan - Agricultural Stress Index (ASI)

from start of season 1 to dekad 1, May 2021



Source: FAO/GIEWS Earth Observation System.

Prices of potatoes, another important food staple, have been following an overall increasing trend since September 2020, in line with the seasonal tendency, but in April 2021 were well below the record levels of the corresponding month a year before.

Tajikistan

Cereal Production

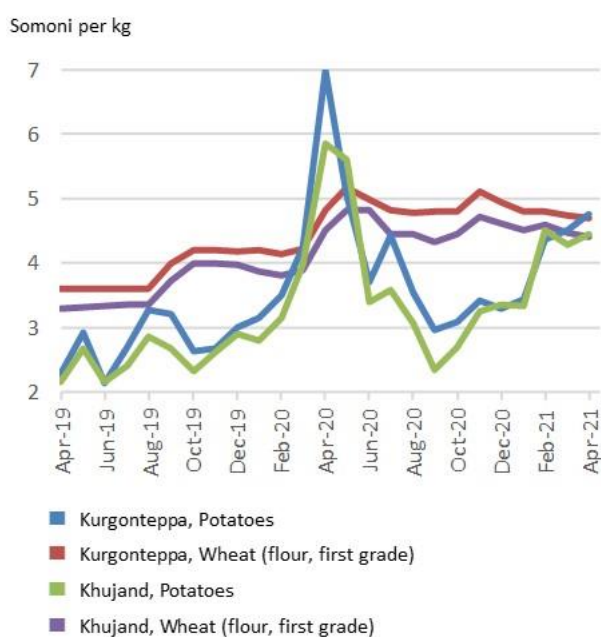
	2015-2019 average	2019	2020 estimate	change 2020/2019
	000 tonnes			percent
Wheat	866	837	846	1.0
Maize	219	233	182	-21.9
Barley	138	156	150	-4.2
Others	107	118	110	-6.9
Total	1 330	1 344	1 287	-4.3

Note: percentage change calculated from unrounded data.

Source: FAO/GIEWS Country Cereal Balance Sheet.

Tajikistan

Retail prices of wheat flour and potatoes



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



GIEWS Country Brief Tajikistan

Reference Date: 27-January-2021

FOOD SECURITY SNAPSHOT

- Cereal output in 2020 estimated at near-average level
- Prices of wheat flour increased in November 2020, reaching year on year higher levels

Cereal output in 2020 estimated at near-average level

Harvesting of the 2020 winter cereals was completed in August last year, while harvesting of spring crops finalized in October. According to the preliminary results of an Assessment Mission carried out by FAO, the Ministry of Agriculture (MoA) and the Agency on Statistics (AoS) under the President of the Republic of Tajikistan, the 2020 aggregate cereal output is estimated at a near-average level of about 1.3 million tonnes. Production of wheat is set at a near-average level of 846 000 tonnes, while the output of barley is estimated at 150 000 tonnes, about 10 percent above the average level and production of maize is set at 182 000 tonnes, 10 percent below average.

Planting of the 2021 winter cereal crops (mainly wheat) took place between September and mid-November 2020 and crops will be harvested from June. Weather conditions were overall favourable during planting, except in some areas, due to excessive rain and early snowfalls.

Prices of wheat flour increased in November 2020, reaching year on year higher levels

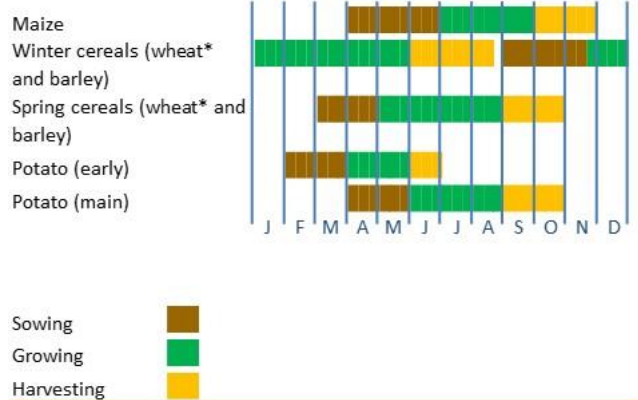
Retail prices of first grade wheat flour, after remaining relatively stable between June and October 2020, increased in November, with seasonal trends exacerbated by the depreciation of the national currency. Although prices declined in December, they remained well above the levels of a year before, with the latest upward movements compounding the steep increases recorded between March and May 2020 due to an upsurge in consumer demand amid concerns over the COVID-19 pandemic, market disruptions and export restrictions in Kazakhstan, the country's key supplier. A year on year weaker national currency, which lost 17 percent of its value against the US dollar during 2020, also supported the strong yearly increase in prices.

Prices of potatoes, another important food staple, increased from November 2019 to April 2020. Prices increased particularly in March and April 2020 due to the strong demand by local

Tajikistan

Crop Calendar

(*major foodcrop)



Source: FAO/GIEWS.

Tajikistan

Cereal Production

	2015-2019 average	2019	2020 estimate	change 2020/2019 percent
	000 tonnes			
Wheat	866	837	846	1.0
Maize	208	175	182	3.9
Barley	137	150	150	-0.3
Others	103	100	101	1.2
Total	1 314	1 262	1 278	1.3

Note: percentage change calculated from unrounded data.

Source: FAO/GIEWS Country Cereal Balance Sheet.

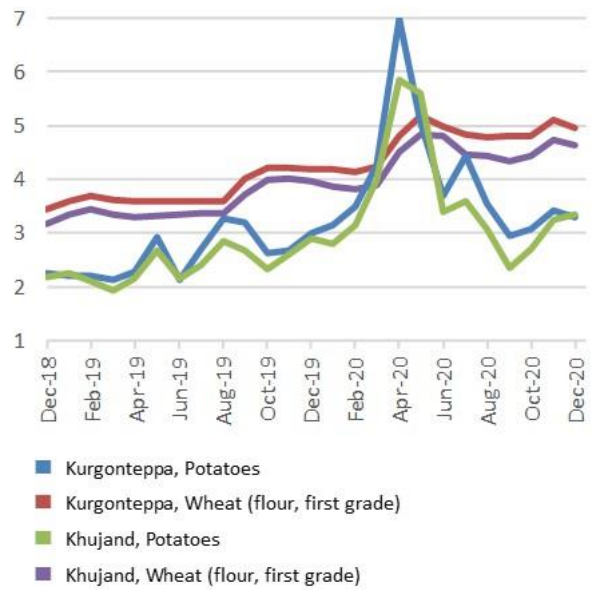
consumers, fearing supply shortages due to the pandemic. Prices showed an overall decreasing trend between April and September and increased in the following two months, reaching, in December 2020, levels above those a year before.

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Tajikistan

Retail prices of wheat flour and potatoes

Somoni per kg



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



GIEWS Country Brief Tajikistan

Reference Date: 07-May-2020

FOOD SECURITY SNAPSHOT

- Favourable conditions of 2020 winter cereal crops
- Cereal output in 2019 estimated at near-average level
- Cereal imports in 2019/20 forecast near-average level
- Prices of wheat flour and potatoes increased in March amid strong demand due to COVID-19 concerns

Favourable conditions of 2020 winter cereal crops

Planting of the 2020 winter cereals, mainly wheat, finalized in mid-November and crops will be harvested from June. Weather conditions have been overall favourable throughout the season and, based on remote sensing analysis and information (see ASI map), vegetation conditions in late April were good across the crop lands.

Planting of the 2020 spring crops, to be harvested from August, is ongoing under favourable weather conditions and it is expected to finalize by end-June.

Cereal output in 2019 estimated at near-average level

Harvesting of the 2019 cereal crops was completed in September last year, under favourable weather conditions. The aggregate cereal output, mainly wheat, is estimated at a near-average level of 1.24 million tonnes. Production of wheat in 2019 is set at 830 000 tonnes, just below the five-year average level, on account of a slightly below-average area planted. Maize output is estimated at 175 000 tonnes, about 15 percent below the average value, mainly due to reduced plantings.

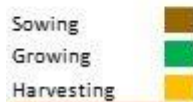
Cereal imports in 2019/20 forecast at near-average level

Imports account for more than half of the domestic consumption needs of cereals and wheat represents more than 90 percent of the cereal imports.

Given the overall favourable output of the 2019 harvest, import requirements of wheat in the 2019/20 marketing year (July/June) are forecast at 1.1 million tonnes, close to the five-year average level. During the last ten years, due to improved local milling

Tajikistan

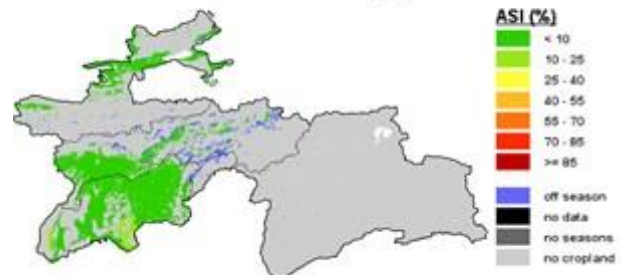
Crop Calendar (*major foodcrop)



Source: FAO/GIEWS.

Tajikistan - Agricultural Stress Index (ASI)¹

from start of season 1 to dekad 2, April 2020



Source: FAO/GIEWS Earth Observation System.

Tajikistan

Cereal Production

	2014-2018	2018	2019	change
	average			
000 tonnes				
				percent
Wheat	872	779	830	6.5
Maize	212	237	175	-26.3
Barley	130	109	130	19.5
Others	100	103	106	2.9
Total	1 313	1 228	1 241	1.0

Note: percentage change calculated from unrounded data.

Source: FAO/GIEWS Country Cereal Balance Sheet.

capacities, imports of wheat grain have been increasing, while purchases of wheat flour have decreased by almost 90 percent.

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

Retail prices of wheat flour, which remained overall stable between November 2019 and February 2020, moderately rose in March, due to increased consumer demand amid concerns over the COVID-19 epidemic and [export limitations imposed by the Government of Kazakhstan](#), the country's main wheat supplier.

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

COVID-19 and measures adopted by the Government

In response to the COVID-19 pandemic, the Government adopted a series of preventive [measures](#) including the closure of borders and schools, and the cancellation of all public events.

On 2 April 2020, the World Bank approved a USD 11.3 million [grant](#) to finance the Tajikistan Emergency COVID-19 Project, which is aimed at supporting the country's efforts to prepare for, and effectively respond to, the health and social risks associated with the pandemic. The Project includes measures to support the most vulnerable households, such as emergency cash transfers to food insecure families unable to cope with rising food prices.

On 5 April 2020, the Government issued the COVID-19 Country Preparedness and Response Plan and the Action Plan for preventing and reducing the national economy's exposure to potential risks of COVID-19, which includes measures to ensure macro-economic stability, improvement of the banking system, efficient use of national budget funds and targeted social payments to vulnerable households.

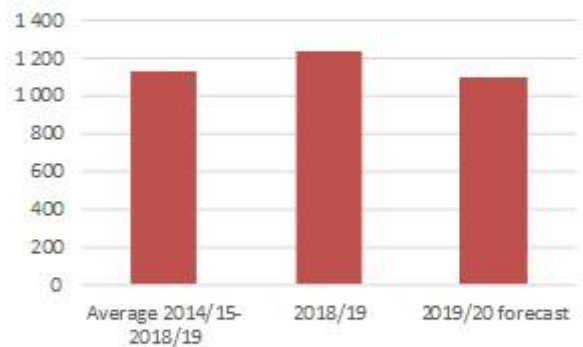
On 25 April 2020, the Government introduced a temporary [export ban](#) on a number of food staples, including wheat grain and wheat flour, legumes, rice, eggs, potatoes and all kinds of meat. The ban is meant to ensure adequate domestic supplies and curb price increases.

