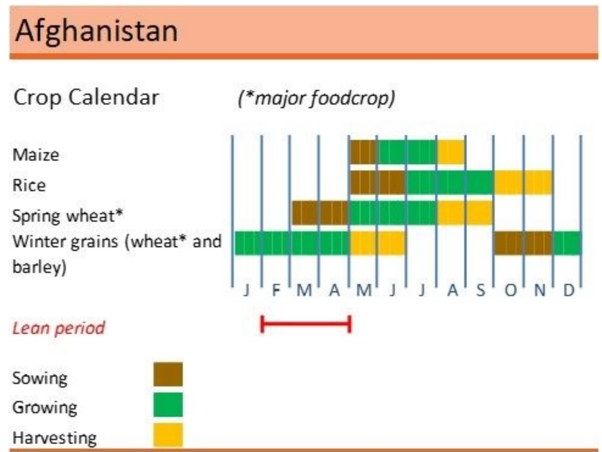
Food and Agriculture Organization of the United Nations

GIEWS Country Brief
The Islamic Republic of Afghanistan

Reference Date: 05-June-2023

FOOD SECURITY SNAPSHOT

- **Despite weakening of La Niña event, dry weather conditions affect 2023 crops**
- **Ban on poppy cultivation shifts land to other crops**
- **Below-average cereal harvest expected in 2023**
- **Cereal import requirement is forecast slightly above average**
- **Food prices eased, but remain at high levels, amidst precarious economic conditions**
- **High levels of food insecurity prevail**



Despite weakening of La Niña event, dry weather conditions affect 2023 crops

Planting of the 2023 spring wheat crop was concluded in April. Harvesting of the 2023 winter wheat and barley crops, planted in October 2022, started in May, but the bulk is usually harvested in June. As a result of the La Niña event which started in late 2020, most of the country experienced drought conditions in 2021 and 2022. Although weakening, La Niña has also affected the 2023 harvest.

In the 2022/23 cropping season, precipitation varied across the country. Between October 2022 and April 2023, while some central and northeastern areas received near-average precipitation amounts, the rest of the country experienced below-average precipitation amounts and accumulated below-average snow cover. Insufficient precipitation during the winter months adversely affected the development of winter cereal crops and reduced the availability of irrigation water from melted snow for summer crops. Close-to-average rainfall amounts in April and May 2023 improved production prospects in central and eastern parts of the country, while dry weather conditions remain a concern for both irrigated and rainfed wheat crops elsewhere.

Forecasts point to a transition to an El Niño event in May-July 2023 which is usually associated with above-average precipitation amounts across the country and could support the production of summer crops. However, if precipitation amounts remain at near-average levels, it will be unlikely to compensate

Afghanistan

Cereal Production

	2018-2022 average	2022	2023 forecast	change 2023/2022
		000 tonnes		percent
Wheat	4 280	3 810	4 000	5.0
Rice (paddy)	593	592	550	-7.1
Maize	187	190	190	0.0
Others	112	110	110	0.0
Total	5 171	4 702	4 850	3.1

Note: percentage change calculated from unrounded data.

for overall precipitation deficits and ease dry conditions in the north, west and south in the remainder of the season.

Agricultural inputs are reported to be available, but not accessible. In March 2022, prices of Diammonium Phosphate (DAP) and Urea fertilizers were about 40 percent and 20 percent, respectively, above the last two-year average. The lack of certified seeds, particularly those suitable for rainfed areas, also constrains yields.

In May 2023, a Moroccan locust outbreak was detected in northern and northeastern regions. Although control operations are currently underway, funding constraints and lack of inputs limit their scale, likely reducing overall food production.

Ban on poppy cultivation shifts land to other crops

In April 2022, the Taliban authorities banned cultivation of poppy, but granted a grace period of two months, essentially allowing the 2022 harvest to be completed. In 2022, the area under poppy cultivation increased by 32 percent compared to the previous year to 233 000 hectares, making the 2022 area the third largest area under poppy cultivation since monitoring began. In 2022, drought constrained yields and the total opium harvest was estimated at 6 200 tonnes, about 10 percent less than in 2021. Expecting a tight market situation due to the ban, opium prices skyrocketed and the value at farmgate of opium production reached USD 1.36 billion in 2022 (equivalent to almost 30 percent of the total agricultural sector value in 2021), up from USD 425 million in 2021.

The poppy crop is planted by November for harvest between April and July of the following year. Although in November 2022 actual implementation modalities of the ban were still unknown, reports indicate that some poppy farmers opted to switch to other crops, such as wheat and cotton. As of April and May 2023, when the harvest was about to start, an eradication campaign was enforced on planted fields.

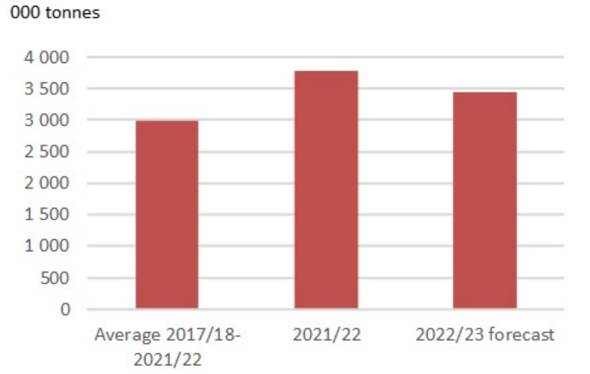
Below-average cereal harvest expected in 2023

It is unlikely that the entire area planted with poppy in 2022, corresponding to about 10 percent of the average area planted with wheat, was actually converted to wheat. However, part of it was most likely and despite dry weather conditions in parts of the country, the planted area has increased, pushing the wheat production forecast to 4 million tonnes, about 4 percent below the average and 5 percent above the drought-stricken 2022 harvest. Total 2023 cereal production is currently forecast at a below-average level of 4.85 million tonnes.

Below-average precipitation amounts in parts of the country have also affected pastoralists' livelihoods, which were already struggling due to the low availability of pasture during the last two years. An exceptionally cold wave during the winter resulted in the death of several thousand of animals, mostly due to lack of preparedness and eroded resilience capacity of the farmers who lacked the economic resources to ensure suitable winterization.

Afghanistan

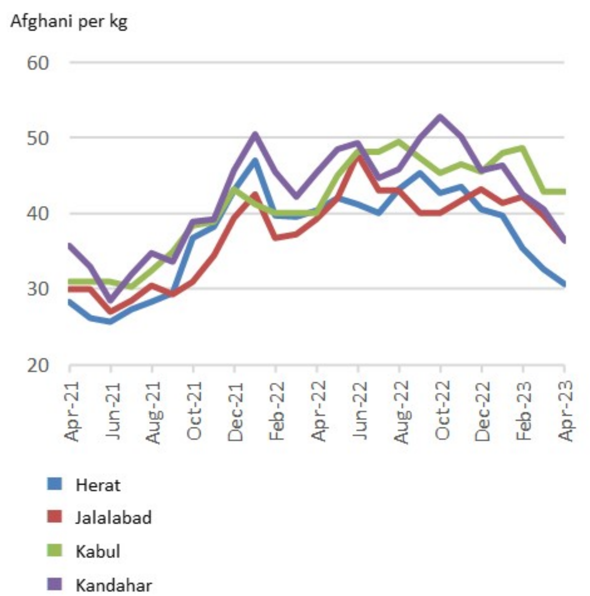
Cereals Imports



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

Afghanistan

Wheat prices in selected markets



Slightly above-average cereal import requirements forecast

Cereal import requirements, mainly wheat and wheat flour, in the 2022/23 marketing year (July/June) are forecast at an above-average level of 3.4 million tonnes, over 8 percent less than in the previous year. However, even during years with an above-average domestic wheat production, the country imports large quantities of wheat flour due to the inadequate domestic milling capacity. Imported flour is often blended with domestic flour in order to improve its protein content.