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Tajikistan

Cereals Imports

000 tonnes



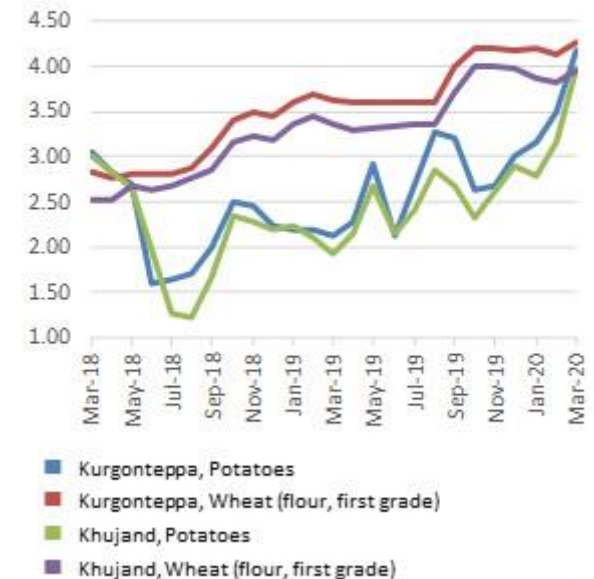
Note: Includes rice in milled terms. Split year refers to individual crop marketing years (for rice, calendar year of second year shown).

Source: FAO/GIEWS Country Cereal Balance Sheets.

Tajikistan

Retail prices of wheat flour and potatoes

Somoni per kg



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



GIEWS Country Brief Tajikistan

Reference Date: 04-October-2019

FOOD SECURITY SNAPSHOT

- Cereals output estimated at near-average level in 2019
- Near-average cereal imports forecast in 2019/20
- Prices of wheat flour increased in September

Cereals output estimated at near-average level in 2019

Harvesting of the 2019 winter and spring crops was completed in late August and end-September, respectively, under favourable weather conditions. The aggregate cereals output, mainly wheat, is estimated at near average 1.25 million tonnes. Production of wheat in 2019 is set at 830 000 tonnes, just above the five-year average, on account of adequate and well-distributed precipitation during the season. By contrast, maize output is estimated at 175 000 tonnes, about 10 percent below the average level due to a below-average area planted.

Sowing of the 2020 winter crops is ongoing under favourable weather conditions and it is expected to finalize by late November.

Near-average cereal imports forecast in 2019/20

The country relies heavily on imports to meet its cereal consumption needs and wheat represents more than 90 percent of the cereal imports.

Given the favourable output of the 2019 harvest, import requirements of cereals in the 2019/20 marketing year (July/June) are forecast at 1.1 million tonnes, close to the five-year average level. Due to improved local milling capacities, imports of wheat grain have been increasing, while purchases of wheat flour have decreased by almost 90 percent during the last ten years.

Prices of wheat flour increased in September

Retail prices of wheat flour remained virtually unchanged between April and August 2019, amid stable export quotations from Kazakhstan, the main wheat grain and wheat flour supplier to the country. Prices of wheat flour seasonally increased in September by about 8 percent.

Tajikistan

Crop Calendar

(*major foodcrop)

Coarse Grains (Spring)

Wheat (Winter)*



Sowing

Growing

Harvesting

Source: FAO/GIEWS.

Tajikistan

Cereal Production

	2014-2018 average	2018	2019 estimate	change 2019/2018
	000 tonnes			percent
Wheat	856	700	830	18.6
Maize	194	147	175	19.0
Barley	136	140	142	1.4
Others	100	103	106	2.9
Total	1 286	1 090	1 253	15.0

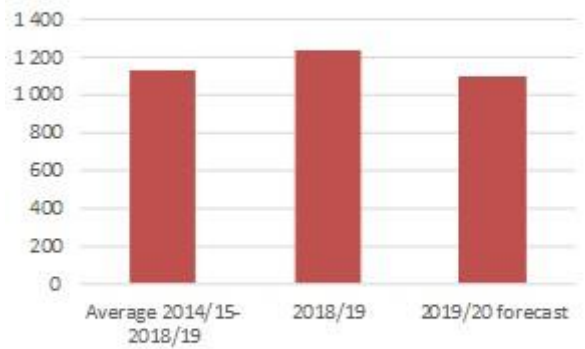
Note: percentage change calculated from unrounded data.

Source: FAO/GIEWS Country Cereal Balance Sheet.

Tajikistan

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.

Tajikistan

Retail prices of wheat flour

Somoni per kg



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

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GIEWS Country Brief Tajikistan

Reference Date: 12-March-2019

FOOD SECURITY SNAPSHOT

- Favourable conditions of 2019 wheat crops
- Weather-reduced yields of cereals in 2018
- Above-average wheat imports forecast in 2018/19
- Prices of wheat flour increased in February

Favourable conditions of 2019 wheat crops

Conditions of the 2019 winter wheat crops, to be harvested between July and August, are reported to be favourable. Planting was completed by mid-November 2018 and, since then, precipitations were adequate over the main crop producing areas in the southwestern provinces of the country, contributing to the filling of water reserves to be used during the summer period (June-August). However, due to above average humidity levels, there is a possibility that fungal diseases, such as rust and root rot will develop, negatively affecting crop conditions.

Spring crops, to be harvested in August-September 2019, will be planted between April and June.

Weather-reduced yields of cereals in 2018

Harvesting of the 2018 cereal crops finalized by the end of September last year and aggregate production is estimated at about 1.1 million tonnes, 20 percent below the previous year's average level and a seven-year low. The decrease is mainly due to a well below-average wheat output, set at about 700 000 tonnes. Similarly, maize output is estimated at 26 percent below the five-year average, at 147 000 tonnes. The reduced outputs are mainly due to unfavourable weather conditions between February and May 2018, which had a negative impact on yields.

Above-average wheat imports forecast in 2018/19

In the 2018/19 marketing year (July/June), import requirements of cereals, mainly wheat, are forecast at 1.2 million tonnes, 13 percent above the five-year average level, reflecting reduced domestic production. Purchases of wheat grain are expected at about 20 percent above the average volume, while, due to increased local milling capacities over the last years, imports of wheat flour are forecast to decline. Wheat flour imports decreased by almost 90 percent in the last ten years.

Tajikistan

Crop Calendar

(*major foodcrop)

Coarse Grains (Spring)

Wheat (Winter)*



Sowing

Growing

Harvesting

Source: FAO/GIEWS.

Tajikistan

Cereal Production

	2013-2017 average	2017	2018 estimate	change 2018/2017
	000 tonnes			percent
Wheat	906	900	700	-22.2
Maize	199	218	147	-32.7
Barley	133	146	140	-3.9
Others	98	109	111	1.8
Total	1 336	1 373	1 098	-20.0

Note: percentage change calculated from unrounded data.

Source: FAO/GIEWS Country Cereal Balance Sheet.

Prices of wheat flour increased in February

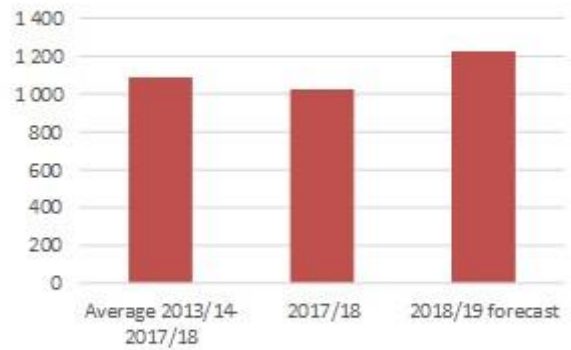
Retail prices of wheat flour rose sharply from August 2018 onwards and, in February 2019, they were on average 20 percent higher than a year before. The increase mainly reflects the upward trend of wheat export prices from Kazakhstan, the main wheat grain and wheat flour supplier to the country, a reduced domestic harvest in 2018 and the weakening of the local currency.

Prices of potatoes, another staple food in the country, after a slight increase in January 2019 decreased in February to levels well below those in the previous year.

Tajikistan

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.

Tajikistan

Retail prices of wheat flour

Somoni per kg



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

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GIEWS Country Brief Tajikistan

Reference Date: 02-October-2018

FOOD SECURITY SNAPSHOT

- Total cereal production in 2018 estimated below five-year average
- Wheat imports in 2018/19 marketing year forecast to increase to above average levels
- Prices of wheat flour remained close to their year ago values

Total cereal production in 2018 estimated below-average

The 2018 harvest of winter cereals was finalized by the end of August, while spring cereals are currently being harvested. The below-average level of precipitation during the winter and spring periods had negatively affected yields of rainfed crops, which led to a 20 percent decline in total cereal production. As a result, aggregate cereal production is estimated at 1.1 million tonnes, well below the five-year average and the lowest level since 2011. The anticipated decline rests on expectations of lower wheat output, which is set at 700 000 tonnes, about 22 percent below the 2017 level and a ten-year low.

Planting of winter cereals (mainly wheat) for harvest in 2019 started at the end of August under generally favourable weather conditions.

Wheat imports forecast to be above average in 2018/19 marketing year (July/June)

Total cereal import requirements are forecast at 1.23 million tonnes in the 2018/19 marketing year (July/June), about 20 percent up the low level of the previous year and above the average level of recent years, reflecting below-average domestic production. Wheat purchases, which account for the majority of the total cereal imports, are expected at 1.2 million tonnes, well above the five-year average.

Prices of wheat flour remained close to their year ago values

Prices of wheat flour rose since June, mainly due to a reduction in the 2018 domestic output and a weakening of the national currency. However, in September 2018, prices were still close to their values of a year before, reflecting stable export prices from Kazakhstan and increased availability of relatively cheap locally produced wheat flour. The country has been increasing its milling capacity over the last years, decreasing the share of imported

Tajikistan



Source: FAO/GIEWS.

Tajikistan

Cereal Production

	2013-2017	2017	2018	change
	average		forecast	2018/2017
000 tonnes				
Wheat	906	900	700	-22.2
Maize	199	218	147	-32.7
Others	98	106	108	2.1
Total	1 332	1 351	1 086	-19.6

Note: percentage change calculated from unrounded data.

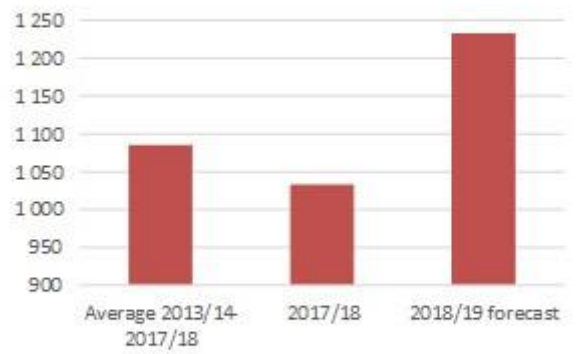
Source: FAO/GIEWS Country Cereal Balance Sheet.

wheat flour compared to wheat grain in total imports. The share of wheat flour declined from 70 percent in 2006/07 to less than 10 percent in the 2017/18 marketing year.

Tajikistan

Cereals Imports

000 tonnes



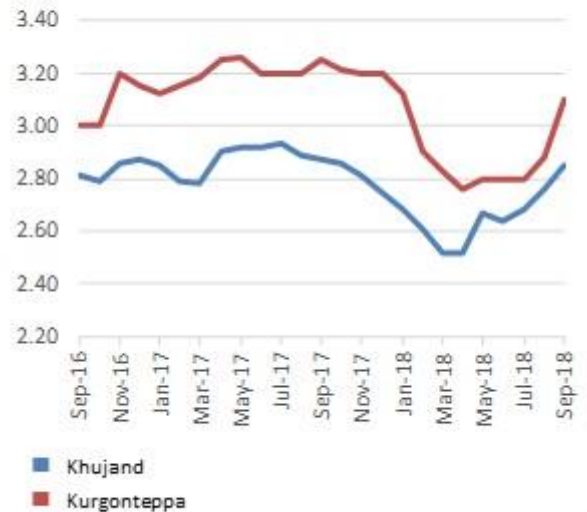
Note: Includes rice in milled terms. Split year refers to individual crop marketing years (for rice, calendar year of second year shown).

Source: FAO/GIEWS Country Cereal Balance Sheets.

Tajikistan

Retail prices of wheat flour

Somoni per kg



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

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GIEWS Country Brief Tajikistan

Reference Date: 14-September-2017

FOOD SECURITY SNAPSHOT

- Total cereal production in 2017 estimated close to last five-year average
- Wheat imports in 2017/18 marketing year forecast to decline from previous year
- Prices of wheat flour remained stable in August

Total cereal production in 2017 estimated close to average

Harvesting of the 2017 spring cereal crops, mainly wheat, maize and barley, is about to be completed. The 2017 wheat production is estimated at 850 000 tonnes, about 7 percent above last year's below-average level. The expected increase is mainly due to adequate precipitations during the season. More than 40 percent of the total wheat production depends on rainfall, while the rest of the wheat area is irrigated.

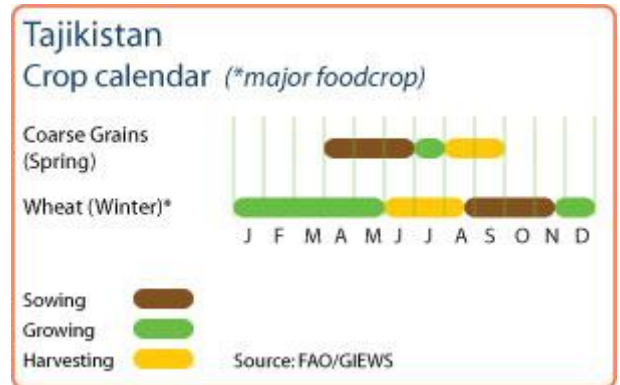
Production of maize and barley are forecast at average levels. Planting of the winter wheat crop, to be harvested in June 2018, started at the end of August under favourable weather conditions.

Wheat imports forecast to decline in 2017/18 marketing year (July/June)

Wheat imports (wheat and wheat flour in grain equivalent) in the 2017/18 marketing year (July/June) are forecast at around 1 million tonnes, 11 percent below the previous season's level, as production prospects of the current harvest are generally favourable. In total imports, the share of wheat flour continues to decline in favour of wheat grain as the country's grain-processing capacity is strengthening. The share of wheat flour went down from 70 percent in 2006/07 to 10 percent in the 2016/17 marketing year.

Weak local currency continues to support prices of wheat flour

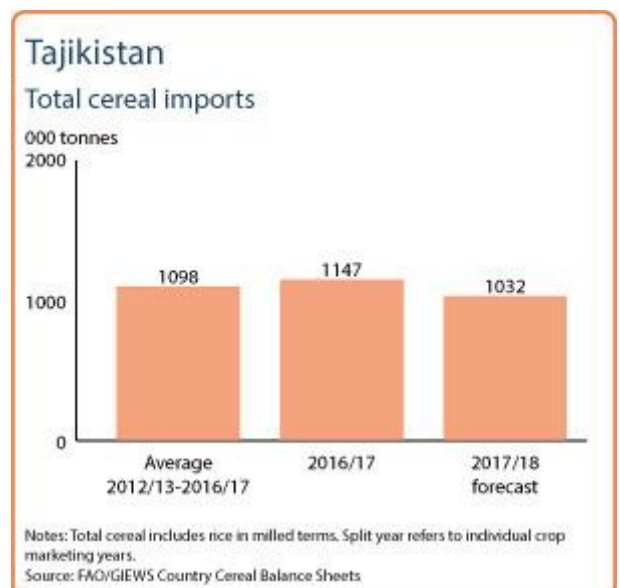
Prices of wheat flour remained virtually unchanged in August and were higher than a year earlier, mainly as a result of the weak local currency and high fuel costs, which were around 20 percent higher year-on-year. Prices of potatoes, another important staple in the country, were well above their levels in August last year following concerns over reduced availabilities of a high quality crop in the export markets.



Tajikistan
Cereal production

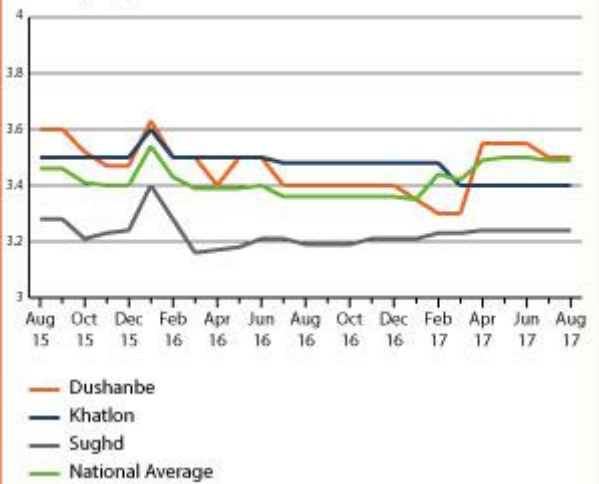
	2012-2016 average	2016	2017 estimate	change 2017/2016
	000 tonnes		percent	
Wheat	848	793	850	7
Maize	110	150	116	-23
Barley	101	110	104	-5
Others	92	92	93	1
Total	1 150	1 145	1 163	2

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



Retail prices of wheat flour in Tajikistan

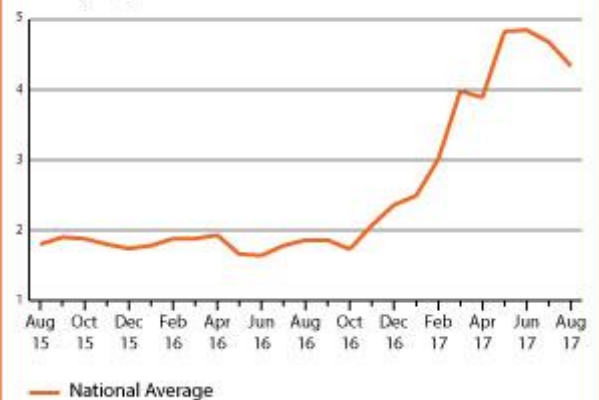
Somoni per Kg



Source: Statistical Agency under President of the Republic of Tajikistan

Tajikistan Retail prices of potatoes

Somoni per Kg



Source: Statistical Agency under President of the Republic of Tajikistan

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GIEWS Country Brief Tajikistan

Reference Date: 12-April-2017

FOOD SECURITY SNAPSHOT

- Early forecast points to increase in 2017 cereal production
- Wheat imports in 2017/18 marketing year forecast at below-average level
- Prices of wheat flour declined in February

Favourable weather during spring contributed to increase forecast for 2017 cereal production

According to remote sensing data and analysis, favourable weather conditions prevailed during February-March. Above-average precipitation had a positive impact on vegetation conditions (see Agricultural Stress Index map). Consequently, aggregate cereal production in 2017 (including a forecast for spring coarse grains to be harvested by August) is preliminarily set at 1.2 million tonnes, about 7 percent above the previous year's level. In particular, wheat output is expected to increase by 16 percent from the lower-than-average production obtained in 2016.

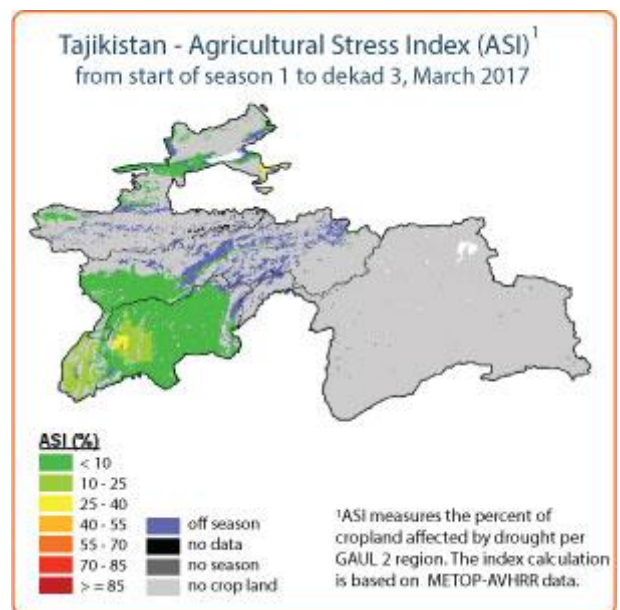
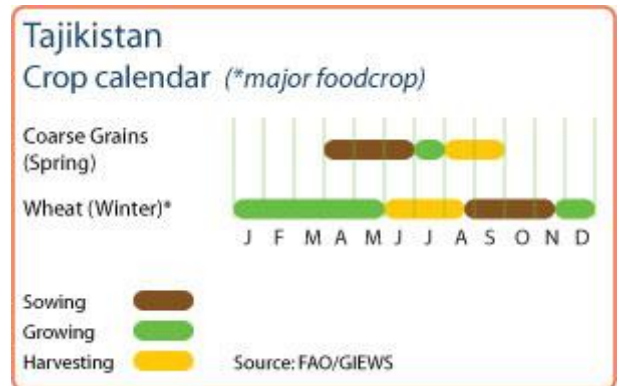
Planting of the maize crop has just started and, assuming an average planted area and yields, production is tentatively forecast at about 116 000 tonnes.

Below-average wheat imports in 2017/18 marketing year

The country depends heavily on imports to meet its cereal consumption needs and wheat represents more than 90 percent of the cereal imports.

Despite the favourable prospects for the current harvest, wheat purchases are expected to increase to replenish the low carryover stocks. Wheat imports in the 2017/18 marketing year (July/June) are forecast at 1 million tonnes, 11 percent higher than the previous season's level, but well below the average level of the previous five years.

Following a strengthening of the national grain processing capacity, the country continues to decrease the share of wheat flour in total imports in favour of wheat grain.



Weak local currency continues to support prices of imported food commodities

Prices of wheat flour continued to decline in February and were 7 percent below the record highs of January 2016, reflecting the adequate supply of wheat in the country.

The downward price pressure has, however, been limited by the weak national currency, which has underpinned prices of several imported goods. The local currency depreciated steadily against the US dollar from mid-August 2015. In February 2016, the National Bank of Tajikistan intervened to support the currency, but this measure had limited effects.