Although significant amounts of wheat flour were sourced from Pakistan in the past, since 2019, Kazakhstan and Uzbekistan emerged as the main suppliers of wheat flour. In the 2022 calendar year, almost 63 percent of imported wheat flour was from Kazakhstan and 36 percent from Uzbekistan.

Food prices eased, but remain at high levels

The World Bank estimated that the economy contracted in 2021 by over 20 percent, followed by an additional contraction of 3.7 percent in 2022. Increased humanitarian funding, the main source of foreign currency, allowed for a precarious stabilization of the Afghan economy in late 2022 when the national currency, Afghani, stabilized at AFG 90/USD 1, compared to AFG 80/USD 1 in August 2021. Limits on hard currency exports remain in place in an effort to avoid capital flight.

Any potential reduction of humanitarian funding could destabilize the economy, amid ongoing tensions between main donor governments and the de facto authorities, further fuelled by successive bans on female education and employment. The national economy is also highly dependent on its main trading partner, Pakistan, currently beset by an economic and political crisis. For 2023, the United Nations Development Programme (UNDP) projects a real Gross domestic product (GDP) growth of 1.3 percent, assuming international support maintains its 2022 pace and no additional shocks materialize.

Although food prices decreased from the peaks of the last quarter of 2022, prices of almost all key commodities in April 2023 were still well above the last two-year average, with severe negative consequences in terms of food access for the most vulnerable households.

High levels of food insecurity prevail

According to the latest available Integrated Food Security Phase Classification (IPC) food security analysis, approximately 15.3 million people (35 percent of the population analyzed) are projected to face high acute food insecurity (IPC Phase 3 [Crisis] and above) between May and October 2023, including about 2.8 million people in IPC Phase 4 (Emergency). Although the levels of acute food insecurity have declined compared to the same season in 2022, largely due to seasonal improvements and the scale-up of humanitarian assistance in 2022, the situation could deteriorate in areas where humanitarian assistance faces access constraints.

The ban on women's participation in the humanitarian response poses a challenge to the delivery of quality humanitarian assistance leading to significant additional access constraints, particularly to the most vulnerable, women and children.

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/.

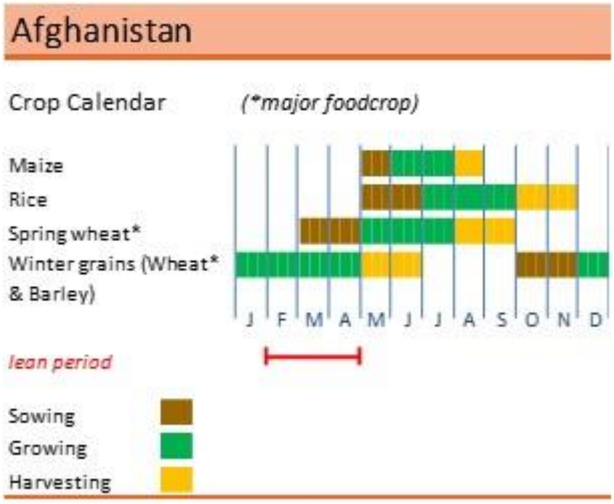
Food and Agriculture Organization of the United Nations

GIEWS Country Brief
Afghanistan

Reference Date: 23-December-2021

FOOD SECURITY SNAPSHOT

- **Unfavourable conditions for sowing of 2022 winter wheat crop**
- **Increasing prices of agricultural inputs limit access**
- **Poor rainfall will impact pasture conditions in spring**
- **Below-average 2021 harvest increased cereal import requirements forecast in 2021/22**
- **Food prices increasing, record levels of food insecurity prevail**
- **Food security outcomes expected to deteriorate with unstable political and economic situation**



Source: FAO/GIEWS, FEWSNET.

Afghanistan

Cereal Production

	2016-2020 average	2020	2021 estimate	change 2021/2020
	000 tonnes			percent
Wheat	4 504	5 185	3 900	-24.8
Rice (paddy)	558	657	580	-11.7
Maize	210	272	180	-33.8
Others	152	138	110	-20.3
Total	5 425	6 252	4 770	-23.7

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

Unfavourable conditions for sowing of 2022 winter wheat crop

Planting of winter wheat and barley started in late October. In northern and northeastern parts of the country, the first significant rainfall occurred during early November, while the rest of the country remained dry. Cumulative rainfall amounts since September 2021 were about 30 percent below the average. According to the latest seasonal weather forecast, drier-than-average conditions are likely to continue until January 2022 due to a weak-to-moderate La Niña forecast for the 2021/22 wet season.

Given the erratic and below-average rains, the area planted with winter wheat is expected to be below the average of about 2.5 million hectares. Field reports indicate that half of the grounds normally sown with winter wheat were fallow as of late November, while the planting window is closing in December. Although normally the majority of the wheat grown in the country is cultivated during the winter, farmers might choose to increase the area planted with spring wheat, if sufficient inputs are available and the February to April precipitation is favourable.

It is important to consider that inadequate precipitation (both as rainfall and snowfall) during the winter months adversely affects the development of the winter cereal crops and reduces the availability of irrigation water from melted snow in the summer. Pasture growth will also be impacted.

Prices of agricultural inputs, such as certified seeds of improved wheat varieties, vegetable seeds, fertilizers (urea and diammonium phosphate) and concentrated animal feed increased. Between June/July 2021 and

October/November 2021, the increases ranged from 43 percent for seeds to over 120 percent for urea.

Below-average 2021 cereal harvest

The 2020/21 agricultural season was marked by erratic rainfall due to La Niña weather conditions. The government declared a drought emergency in June 2021 as severe dry weather conditions affected 75 districts (out of 421) in various parts of the country.

The 2021 aggregate cereal production is estimated at 4.8 million tonnes, more than 20 percent below the 2020 harvest and 12 percent below average. Although the overall conditions of winter cereal crops in parts of central and northeast areas were generally satisfactory, the production of rainfed crops in western, southwestern and southern areas was significantly below the average level. Yields were also constrained by the lack of quality inputs, particularly certified seeds suitable for rainfed areas.

The poor precipitation in 2020/21 has also severely affected pastoralist livelihoods, directly affecting over 3 million heads of animals. Low availability of pasture, water and supplementary feed forced livestock owners to resort to distressed sales, putting downward pressure on prices of live animals.

Despite ongoing eradication efforts, the opium production in 2021 increased. According to the United Nations Office on Drugs and Crime, the 2021 total area under opium poppy cultivation is estimated at 177 000 hectares, about 20 percent less than in 2020. However, despite the decreased area and the effects of drought in the southwestern parts of the country where a large share of the cultivation takes place, potential opium production in 2021 was estimated at 6 800 tonnes, about 8 percent more than in 2020. Although the sustained production decreased the average farmgate price of opium from about USD 200/kg in 2017 to USD 55/kg in 2020, the uncertainty following the takeover of the country in August 2021 pushed prices to over USD 100/kg, creating incentives for cultivation as the new crop was planted last November.

Above-average cereal import requirements forecast

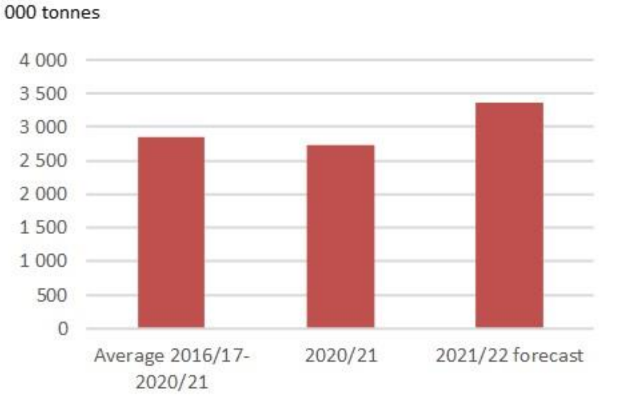
Cereal import requirements, mainly wheat and wheat flour, in the 2021/22 marketing year (July/June) are forecast at an above-average level of 3.4 million tonnes, over 20 percent more than in the previous year. However, even during years with an above-average domestic wheat production, the country imports large quantities of wheat flour due to the inadequate domestic milling capacity. Imported flour is often blended with domestic flour in order to improve its protein content. In Pakistan and Kazakhstan, the main sources of wheat and wheat flour of the country, export availabilities are estimated at average to slightly above-average levels in the current marketing year. However, the increasing transportation costs and the constrained ability to finance imports could limit the country's capacity to source sufficient import volumes on commercial basis.