Tajikistan

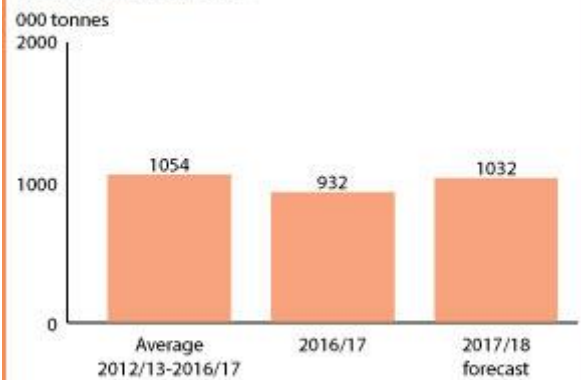
Cereal production

	2012-2016 average	2016	2017 forecast	change 2017/2016
	000 tonnes			percent
Wheat	848	793	916	16
Maize	110	150	116	-23
Barley	101	110	104	-5
Others	91	92	87	-5
Total	1 149	1 145	1 223	7

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

Tajikistan

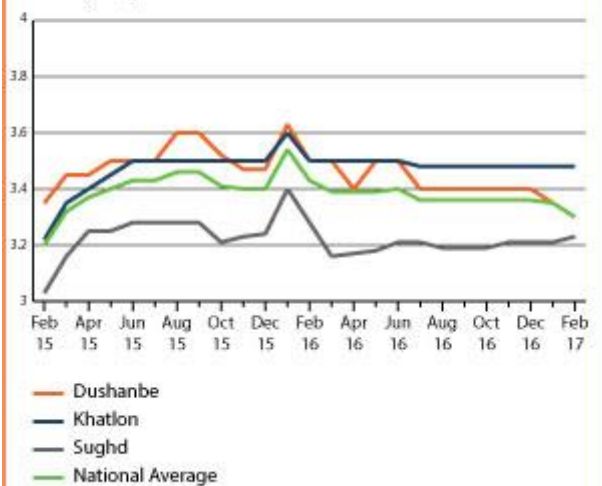
Total cereal imports



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

Retail prices of wheat flour in Tajikistan

Somoni per Kg



Source: Statistical Agency under President of the Republic of Tajikistan



GIEWS Country Brief Tajikistan

Reference Date: 21-July-2016

FOOD SECURITY SNAPSHOT

- Early forecast points to small decline in 2016 cereal production
- Wheat imports in 2015/16 marketing year forecast similar to previous year's level
- Weak local currency supports prices of imported goods

Favourable weather during spring contributed to record crop in 2016

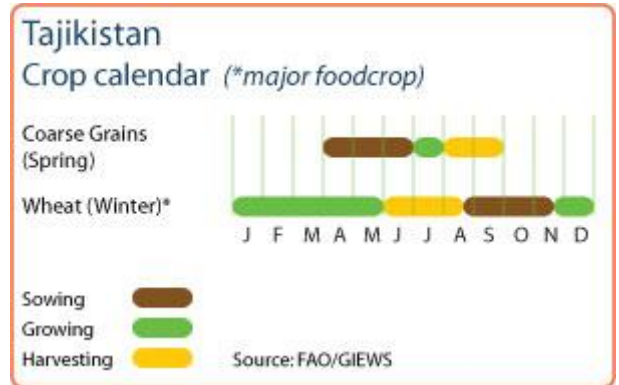
FAO's latest forecast for aggregate cereal production indicates a record crop this year. Despite lower-than-average precipitation and unusually warm weather during the winter, abundant rainfall during the spring restored soil moisture reserves and helped crop development. Favourable weather conditions resulted in high yields, which together with some expansion of plantings, led to a 19 percent year-on-year increase in production, now forecast at 1.35 million tonnes. Most of the growth is expected on account of increased wheat and maize crops. Wheat production is estimated at 1 million tonnes, 18 percent up from 2015 and sufficient to cover about 50 percent of total domestic needs. Maize production is forecast to increase by 50 percent to 150 000 tonnes, largely due to a larger planted area.

Wheat imports to fall in 2016/17 marketing year

Tajikistan depends heavily on imports to meet its cereal consumption needs and more than 90 percent of imports are wheat. Per capita consumption in the country is around 183 kg/year, one of the highest in the region. Wheat imports in the 2016/17 marketing year (July/June) are forecast at 900 000 tonnes, 15 percent below the previous year's level due to bumper domestic production in 2016. Following a strengthening of the national grain processing capacity, the country continues to decrease the share of wheat flour and increase the share of wheat grain in total imports.

Weak local currency continues to support prices of imported foods

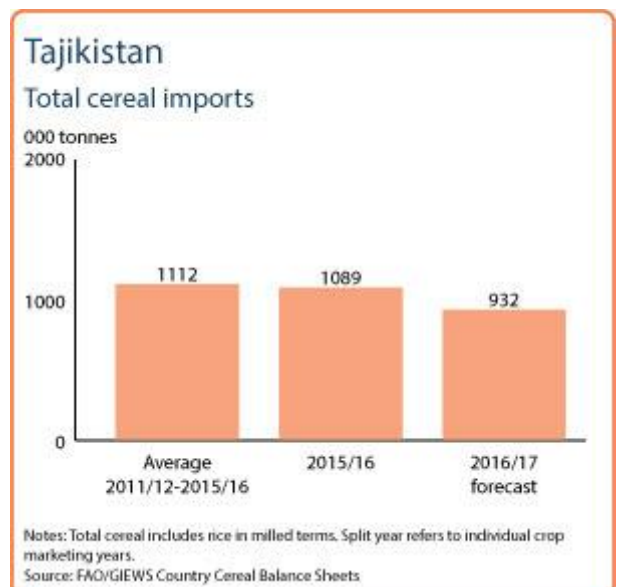
Prices of wheat flour came down in the first half of the year from the record highs of January, reflecting adequate and low-priced wheat imports, despite some recent increases in export prices from Kazakhstan (the country's main supplier). Downward price pressure has, however, been limited by the weak national currency, which has underpinned prices of several imported



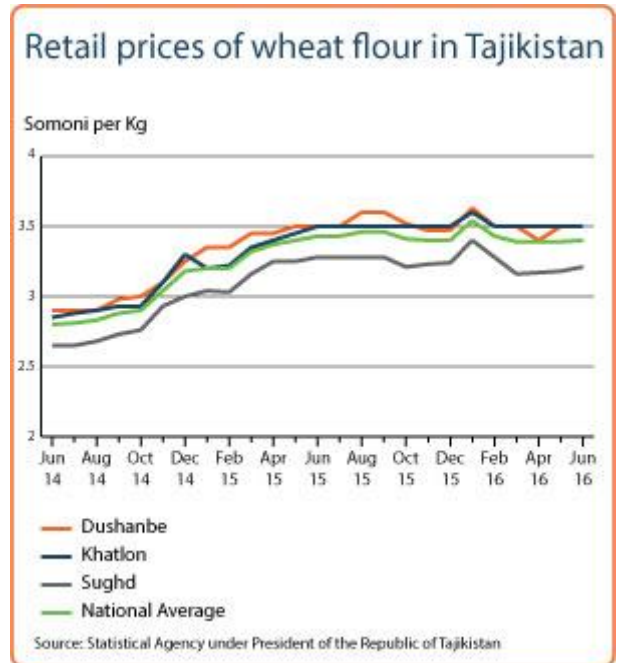
Tajikistan
Cereal production

	2011-2015 average	2015	2016 forecast	change 2016/2015
	000 tonnes			percent
Wheat	834	850	1,000	18
Maize	102	100	150	50
Barley	94	100	110	10
Others	90	90	92	2
Total	1,120	1,140	1,352	19

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



goods, including wheat flour, vegetable oil and sugar. The Somoni depreciated steadily against the US dollar from mid-August 2015 through to late January this year. Since February, the currency has remained relatively stable against the US dollar, after the National Bank of Tajikistan (NBT) intervened to support the currency.



Reference Date: 31-March-2016

FOOD SECURITY SNAPSHOT

- Early forecast points to small decline in 2016 cereal production
- Cereal production declined slightly in 2015
- Wheat imports in 2015/16 marketing year are forecast similar to previous year's level
- Prices of wheat flour hit new record levels in January

Early forecast points to small decline in 2016 cereal production

Lower-than-average precipitation and unusually warm weather during the winter raised some concerns during the past months for this year's winter wheat crop prospects. However, recent remote sensing data shows that vegetation conditions in most of the country are normal or above average for this stage of the season, indicating that soil moisture reserves have been adequate for vegetative development of crops that have come out of dormancy earlier than normal with the warmer temperatures. Planting of the 2016 spring cereal crops will start in April.

Cereal production declined slightly in 2015

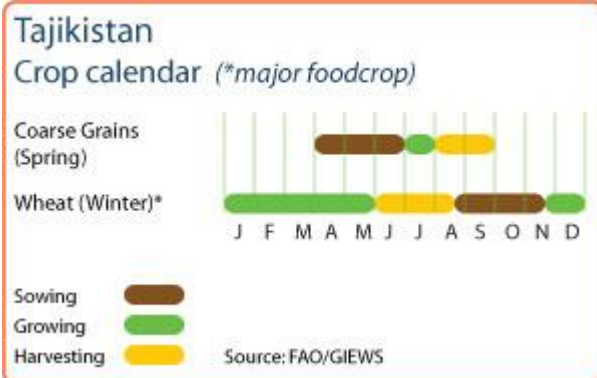
FAO's estimate puts 2015 cereal production at 1.2 million tonnes, around 2 percent less than in the previous year but still above the five-year average. Aggregate wheat production is estimated at 850 000 tonnes, slightly below the 2014 above-average level. Maize production is estimated at 100 000 tonnes, unchanged from the previous year.

Wheat imports in 2015/16 marketing year are forecast similar to previous year's level

Tajikistan depends heavily on imports to meet its cereal consumption needs and the bulk of it is wheat, which accounts for about 85 percent of domestic cereal utilization. Wheat and barley is mainly imported from Kazakhstan, while rice is largely sourced from the Russian Federation. Wheat imports in the 2015/16 marketing year (July/June) are forecast at 1.1 million tonnes, slightly above last year's level. However, the structure of wheat imports has been changing over the last years. Due to increased grain processing capacity inside the country, the Government has been decreasing the share of wheat flour and increasing the share of wheat grain in total imports. In 2015/16, the share of wheat grain is expected to be around 84 percent.

Prices of wheat flour hit new record levels in January

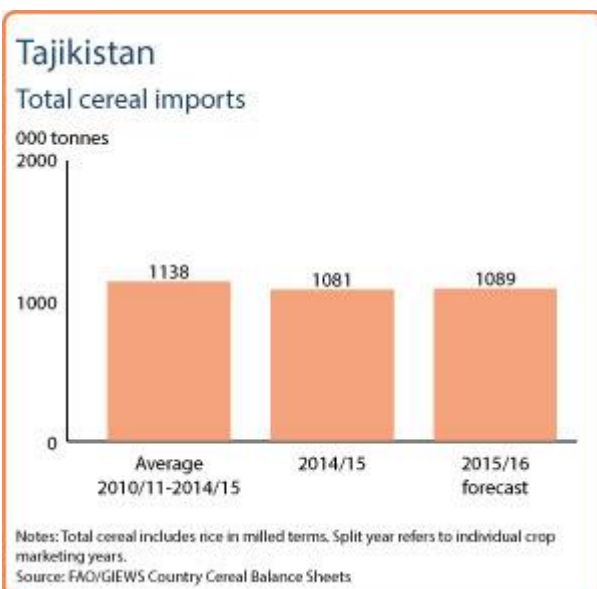
Prices of wheat flour reached a record in January 2016 due to the persistent depreciation of the local currency, which lost around one-third of its value against the US dollar in the past year, sharply increasing prices of imported goods. However, in February, prices eased down by about 3 percent from January's record level reflecting decreased wheat export quotations from Kazakhstan. Prices of potatoes, another important staple, increased in February although they remained more than 30 percent below their exceptionally high levels a year earlier.