Food prices increasing

Following the reduced 2021 harvest and strengthening international commodity prices, wheat prices have been increasing across the country since May 2021, with a surge following the country takeover in August. In Kabul, wheat prices

Afghanistan

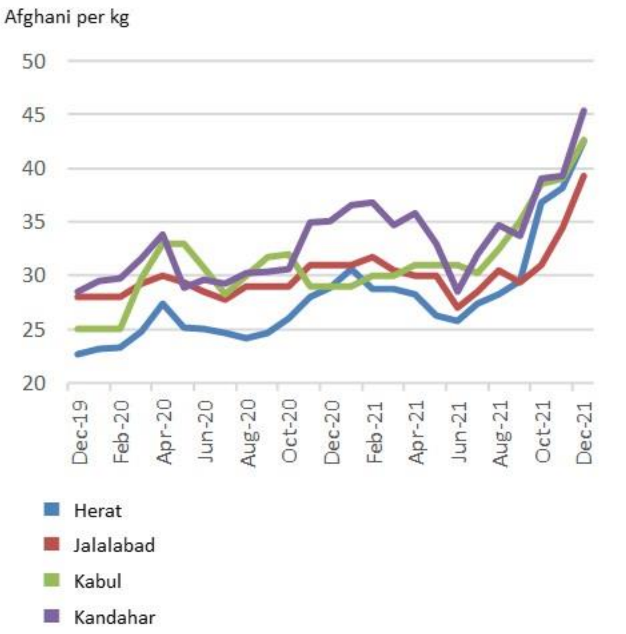
Cereals Imports



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.

Afghanistan

Wheat prices in selected markets

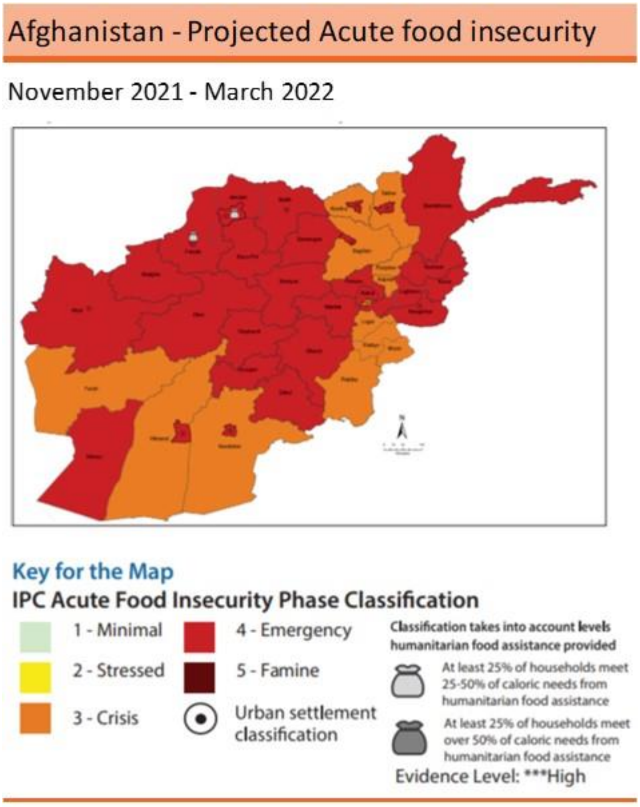


Source: FAO/GIEWS Food Price Monitoring and Analysis Tool.

increased from AFN 30/kg in July 2021 to AFN 39/kg in November 2021. Similarly, wheat flour prices strengthened from AFN 33/kg in July 2021 to AFN 44/kg in October 2021 and marginally eased to AFN 43/kg in November 2021. In nominal terms, wheat grain and flour prices exceeded the previous price records set in 2008, at the height of the global food price crisis.

Although prices vary among regions, reflecting high transportation costs due to the poor road network, security concerns and supply chain bottlenecks, price differentials have decreased after August 2021. For example, in June 2021, wheat flour was 30 percent more expensive in Kandahar than in Herat, while the price difference in November 2021 was only 8 percent.

Food prices have increased also due to record high prices of diesel as global oil prices strengthened in 2021 and imports of fuel stagnated. In December 2020 diesel was sold at approximately AFN 37/litre, while its price increased to over AFN 72/litre in the first week of December 2021.



Record levels of food insecurity prevail

A record of 19 million people were estimated to face acute food insecurity between September and October 2021, due to the devastating combined effects of drought, conflict and collapse of the local economy. About 6.8 million people, mainly located in the northern half of the country, are experiencing particularly high levels of acute food insecurity, classified in IPC Phase 4 (Emergency). Between November 2021 and March 2022, during the winter lean season, the food insecurity situation is expected to deteriorate and the number of people in IPC Phase 3 (Crisis) or above is likely to increase to 22.8 million, about 35 percent more than during the same season in 2020/21 (16.9 million), including 8.7 million in IPC Phase 4 (Emergency). Almost 80 percent of these 22.8 million people, projected to be facing acute food insecurity, relied in rural area and are primarily dependent on agricultural livelihoods. Therefore, protection of agricultural livelihoods will prevent further deterioration of the situation and additional displacement to urban centres.

Following the developments of August 2021 in the country, the international aid flows, an important element of public spending, were halted. Salaries of public sector workers have been delayed and livelihood opportunities outside agriculture remain limited. The banking sector has introduced limitations on hard currency withdrawals, which also affected the country's ability to import basic goods. The food security situation and agricultural livelihoods in the country is likely to significantly deteriorate in the coming months due to cumulative and cascading impact of multiple shocks, including weather, conflict, economic crisis and the lingering effects of the COVID-19 pandemic.

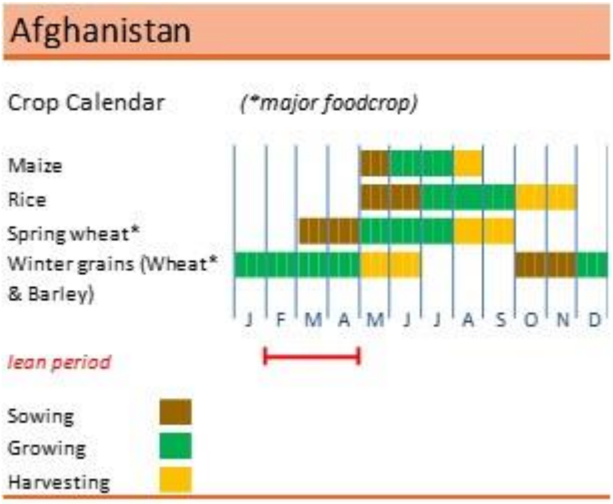
Food and Agriculture Organization
of the United Nations

GIEWS Country Brief
Afghanistan

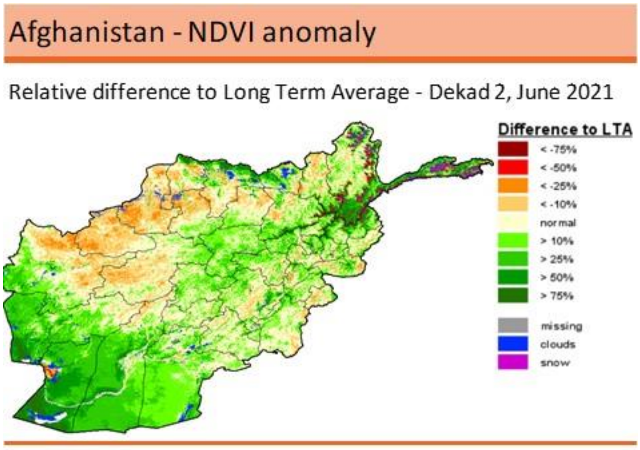
Reference Date: 15-July-2021

FOOD SECURITY SNAPSHOT

- **Drought affecting agricultural livelihoods**
- **Above-average cereal import requirements forecast in 2021/22**
- **Food prices and inflation easing but high levels of food insecurity prevail**
- **Food security outcomes expected to deteriorate with unstable security and political situation**



Source: FAO/GIEWS, FEWSNET.



Source: FAO/GIEWS Earth Observation System.

Erratic rainfall resulted in drought

Harvesting of the 2021 winter wheat and barley started in May in the eastern part of the country and will be completed in August in the mountainous areas. Sowing of spring wheat, for harvesting from August, was completed in April. The majority of the wheat grown in the country is of rainfed winter cultivation.

The 2020/21 agricultural season was marked by erratic rainfall resulting from La Niña weather conditions. The first significant rainfall of the season occurred in the second decade of November 2020 and allowed the finalization of winter wheat sowing under relatively favourable conditions. Snow accumulation, critical for protecting dormant crops from frost kill and an important source irrigation water for spring planted crops, was below average from December 2020 to February 2021. Ample, albeit not uniformly distributed in time and space, precipitation amounts from mid-February through early May partially eased soil moisture deficits. The government declared a drought emergency on 22 June 2021 as, according to news reports citing the Ministry of Agriculture, Irrigation and Livestock, severe dry weather conditions affected 75 (out of 421) districts in various parts of the country.

Below-average cereal harvest expected

Although the overall conditions of winter cereal crops in parts of central and northeast areas have been generally satisfactory, the production of rainfed crops in western, southwestern and southern areas is likely to be below average.

The 2021 aggregate cereal production is preliminarily forecast at a 4.6 million tonnes, about 20 percent below the 2020 harvest and 15 percent below average. In addition to the unfavourable weather conditions, the lack of quality inputs, particularly certified seeds suitable for rainfed areas, constrained yield potential.

The poor precipitation has severely affected pastoralist livelihoods. Reports indicate that low availability of pasture, water and supplementary feed is forcing livestock owners to resort to distressed sales, putting a downward pressure on prices of live animals.

Elsewhere in the sector, despite eradication efforts, opium production has increased. According to the 2020 Opium Survey (released in April 2021), the 2020 total area under opium poppy cultivation was estimated at 224 000 hectares, an increase of 37 percent compared to 2019, but below the record level of 330 000 hectares cultivated in 2017. The majority of the cultivation took place in the southwestern part of the country which has been affected by drought in 2021, presumably decreasing the 2021 opium output. Potential opium production in 2020 is estimated at 6 300 tonnes, about the same as in 2018 and 30 percent less than the 2017 record output. The farmgate opium prices decreased from USD 63/kg in 2019 to USD 55/kg in 2020.

Above-average cereal import requirements forecast

Cereal import requirements, mainly wheat and wheat flour, in the 2021/22 marketing year (July/June) are forecast at an above-average level of 3.6 million tonnes, 28 percent higher than in the previous year. Even during years with an above-average domestic wheat production, the country imports large quantities of wheat flour due to the inadequate domestic milling capacity. Imported flour is often blended with domestic flour in order to improve its protein content. Pakistan and Kazakhstan are the main sources of wheat and wheat flour of the country. Export availabilities in both countries in the current marketing year are estimated at average to slightly above-average levels.

Food prices and inflation easing

In Kabul, wheat prices remained stable at AFN 31/kg between April and June 2021, at the same level of June 2020. By contrast, wheat flour prices eased from AFN 35.50/kg in April 2021 to AFN 32/kg in June 2021, about 15 percent below the price levels in June 2020, reflecting adequate market availabilities. Large regional differences prevail, reflecting high transportation costs due to a poor road network, security concerns and supply chain bottlenecks. For example, in June 2021, wheat flour was 30 percent more expensive in Kandahar than in Herat. Although prices declined from the high levels reached in April 2020, they generally remained above the pre-COVID-19 levels in early March 2020.

Food prices have increased also due to record high prices of diesel as global oil prices strengthened in 2021. While in February 2021 diesel sold for approximately AFN 42/litre, in the first week of July 2021, in almost all provinces, it was selling for over AFN 50/litre, even exceeding AFN 60/litre in Kunduz and Sari-pol provinces.

The year on year food price inflation rates gradually eased from almost 17 percent in April 2020, the highest level in the past seven years as households stockpiled at the beginning of the COVID-19 pandemic, to negative 5 percent in April 2021 and negative 1.5 percent in May 2021. The Consumer Price Index (CPI), which in the last 12 months fluctuated between 4 and 6.4 percent, eased to 1.4 percent in May 2021. The overall

Afghanistan

Cereal Production

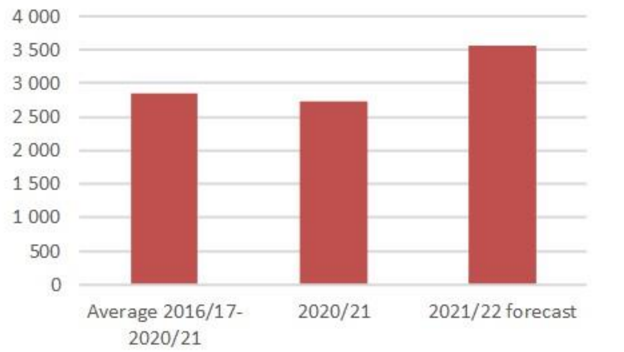
	2016-2020 average	2020	2021 forecast	change 2021/2020
	000 tonnes			percent
Wheat	4 443	4 700	3 700	-21.3
Rice (paddy)	558	657	580	-11.7
Maize	196	200	180	-10.0
Others	157	160	110	-31.3
Total	5 353	5 717	4 570	-20.1

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

Afghanistan

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.

inflation rate in the country is largely determined by changes in prices of food products.

High levels of food insecurity prevail

From March to May 2021, corresponding to the end of the lean season, about 10.9 million people were estimated in IPC Phase 3: “Crisis” and IPC Phase 4: “Emergency”, representing one-third of the population analysed. During the harvest and post-harvest seasons, between June and November 2021, a slight improvement in the food security situation is expected, with the number of people in IPC Phase 3: “Crisis” or above decreasing to 9.5 million.

Between January and June 2021, about 604 000 returnees from the Islamic Republic of Iran and 6 800 from Pakistan were recorded, well above the number of the returnees recorded in the same period in 2020 (362 000 from the Islamic Republic of Iran and 2 000 from Pakistan). Lack of employment opportunities and abuse by authorities are among the most frequent reasons to return from the Islamic Republic of Iran. Many Afghan returnees end up displaced and are in need of humanitarian assistance.

Following the planned withdrawal of foreign troops from the country scheduled to be completed by 31 August 2021, the Taliban seized control of a number of districts across the country. Sustained territorial gains by the group are likely to aggravate the already fragile security, economic and social situation in the country. In an immediate term, increases in violence and displacement are likely to occur. The worsening security situation will have a negative impact on the country’s economic performance, eroding part of the estimated improvements in food security outcomes. In addition, the vulnerable households with limited income-earning opportunities continue to be affected by increasing number of COVID-19 cases as the vaccination campaign progress remains very slow.