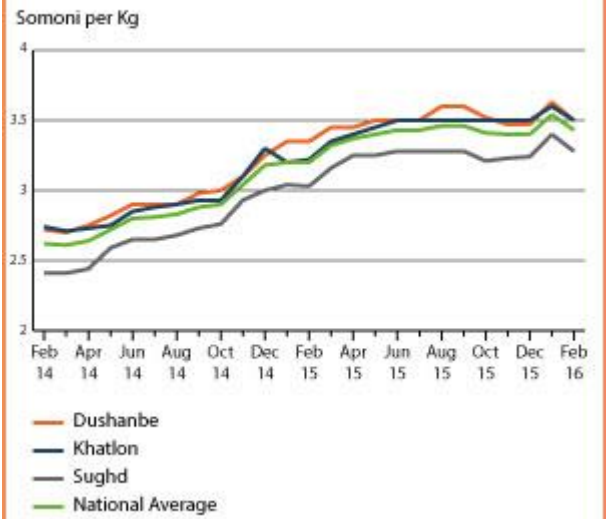
Tajikistan Cereal production

	2010-2014 average	2014	2015 estimate	change 2015/2014
	000 tonnes		percent	
Wheat	834	868	850	-2
Barley	116	150	150	0
Maize	107	100	100	0
Others	89	90	91	1
Total	1 146	1 208	1 191	-1

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



Retail prices of wheat flour in Tajikistan



Reference Date: 19-January-2015

FOOD SECURITY SNAPSHOT

- **Aggregate cereal production in 2014 declined from last year's level**
- **Wheat imports in 2014/15 marketing year forecast to increase**
- **Prices of wheat flour rose to record or near-record levels in December**

Aggregate cereal production in 2014 declined slightly from last year's level

Harvesting of the 2014 winter and spring crops, mainly wheat, barley and maize was completed by the end of September. FAO's latest estimate puts the country's 2014 wheat production at 745 000 tonnes, 4 percent below last year's near-average level. The decrease is the result of lower yields, following shortages of irrigation water during the growing season and a small contraction in area planted. Similarly, 2014 maize production is estimated to have decreased by 7 percent from last year's good level, to be at 100 000 tonnes. The 2014 aggregate cereal output is set at 1.1 million tonnes, 3 percent down from last year's good level but still around the five-year average for 2009-2013.

Planting of the 2015 winter cereal crops, including wheat and barley, started in mid-August and concluded in November. Weather conditions for planting and establishment of the crop have been generally favourable. Early estimates point to an area planted similar to last year.

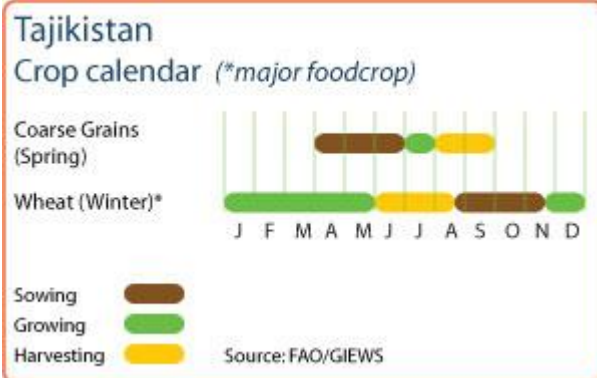
Wheat imports in 2014/15 marketing year (July/June) are forecast to increase

The country depends heavily on cereal imports, mainly wheat, which accounts for almost 98 percent of the total cereal import requirements. Wheat and barley are mainly imported from Kazakhstan, while rice is largely sourced from the Russian Federation. Wheat imports in the 2014/15 marketing year (July/June) are forecast at 1.05 million tonnes, 4 percent above last year's near-average level mainly reflecting the lower 2014 production. In 2013/14, wheat imports reached 1.01 million tonnes with increased wheat grain and reduced flour imports.

Prices of wheat flour rose to record or near-record levels in December

Prices of wheat flour increased during the last quarter of 2014, and in December reached record or near-record levels in nominal terms. As half of the country's wheat consumption requirements are imported, the depreciation of the national currency between November and December, coupled with increased wheat export quotations from Kazakhstan, underpinned prices. The increase in prices was also supported by high domestic fuel and transport costs, despite lower international prices, as well as seasonal demand for winter stocks. Prices of potatoes, another important staple, have also increased markedly in the past few months, and in December they were more than one-third above their levels a year earlier.

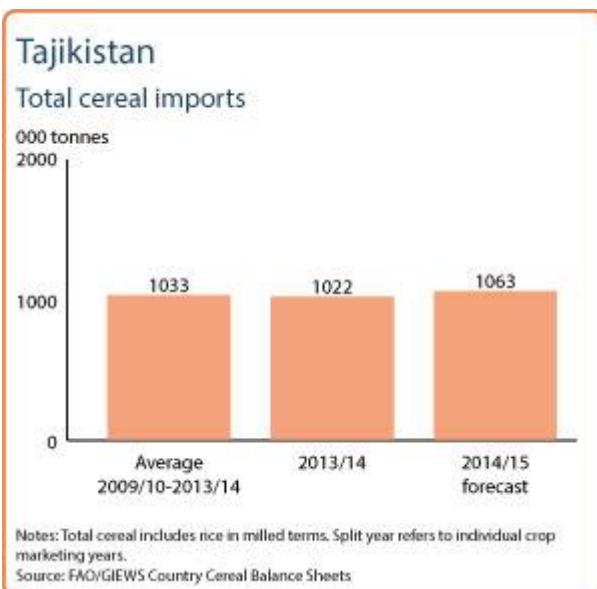
According to official reports, approximately 35 percent of the population



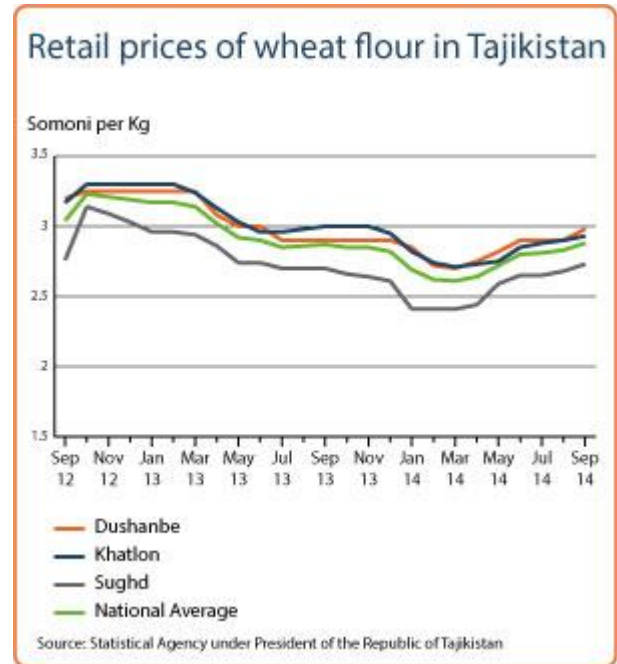
Tajikistan Cereal production

	2009-2013 average	2013	2014 forecast	change 2014/2013
	000 tonnes			percent
Wheat	792	780	745	-4
Maize	105	107	100	-7
Barley	99	133	145	9
Others	86	93	89	-4
Total	1 082	1 113	1 079	-3

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



was estimated to live under the poverty line in 2013. The ratio of households' budget allocated to food remained high and was estimated at around 56 percent in early 2014.



Reference Date: 30-October-2014

FOOD SECURITY SNAPSHOT

- 2014 aggregate cereal production declined slightly from last year's level
- Wheat imports in 2014/15 marketing year forecast to increase
- Prices of wheat flour generally stable and around their year-earlier levels

2014 aggregate cereal production declined slightly from last year's level

Harvesting of 2014 winter and spring crops, mainly wheat, barley and maize was completed by the end of September. FAO's latest estimate puts the 2014 wheat production at 745 000 tonnes, 4 percent below last year's near-average level. The decrease is the result of lower yields, following shortages of irrigation water during the growing season and a small contraction in area planted. Similarly, 2014 maize production is estimated to decrease by 7 percent compared to last year's good level and reach 100 000 tonnes. The 2014 aggregate cereal output is set at 1.1 million tonnes, 3 percent down from last year's good level and close to the five-year average.

Planting of 2015 winter crops, including wheat and barley, started in mid-August and will continue until mid-November. Weather conditions between August and mid-October have been generally favourable, benefiting planting activities and early development of crops.

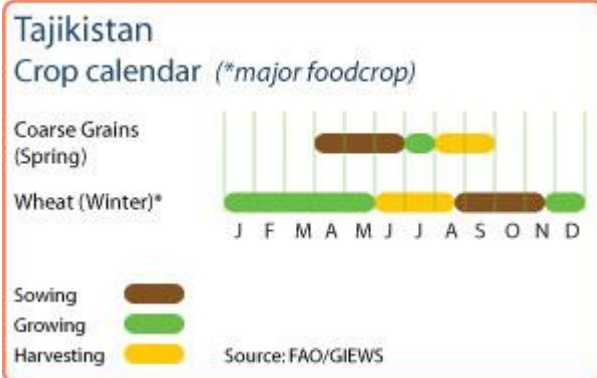
Wheat imports in 2014/15 marketing year (July/June) are forecast to increase

The country depends heavily on cereal imports, mainly wheat, which accounts for almost 98 percent of the total cereal import requirements. Wheat imports in the 2014/15 marketing year (July/June) are forecast at 1.05 million tonnes, 4 percent above last year's near-average level. Wheat and barley are mainly imported from Kazakhstan, while rice is largely sourced from the Russian Federation.

Prices of wheat flour generally stable and around their year-earlier levels

Prices of wheat flour strengthened somewhat in September and were around their levels at the same time last year. The slight decrease in the 2014 wheat output, compared with the previous two years of good production, more than compensated the downward pressure from the recently-completed harvest. Increased fuel prices, mainly reflecting higher costs in the Russian Federation, provided additional support. Prices of staple potatoes remained unchanged or continued to decline and were well below their peaks of May this year, although they remained generally higher than in September 2013.

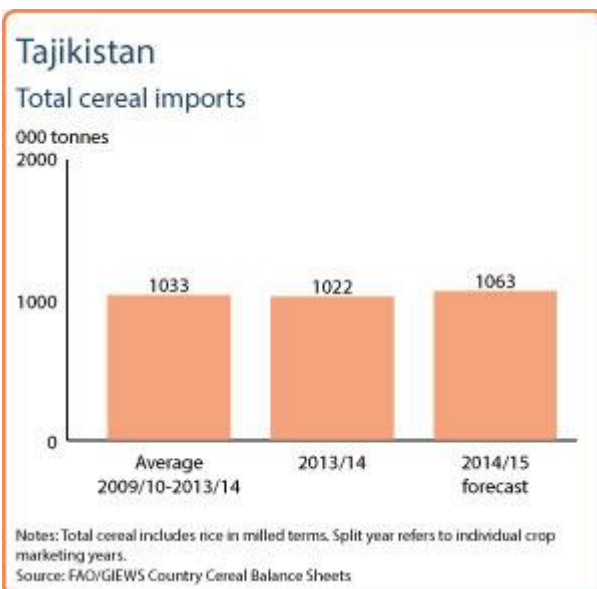
According to official reports, approximately 35 percent of the population was estimated to live under the poverty line in 2013. The ratio of households' budget allocated to food remained high and was estimated at around 56 percent in early 2014.