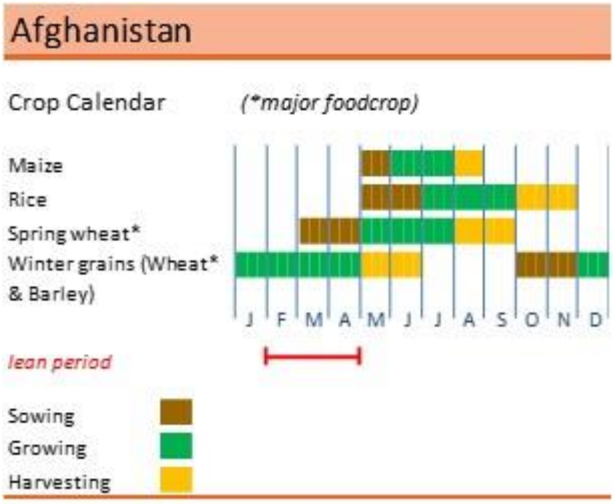
Food and Agriculture Organization of the United Nations

GIEWS Country Brief
Afghanistan

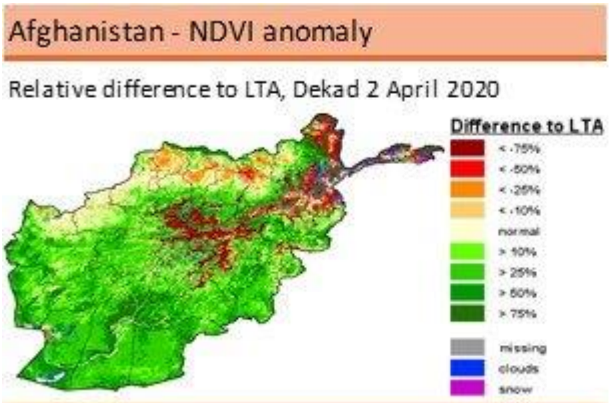
Reference Date: 29-May-2020

FOOD SECURITY SNAPSHOT

- **Generally favourable weather conditions for crop development**
- **Average cereal import requirements forecast in 2020/21**
- **Food prices and inflation increasing**
- **High levels of food insecurity prevail**



Source: FAO/GIEWS, FEWSNET.



Source: FAO/GIEWS Earth Observation System.

Generally favourable weather conditions for crop development

Harvesting of the 2020 winter wheat and barley started in May in the eastern part of the country and will be completed by July by the harvesting of fields in the mountainous areas. Planting of spring wheat was completed in April. The majority of the wheat grown in the country is of rainfed winter cultivation.

Most of the country received timely and well-distributed rains and favourable crop conditions prevail. Severe precipitation deficits occurred in northern provinces where precipitation amounts were well below average until April 2020 and rainfed wheat conditions are below average. In these areas, reports indicate that planted area is below average.

Adequate snow volumes in mountainous areas during the winter are critical for crop development and availability of irrigation water for spring and summer crops. Snow water volumes are at average levels in most basins across the country, but remain low in the northeast.

While heavy precipitation in late March and April 2020 benefited crop development, it caused floods in Faryab, Badghis, Ghor, Baghlan, Takhar, Badakhshan and Parwan provinces, and landslides in Badakhshan and Ghor provinces. Spring floods caused only limited damage to the well-established winter cereal crops, but damaged agricultural infrastructure. Spring wheat was not yet planted.

Adequate precipitations benefitted pasture availability in most rangelands, supporting livelihoods relying on livestock rearing.

In the Nimruz Province adjacent to the Iranian border, a mature adult group of desert locusts was spotted in April 2020. Ground teams treated 20 hectares.

The 2020 cereal production is preliminarily forecast at a slightly above-average level of 5.7 million tonnes, although about 7 percent below the 2019 bumper harvest. The lack of certified seeds, particularly for rainfed areas, constrained yield potential.

Average cereal import requirements forecast

The cereal import requirements, mainly wheat and wheat flour, in the 2020/21 marketing year (July/June) are forecast at an average level of 2.8 million tonnes, 17 percent lower than in the previous year. Even during years with above-average domestic wheat production, the country imports large quantities of wheat flour due to the inadequate domestic milling capacity. Imported flour is often blended with domestic flour in order to improve its protein content.

Food prices and inflation increasing

Pakistan and Kazakhstan are the main sources of wheat and wheat flour of the country. Measures aimed at the containment of the COVID-19 pandemic in Pakistan temporarily restricted movement of goods across the border which, combined with panic-buying, put an upward pressure on prices. Wheat prices in Kabul increased by one-third from AFN 25 per kg in February 2020 to AFN 33 per kg in the second week of May. Wheat flour prices increased by 16 percent from AFN 31.25 to 36.50 per kg. The most dramatic price increases were recorded in March.

The Government of India pledged to provide 75 000 tonnes of wheat as humanitarian aid. The first shipment of 5 000 tonnes was dispatched in April, the second shipment of 10 000 tonnes in early May. Kazakhstan, an important supplier of wheat flour, replaced a ban on exports, announced in March 2020, with export quotas from May to August 2020, but announced it would abolish the quotas from June 2020.

The inflation rates, which were less than 4 percent in the first quarter of 2020, reached almost 8.7 percent in April 2020. The food component of the Consumer Price Index (CPI), which in the last 12 months fluctuated between 2.8 and 7 percent, increased dramatically to almost 17 percent in April 2020, fuelled by increased domestic demand as households stockpiled ahead of the pandemic. The overall inflation rate in the country is largely determined by changes in the prices of food products.

At the same time, purchasing power for casual labourers decreased as lockdown measures reduced employment opportunities. Localized protests against the high food prices took place in Nangarhar and Paktika provinces.

High levels of food insecurity

The food security situation worsened in recent months due to the impact of COVID-19 as informal labour opportunities and remittances declined. Between April and May 2020, about 10.9 million people (35 percent of the population) were estimated to be in acute food insecurity and required urgent humanitarian action. It included around 7.4 million people in IPC Phase 3: “Crisis” and 3.5 million people in IPC Phase 4: “Emergency”. Food security in rural areas is likely to improve with the completion of the harvest and about 10.3 million people are forecast to be in IPC Phases 3 and 4 between June and November 2020. However, the food security of the vulnerable populations, including IDPs and the urban poor, is likely to deteriorate as curfews and restrictions on movements to

Afghanistan

Cereal Production

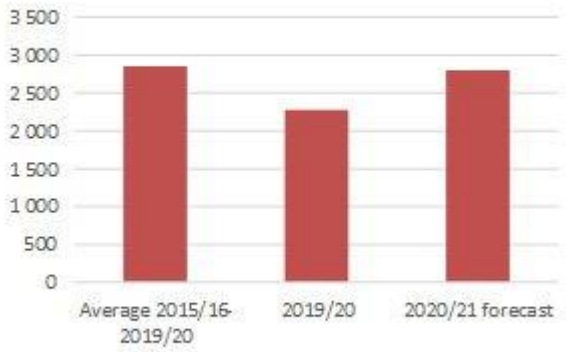
	2015-2019 average	2019	2020 forecast	change 2020/2019
	000 tonnes			percent
Wheat	4 437	5 100	4 700	-7.8
Rice (paddy)	551	580	520	-10.3
Maize	306	300	300	0.0
Others	200	100	160	60.0
Total	5 494	6 080	5 680	-6.6

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

Afghanistan

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.

contain the COVID-19 outbreak would limit the employment opportunities for casual labourers.

Between January and April 2020, about 267 000 returnees from the Islamic Republic of Iran and 1 700 from Pakistan were recorded, well above the number of the returnees recorded in the same period in 2019 (147 000 from the Islamic Republic of Iran and 9 000 from Pakistan). Among the most frequently reported reasons to return from the Islamic Republic of Iran were the fear of COVID-19, lack of employment opportunities and abuse by authorities. Many Afghan returnees end up displaced and in need of humanitarian assistance.

COVID-19 and measures adopted by the Government

On 14 March 2020, the Government introduced a variety of measures to contain the spread of the disease. The implementation details were left to the provincial governments that imposed curfews, restrictions on the number of people traveling together in one vehicle and on inter-city travel. Many provinces eased the rules ahead of the Ramadan. Lockdown policies were lifted on 24 May 2020 coinciding with Eid al-Fitr.

Even before the COVID-19 pandemic, protracted conflict has tested the governance systems responsible for delivering the basic services. Continuing tensions, coupled with repeated natural disasters, migration, poverty and high population density in urban centres, facilitate the transmission and increase the impact of the pandemic.

Despite the efforts to keep the key supply routes from Pakistan open, sporadic closings of the border in March and April resulted in decreased availability of food, including wheat flour, and disruptions in movement of humanitarian aid. From 15 May 2020, the Torkham and Spin Boldak border crossings were opened to cargos for six days per week without limits on the number of trucks. Regarding the movement of people, borders have been generally closed, but, starting from 1 May 2020, stranded citizens of both Pakistan and Afghanistan have been allowed to cross on foot once a week.