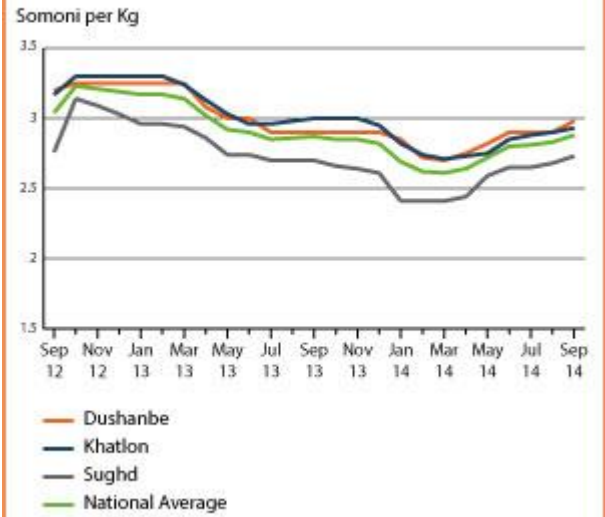
Tajikistan
Cereal production

	2009-2013 average	2013	2014 forecast	change 2014/2013
	000 tonnes		percent	
Wheat	792	780	745	-4
Maize	105	107	100	-7
Barley	99	133	145	9
Others	86	93	89	-4
Total	1 082	1 113	1 079	-3

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



Retail prices of wheat flour in Tajikistan



Reference Date: 16-September-2014

FOOD SECURITY SNAPSHOT

- Aggregate cereal production in 2014 is estimated to decrease
- Wheat imports in the 2014/15 marketing year forecast to increase slightly
- Wheat flour prices were stable in August

Aggregate cereal production in 2014 is estimated to decrease

Harvesting of winter crops (mainly wheat and barley) was completed by mid-August, while that of spring crops (mainly maize and rice) is well underway and is expected to continue until the end of September. FAO's latest estimate puts the 2014 wheat production at 740 000 tonnes, 5 percent below last year's near-average level. The decrease is the result of slightly lower yields, following shortages of irrigation water during the growing season and a small contraction in area planted. The 2014 barley, maize and rice production are anticipated to remain close to last year's good level. The 2014 aggregate cereal output is estimated at 1.06 million tonnes, 5 percent down from last year's good level and close to the five-year average.

Planting of winter cereal crops started in mid-August under generally favourable weather conditions and will continue until mid-November.

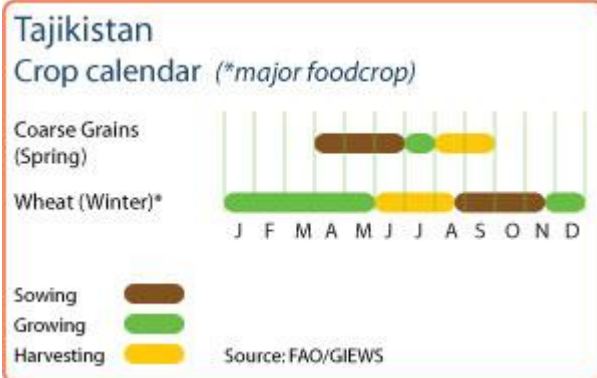
Wheat imports in the 2014/15 marketing year are forecast to increase slightly

The country depends heavily on cereal imports, mainly wheat, which accounts for almost 90 percent of total cereal import requirements. Wheat imports in the 2014/15 marketing year (July/June) are forecast at 1.06 million tonnes, 4 percent above last year's near-average level. Wheat and barley are mainly imported from Kazakhstan, while rice is largely sourced from the Russian Federation.

Wheat flour prices were stable in August

Prices of wheat flour were stable in August and close to their year-earlier levels. Despite improved availabilities from the recently-concluded harvest, prices were supported by increased transport costs. Prices of potatoes, another key staple, recorded sharp seasonal declines for the third consecutive month in August, but still remained considerably higher than their year-earlier levels.

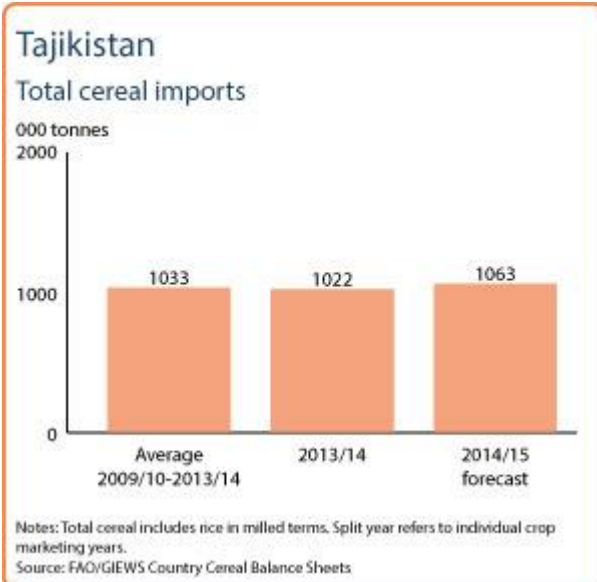
According to official reports, approximately 35 percent of the population was estimated to live under the poverty line in 2013. The ratio of households' budget allocated to food remained high and was estimated at around 56 percent in early 2014.



Tajikistan Cereal production

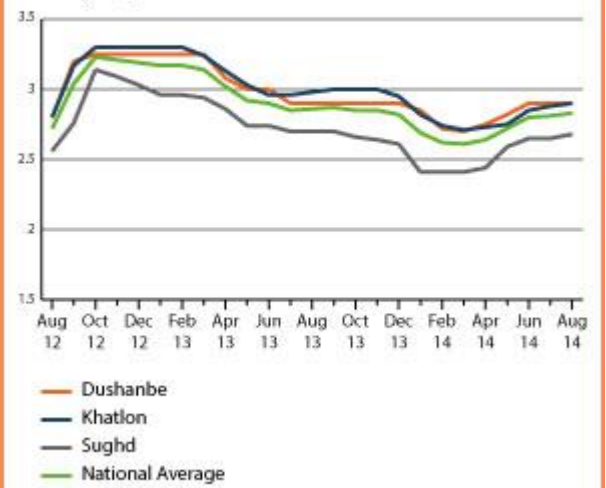
	2009-2013 average	2013	2014 forecast	change 2014/2013
	000 tonnes		percent	
Wheat	792	780	740	-5
Maize	105	107	100	-7
Barley	99	133	130	-2
Others	86	93	89	-4
Total	1 082	1 113	1 059	-5

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



Retail prices of wheat flour in Tajikistan

Somoni per Kg



Source: Statistical Agency under President of the Republic of Tajikistan

Reference Date: 13-August-2014

FOOD SECURITY SNAPSHOT

- Aggregate cereal production in 2014 is forecast to increase slightly
- Wheat imports in the 2014/15 marketing year forecast to be close to last year's average level
- Wheat flour prices remained stable in July

Aggregate cereal production in 2014 is forecast to increase slightly

Harvesting of the winter crops (mainly wheat and barley) is nearing completion, while that of spring crops (mainly maize and rice) just started and is expected to continue until the end of September. On average, winter crops account for about 80 percent of the total cereal output. FAO's latest forecast for the 2014 wheat production stands at 800 000 tonnes, 3 percent up from last year's near-average level. The increase is mainly attributed to anticipated record yields, following favourable weather conditions during the growing season. Similarly, prospects for the 2014 barley, maize and rice crops are good, mainly as a result of above-average rains and adequate supplies of irrigation water. Taking into account the current conditions of the winter and spring crops, the 2014 aggregate cereal production is forecast at 1.13 million tonnes, slightly above last year's good level.

Wheat imports in the 2014/15 marketing year are forecast at a similar level to last year

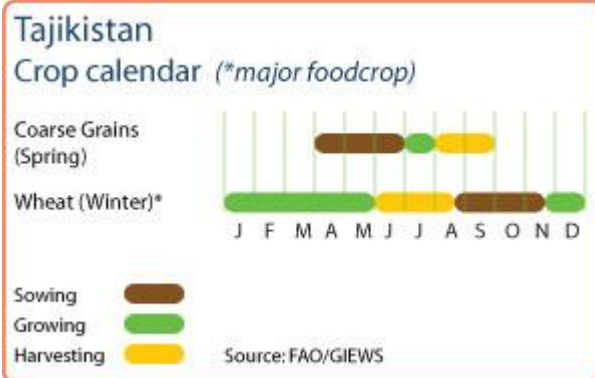
The country depends heavily on cereal imports, mainly wheat, which accounts for almost 90 percent of total cereal import requirements. Wheat imports in the 2014/15 marketing year (July/June) are forecast at 1.1 million tonnes, slightly above last year's average level. Wheat and barley is mainly imported from Kazakhstan, while rice is largely sourced from the Russian Federation.

Wheat flour prices were stable in July

Wheat flour prices were stable in July, with new supplies from the 2014 harvest entering the market. Overall, prices were below their year-earlier levels, as a result of two consecutive good outputs and adequate imports from Kazakhstan.

Prices of potatoes, another important staple, recorded sharp seasonal declines for the second consecutive month in July, but still remained considerably higher than their year-earlier levels. Similarly, prices of beef have generally increased since March 2014 and were at record levels in July, due to strong domestic demand.

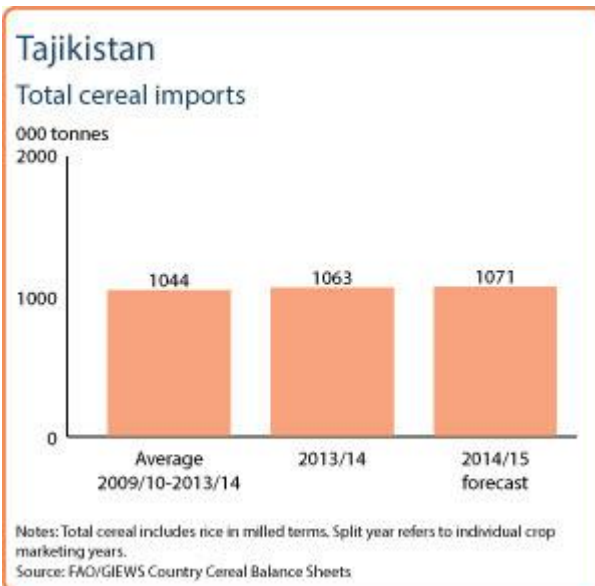
According to official reports, approximately 35 percent of the population was estimated to live under the poverty line in 2013. The ratio of households' budget allocated to food remained high and was estimated at around 56 percent in early 2014.



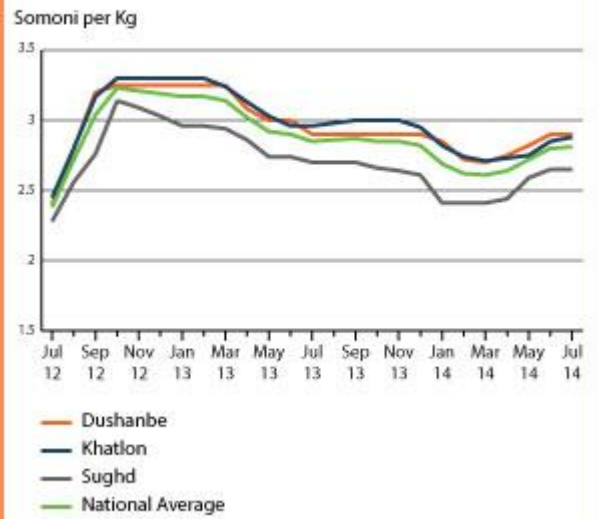
Tajikistan Cereal production

	2009-2013 average	2013	2014 forecast	change 2014/2013
	000 tonnes		percent	
Wheat	792	780	800	3
Maize	105	107	110	3
Barley	99	133	130	-2
Others	85	91	91	0
Total	1 081	1 111	1 131	2

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



Retail prices of wheat flour in Tajikistan



Reference Date: 25-February-2013

FOOD SECURITY SNAPSHOT

- Early forecast for winter cereal production is positive
- The aggregate cereal production in 2012 is close to last year's level
- The country depends heavily on cereal imports that remain at a high level in 2012/13 marketing year
- High food prices are affecting the food security of vulnerable populations

Early forecast for winter cereal production is positive

Despite the level of soil moisture differs by the regions of the country, vegetation conditions for winter crops appear unharmed, possibly due to the continued presence of irrigation water in some areas. The total winter wheat planting area has increased slightly. Assuming normal weather conditions, the early forecast for winter cereal production is positive. Winter crops represent about two thirds of all cereals planted in the country and the winter wheat planting area accounts for approximately 92 percent of the total.

The aggregate cereal production in 2012 is close to last year's level

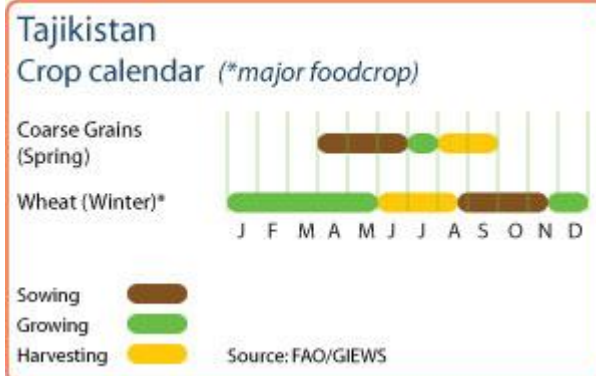
The aggregate 2012 cereal production is estimated at some 1 million tonnes, which is close to both last year's level and the five-year average level. Wheat represents around three fourth of the total aggregated cereal production. Average yields in Tajikistan demonstrate a steady increase for four consecutive years: they are 2.5 tonnes per hectare, although they are much higher in the irrigated fields. The other cereal crops are barley, maize, and rice that represent around 26 percent of the total cereal production on average.

The country depends heavily on cereal imports that remain at a high level in 2012/13 marketing year

The country heavily depends on cereal imports, mainly food wheat despite stable cereal output being experienced for four consecutive years. Imports have been steadily increasing since 2006/07 marketing year (July-June) due to insufficient level of local production, increasing number of population and level of consumption. Wheat imports represent about 80 percent of domestic food consumption in the 2011/12 marketing year, which reflects increased demand both for feed and food. It is estimated that imports account for over 58 percent of Tajikistan's domestic cereal requirements and 81 percent of food consumption for 2012/13 marketing year. Import of wheat and barley mainly comes from Kazakhstan, rice - from the Russian Federation.

High food prices are affecting the food security of vulnerable populations

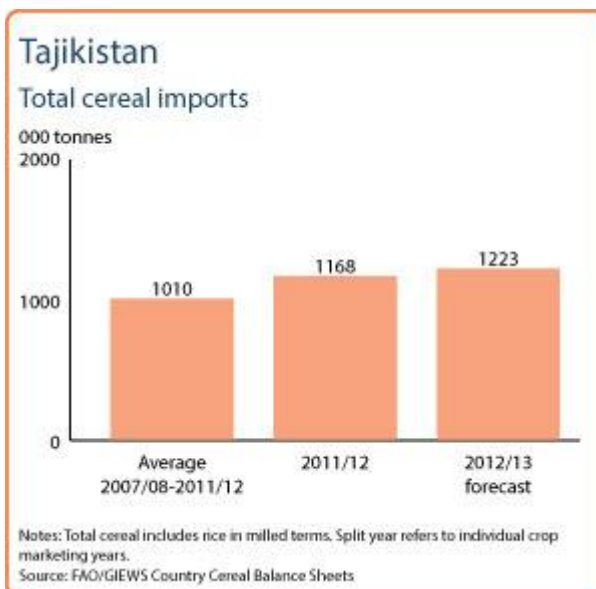
In Tajikistan, which heavily depends on import, prices of wheat flour remained stable or showed some declines in December 2012, though



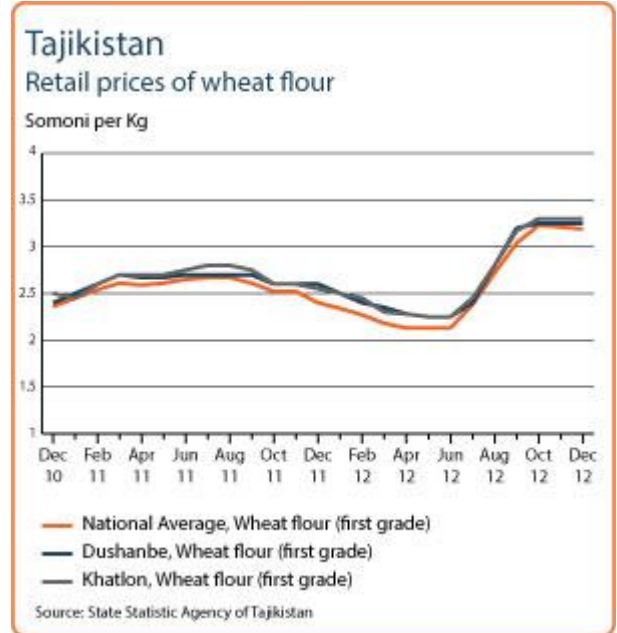
Tajikistan Cereal production

	2007-2011 average	2011	2012 estimate	change 2012/2011
	000 tonnes		percent	
Wheat	742	727	780	7
Maize	99	110	85	-23
Barley	79	74	95	28
Others	75	95	96	1
Total	996	1,006	1,056	5

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



still by 33 percent higher than a year earlier. Prices reflect strong export quotations from Kazakhstan, the country's main supplier. Transportation and fuel prices have also contributed to surging of food prices. In Khatlon and Sughd, December prices of wheat flour were even 29 percent and 44 percent above last year's level, respectively. During 2012 an increase in food prices was also recorded on other staple food products such as potatoes (by 19 percent), beef (by 15 percent), bread and other staple products. For mitigating risks of food price increase the Government has started to release wheat flour from state reserves in parallel to significant increased import of wheat to ensure domestic availability. However, increasing food prices are affecting the food security of vulnerable groups of population.



Reference Date: 12-December-2012

FOOD SECURITY SNAPSHOT

- Planting of grains for 2013 cereal production has been completed
- 2012 cereal production is close to last year's level
- The country depends heavily on cereal imports, which are forecast to remain at a high level in 2012/13 marketing year
- High food prices are affecting the food security of vulnerable populations

Planting of grains for 2013 cereal production has been completed

Early rains helped prepare the land for the sowing for winter crops such as winter wheat and barley. Despite the overall rainfall in early October being below average, vegetation conditions continue to appear unharmed, possibly due to the continued presence of irrigation water in some areas. Good rains and snow from last year provided for adequate moisture for planting. The total winter wheat planting area has increased slightly. Assuming normal weather conditions, the early forecast for winter cereal production is positive. Winter crops represent about two thirds of all cereals planted in the country and the winter wheat planting area accounts for approximately 92 percent of the total.

2012 cereal production is close to last year's level

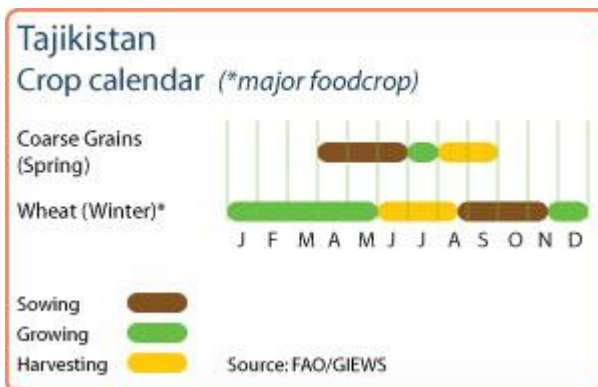
Aggregated cereal production for 2012 is estimated at some 1 million tonnes, which is close to both last year's level and the five-year average level. Wheat represents around three fourth of the total aggregated cereal production and average yields in Tajikistan are 2.2 tonnes per hectare, although they are much higher in the irrigated fields. The other cereal crops are barley, maize, and rice that consists around 26-27 percent of the total cereal production on average.

The country depends heavily on cereal imports, which are forecast to remain at a high level in 2012/13 marketing year

Despite stable cereal output being experienced for four consecutive years, local production is still not sufficient to cover domestic needs in the country. Imports have been steadily increasing since 2006/07 marketing year (July-June). Wheat imports represent about 80 percent of domestic food consumption in the 2011/12 marketing year, which reflects increased demand both for feed and food. Imports account for over 57 percent of Tajikistan's domestic cereal requirements for 2012/13 marketing year and they come mainly from Kazakhstan.

High food prices are affecting the food security of vulnerable populations

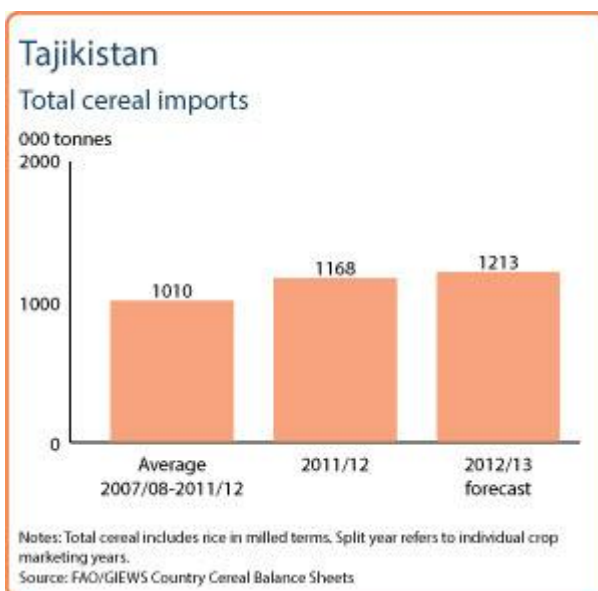
Tajikistan imports about half of the wheat it needs for food, and wheat flour prices increased to record levels in October 2012 (28 percent above last year's level and 50 percent higher than in June 2012). In Khalton, prices were even 31 percent above last year's level. Prices were mainly underpinned by strong export quotations from Kazakhstan,



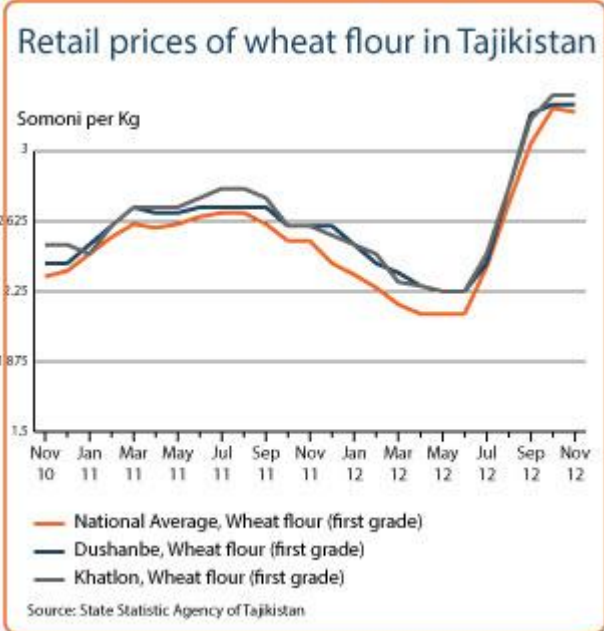
Tajikistan Cereal production

	2007-2011 average	2011	2012 estimate	change 2012/2011
	000 tonnes		percent	
Wheat	742	727	720	-1
Maize	99	110	85	-23
Barley	79	74	95	28
Others	75	95	96	1
Total	996	1,006	996	-1

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



the country's main supplier. Transportation and fuel prices have also contributed to surging prices. In response to high prices, since October, the Government has continued to release wheat flour from state reserves and it is importing significant amounts of wheat to ensure domestic availability. From January to November 2012, an increase in food prices was also recorded on other staple food products such as beef, mutton, milk, carrots, and apples by 12, 15, 8, 20, and 6 percent respectively compared to the same period last year. Thus, increasing food prices are affecting the food security of vulnerable populations of the country.