Border crossings with the Islamic Republic of Iran remain open to commercial traffic and crossings of citizens. As described above, large numbers of Afghans have returned home following an outbreak of COVID-19 in the Islamic Republic of Iran. Borders with other countries are open for commercial traffic and the return of citizens.

Although COVID-19 containment measures have not affected the activities related to crop production, it is reported that seasonal movements of Kuchis pastoralists in the northern part of the country towards summer pastures have been limited by restrictions.

In May 2020, the Government began distributing free bread as prices increased amidst supply disruptions during the COVID-19 shutdown. More than 250 000 families in Kabul started receiving ten flat breads per day in the first phase of the project.

The Government made available USD 15 million to respond to the COVID-19 outbreak and an additional USD 10 million was allocated from the reserve funds for Ministry of Public Health. As of 18 May 2020, USD 600 million of foreign aid was pledged to support COVID-19 efforts in the country, including USD 100 million provided by the World Bank and USD 200 million in loans from the International Monetary Fund.

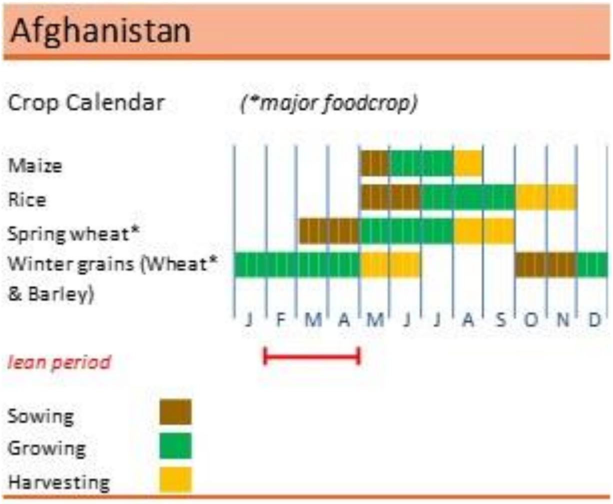
Food and Agriculture Organization of the United Nations

GIEWS Country Brief
Afghanistan

Reference Date: 09-December-2019

FOOD SECURITY SNAPSHOT

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



Source: FAO/GIEWS, FEWSNET.

Favourable rains facilitate planting and secure moisture reserves for crop development

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

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

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

Afghanistan

Cereal Production

	2014-2018 average	2018	2019 estimate	change 2019/2018
	000 tonnes			percent
Wheat	4 491	3 580	5 100	42.5
Rice (paddy)	595	526	580	10.4
Maize	309	300	300	0.0
Others	285	67	100	49.3
Total	5 681	4 473	6 080	35.9

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

Above-average cereal harvest gathered in 2019 due to favourable weather conditions

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

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

Decreasing cereal import requirements in 2019/20

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

Prices of wheat increasing or stable, levels of inflation easing

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

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

High levels of food insecurity

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

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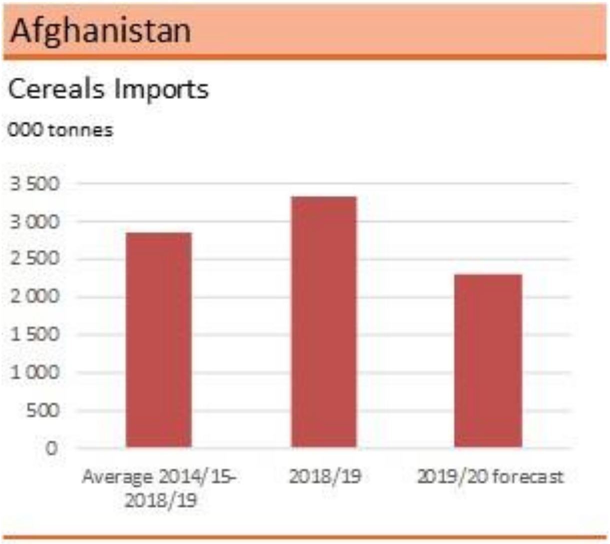
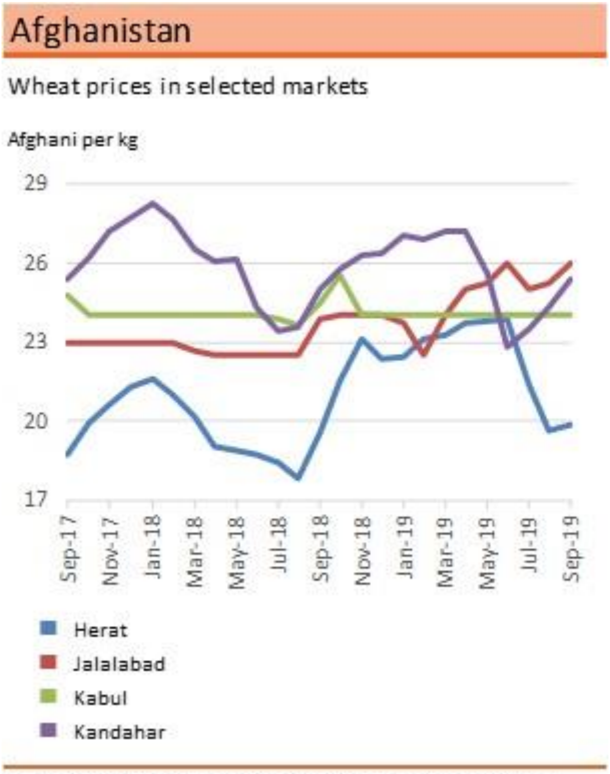


Note: Includes rice in milled terms. Split year refers to individual crop marketing years (for rice, calendar year of second year shown).
Source: FAO/GIEWS Country Cereal Balance Sheets.



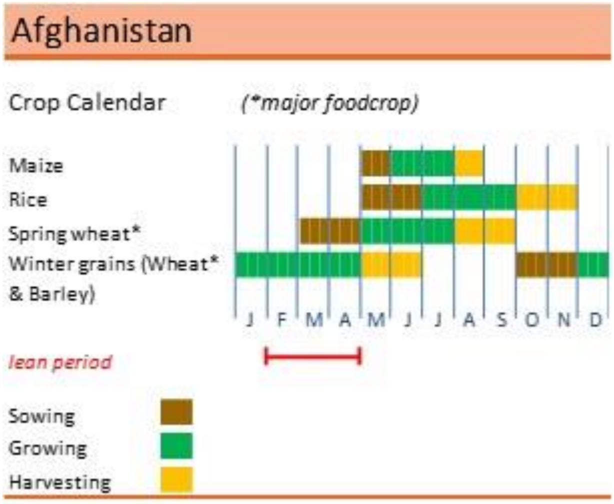
Source: FAO/GIEWS Food Price Monitoring and Analysis Tool.

GIEWS Country Brief
Afghanistan

Reference Date: 04-March-2019

FOOD SECURITY SNAPSHOT

- **Favourable autumn rains facilitate planting and secure moisture reserves for crop development**
- **Below-average cereal harvest gathered in 2018 following dry weather conditions**
- **Cereal import requirements in 2018/19 increasing**
- **Prices of wheat stable or increasing, inflation low**
- **High levels of food insecurity prevail**



Source: FAO/GIEWS, FEWSNET.

Afghanistan

Cereal Production

	2013-2017 average	2017	2018 estimate	change 2018/2017
	000 tonnes			percent
Wheat	4 809	4 280	3 613	-15.6
Rice (paddy)	643	505	526	4.1
Barley	367	95	57	-40.0
Others	321	315	310	-1.6
Total	6 141	5 195	4 506	-13.3

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

Favourable rains facilitate planting and secure moisture reserves for crop development

The winter wheat and barley crops, planted in October and November 2018, will be harvested from May. The majority of the wheat grown in the country is a winter variety. Sowing of spring wheat, grown mostly in northeastern mountainous areas where early freezing in autumn prevents cultivation of winter cereals, is expected to start in March.