Reference Date: 22-May-2011

FOOD SECURITY SNAPSHOT

- 2011 cereal production forecast to decline
- Cereal imports in 2010/11 (July/June) remain high
- High food prices affecting food security of vulnerable populations

Uncertain prospects for 2011 cereal crops

Below average rains from October to March are likely to have resulted in a decline of plantings and yields of the winter rainfed cereal crops, accounting for 55 percent of the area sown to winter cereals. Improved precipitation in April-May 2011 benefited sowing of spring cereal crops and development of earlier planted crops. Above average temperatures in the spring have also resulted in higher than usual insect infestation. The final outcome of this year's cropping season will crucially depend on precipitation in the next few weeks. However, early forecasts point to a decline of the 2011 aggregate cereal production from the bumper levels of the past two years. This year, the wheat crop was mainly damaged from a dry and hot spring as well as insects.

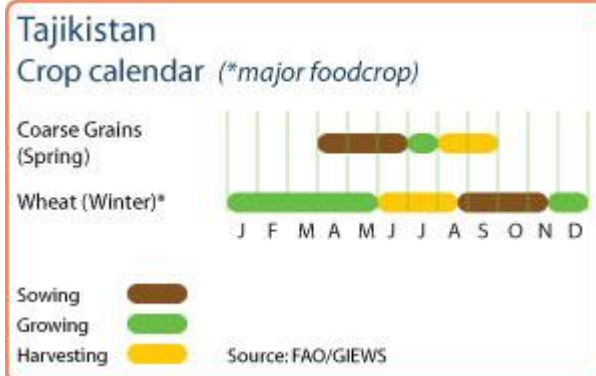
Cereal imports remain high despite two consecutive bumper crops

Despite well above average cereal outputs in 2009 and 2010 wheat imports (representing the bulk of cereal imports) in the 2010/11 marketing year have remained at high levels reflecting increased demand, particularly for feed. Imports still account for 51 percent of the cereal consumption requirements of the country.

Food prices stabilized at record levels in April

Prices of wheat flour, which had been on a steady increase since mid-2010 and reached record levels in March, remained stable or marginally declined in April. The stabilization of wheat flour prices is due to the release of state reserves in recent months. At its current levels, the national average price of wheat flour is 50 percent higher than a year earlier. However, prices of subsidized bread have remained virtually unchanged from their levels in April 2010. Prices of potatoes, another main staple in the country, are also at record levels. Prices of other foods such as sugar, beef, mutton, onion have also risen. Overall, the high level of prices reflects trends in the international markets and higher fuel prices.

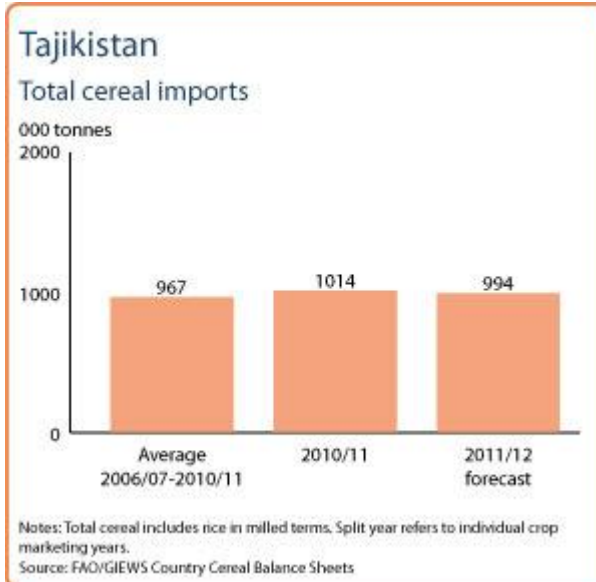
Increased staple food prices, coupled with high levels of poverty (45 percent) are resulting in the deterioration of food security in the country. The food situation is particularly serious for households not cultivating crops and living in remote areas of the Rasht and Zarafshan Valleys.



Tajikistan Cereal production

	2006-2010 average	2010	2011 forecast	change 2011/2010
	000 tonnes		percent	
Wheat	734	860	730	-15
Maize	99	90	75	-17
Barley	70	90	85	-6
Others	9	8	10	25
Total	967	1 108	964	-13

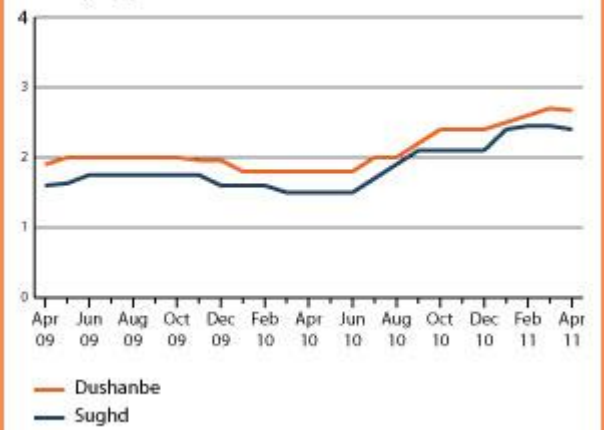
Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets



Tajikistan

Retail prices of wheat flour

Somoni per kg



Source: State Statistic Agency of Tajikistan

Reference Date: 09-November-2010

FOOD SECURITY SNAPSHOT

- The 2010 cereal production declined somewhat from last year's record due to earthquake and floods damages in several areas
- Cereal imports needs remain large despite better crops in recent years
- Recent food prices increases put at risk the improved food security situation in the country

In 2010 cereal production declined slightly from last year's record

In 2010, generally good precipitation and adequate soil moisture conditions favoured crops during the growing season, but floods and damages caused to irrigation infrastructure by a severe earthquake in January had a negative impact on crop development in affected areas. Cereal production in 2010 dropped from the previous year record level by some 5 percent but remained well above the five-year average.

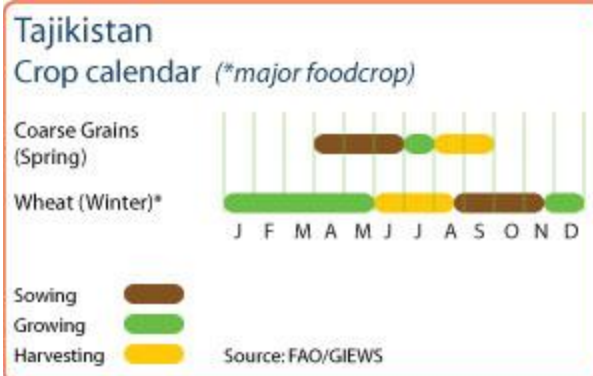
Cereal imports remain large despite better crops in recent years

At national level, the significant increase in cereal output in 2009 resulted in a satisfactory food supply situation and an increase in stocks. Wheat imports (representing the bulk of cereal imports) declined in 2009/10 marketing year reflecting the higher crop output, but still covered about 50 percent of domestic utilization. In 2010/11 wheat imports are expected to increase (by around 10 percent) reflecting the lower 2010 domestic output.

Recent food prices increases put at risk the improved food security

According to the August 2010 WFP food security assessment, there has been an improvement in the overall food security situation since the previous survey in February 2010, with 7 percent (down from 10 percent) of the households interviewed classified as severely food insecure and 16 percent moderately food insecure (decreased from 21 percent). Rural households benefited from the good 2009 harvest, better livestock health and breeding, higher remittances and seasonal jobs.

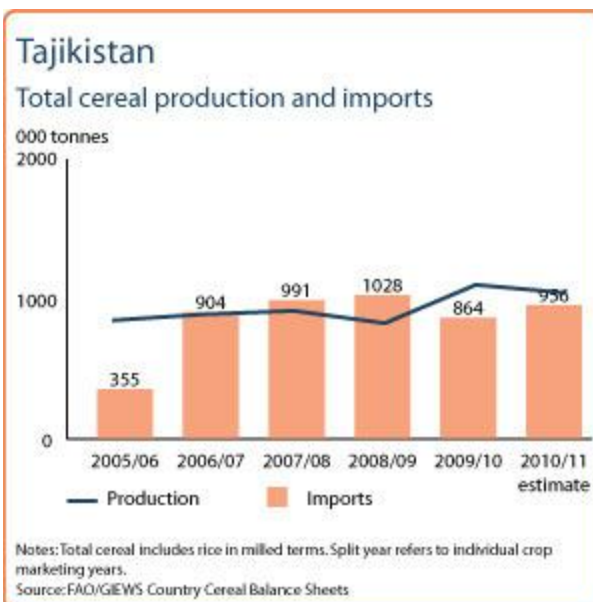
However, increasing staple food prices represent the main threat to households' food security. In recent months, the price of wheat flour has increased by almost 30 percent and prices of other foods such as sugar, beef, mutton, potato, onion have also risen. High prices are mainly due to external factors: speculation of local traders due to recent wheat export ban in Russia, and reduced harvest in Kazakhstan and increase in fuel prices.



Tajikistan Cereal production

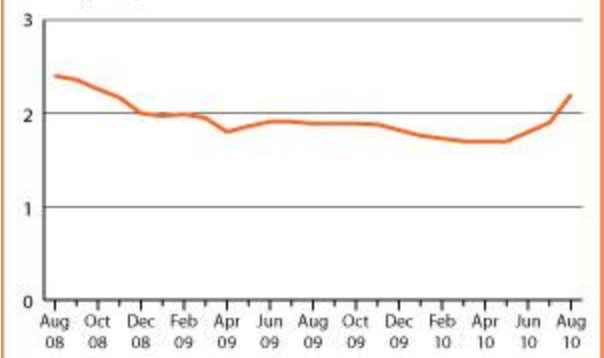
	2005-2009 average	2009	2010 estimate	change 2010/2009
	000 tonnes			percent
Wheat	686	864	800	-7
Maize	103	87	80	-8
Barley	63	81	90	11
Others	64	69	73	6
Total	916	1101	1043	-5

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



Tajikistan Retail price of wheat flour

Somoni per kg



Source: State Committee on Statistics, Republic of Tajikistan