Unlike the previous season that was characterized by a late onset of the rains and a below-average snow pack, which constrained supplies of irrigation water, timely rains in autumn 2018 brought adequate precipitation over most of the country facilitating planting. In the north and northeastern provinces, above average precipitation amounts were recorded, while average conditions prevailed in central and western regions. Sufficient snow volumes in the mountains provided adequate moisture reserves for crop development as well as secured availability of irrigation water for spring crops. As of early February 2019, minor precipitation deficits prevailed in southern provinces, but were likely compensated by upcoming spring precipitation.

Reports indicate lower-than-usual seed availability particularly in remote areas due to limited seed distribution by the Government and other actors as well as the lower harvest in the previous season.

Below-average cereal harvest gathered in 2018 due to dry weather

Lower-than-average precipitation, coupled with above normal temperatures prevalent throughout the Central Asia region during the season, constrained cereal production to 4.5 million tonnes. The wheat production estimate indicates a 16 percent reduction from the previous year and a decline of 25 percent compared to the five-year average. With localized exceptions, below-average precipitations also have constrained pasture availability in most rangelands, compromising livelihoods relying on livestock rearing.

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

Increasing cereal import requirements in 2018/19

The cereal import requirements (mainly wheat) in the 2018/19 marketing year (July/June) are forecast at 3.4 million tonnes, 15 percent higher than in the previous year and over 35 percent above the five-year average. Even during years with above-average domestic wheat production, the country imports large quantities of wheat flour reflecting the lack of adequate domestic milling capacity. Imported flour is often blended with domestic wheat in order to improve its protein content.

Prices of wheat increasing or stable, levels of inflation low

Despite the below average domestic cereal harvest, prices of wheat grain increased in some markets, while remaining stable in others, constrained by export availability and price stability in both Pakistan and Kazakhstan, the main sources of wheat and wheat flour of the country.

Inflation rates, which were negative in spring 2018, reached 1 percent in November 2018 (last data available). The food component of the CPI, which has been negative since March 2018, recorded a negative 1.6 percent in March 2018, compared to around 10 percent in early 2017. Low inflation rates were supported by declining international energy and food prices as well as weak domestic demand resulting from the deteriorating domestic security situation.

High levels of food insecurity

As of September 2018, about 9.8 million people (44 percent of the rural population) were estimated to be in Food Crisis and Emergency (IPC Phase 3 and Phase 4). An estimated 2.6 million people are classified in IPC Phase 4 nationwide requiring urgent action to reduce their food deficits and to protect their livelihoods. The current estimates of people in Phase 3 and Phase 4 correspond to a 17.4 percent increase compared to the previous analysis for the same period in 2017. Projections suggest that from November 2018 to February 2019, the total population in IPC Phase 3 and Phase 4 is expected to increase to 10.6 million (47 percent of the rural population). Continuing conflict, natural hazards and limited economic opportunities have increased the vulnerability of the poorest households, including subsistence farmers.

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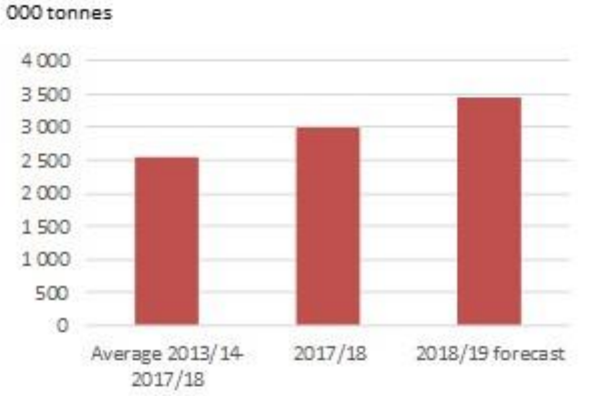
Afghanistan

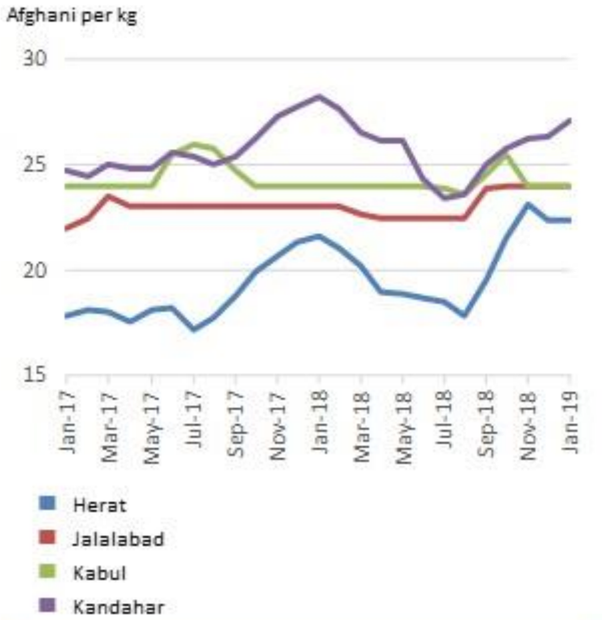
Cereals Imports



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.

Afghanistan

Wheat prices in selected markets



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

Food and Agriculture Organization of the United Nations

GIEWS Country Brief
Afghanistan

Reference Date: 21-June-2018

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

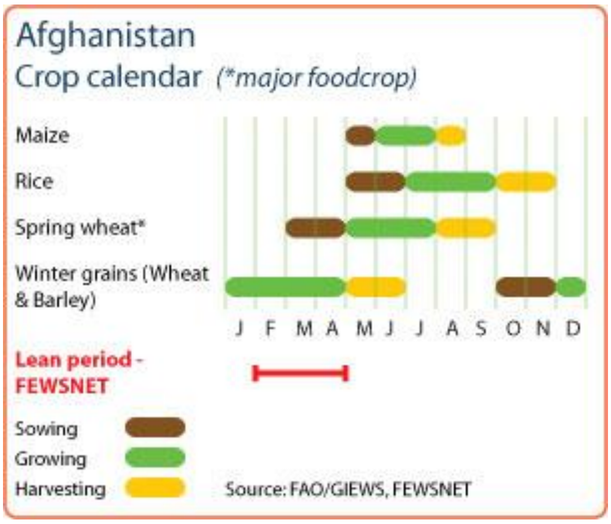
Below average cereal output forecast in 2018 following dry weather conditions

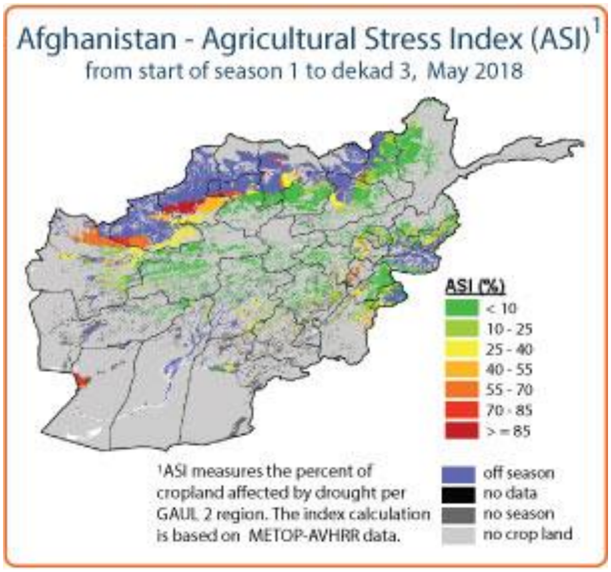
The winter wheat and barley harvest started in May and will finish by the end of June. The spring wheat harvest will continue in the mountainous areas in the northeast until the end of September.

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

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

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





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

Increasing cereal import requirements in 2018/19

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

Wheat prices generally stable, levels of inflation easing

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

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

High levels of food insecurity

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

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

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Afghanistan

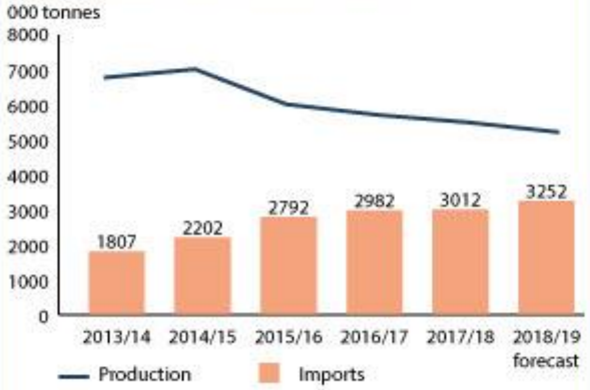
Cereal production

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

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

Afghanistan

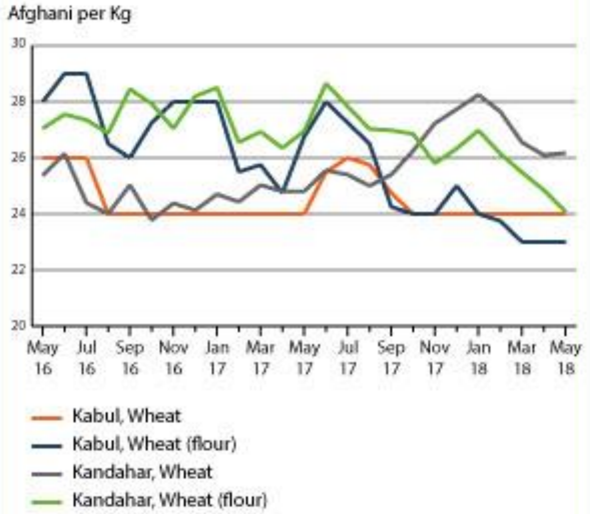
Total cereal production and imports



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

Afghanistan

Retail prices of wheat and wheat flour



Source: Vulnerability Analysis and Mapping (VAM) - WFP

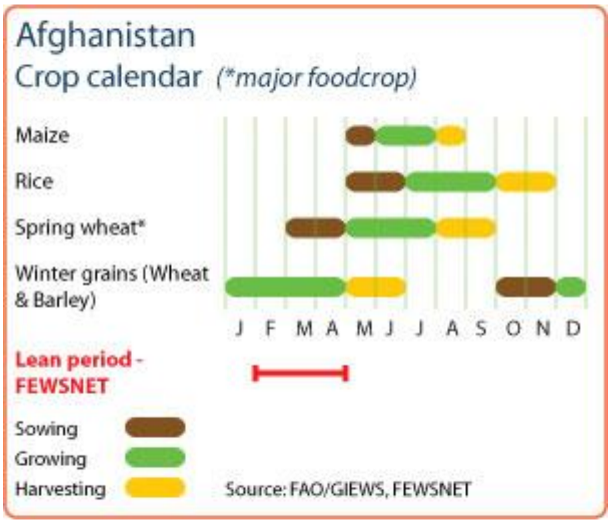
Food and Agriculture Organization
of the United Nations

GIEWS Country Brief
Afghanistan

Reference Date: 25-September-2017

FOOD SECURITY SNAPSHOT

- **Below average cereal output forecasted for 2017 following dry weather conditions in autumn**
- **Cereal import requirements in 2017/18 forecast at levels similar to 2016/17, but 25 percent above average**
- **Wheat prices generally stable, inflation easing**
- **Food insecurity on the rise**



Afghanistan
Cereal production

	2012-2016 average	2016	2017 forecast	change 2017/2016
	000 tonnes			percent
Wheat	4,963	4,554	4,280	-6
Rice (paddy)	683	532	500	-6
Barley	421	400	400	0
Others	324	320	320	0
Total	6,391	5,806	5,500	-5

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

Below average cereal output forecasted for 2017 following dry weather conditions in autumn

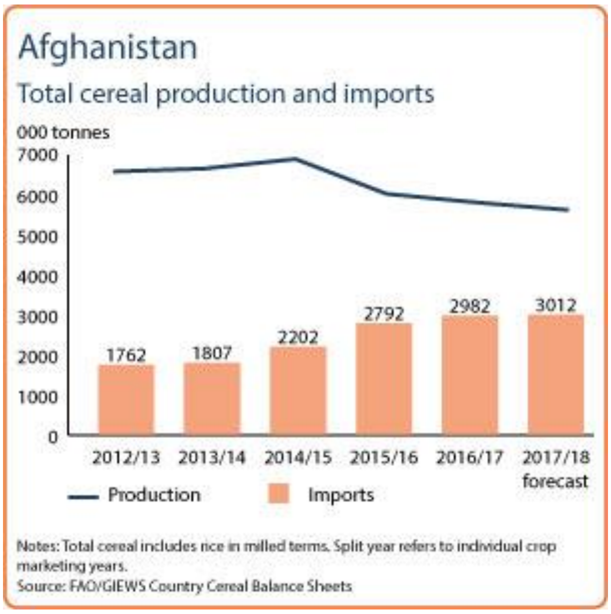
The winter wheat and barley harvest finished in June, while the spring wheat harvest will continue in the mountainous areas in the northeast until the end of September. Dry weather conditions and resulting limited soil moisture in the autumn of 2016 delayed winter grain plantings in some areas and some farmers switched to spring wheat. The rains and high elevation snow resumed in January 2017, ending an early season dryness across most of the country. A concern remains in the north and northeast due to a delayed onset of seasonal rains and prolonged dry periods impacting the rainfed cropping areas as well as pastures of Badakhshan, Samangan, Baghlan, and Takhar provinces. Total wheat production in 2017 is forecast at 4.28 million tonnes, almost 16 percent below the five-year average.

The bulk of farmers rely on their own farm-saved seeds. Households with low purchasing power in some areas are eligible for subsidies for improved seeds. For the 2017/18 cropping season, the Ministry of Agriculture, Irrigation and Livestock plans to distribute 10 000 tonnes of certified wheat seeds to be distributed to 200 000 farming households, sufficient to plant about 68 000 hectares (out of 2.3 million hectares of wheat planted in 2016). The FAO and some NGOs provide some certified wheat seeds and other inputs, although the amounts are low compared to the total needs.

The 2016 Opium Survey (currently the last available) revealed that in 2016 the total area under opium poppy cultivation (201 000 hectares) increased by 10 percent compared to the previous year. Potential opium production was estimated at 4 800 tonnes, with an increase of 43 percent from the 2015 level of 3 300 tonnes, but still below the 2014 production of 6 400 tonnes. Strong opium production increases were noted particularly in the areas where the security situation has deteriorated since 2015, such as the Northern Region and in Badghis Province.

Cereal import requirements in 2017/18 similar to previous year

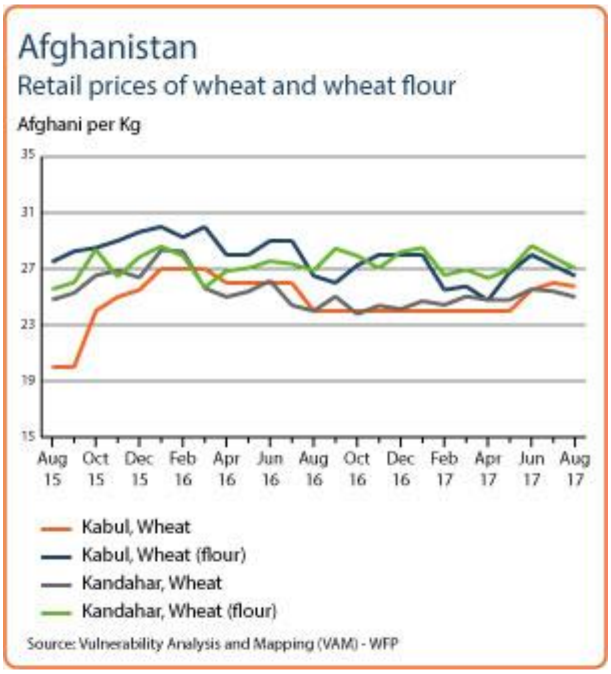
Cereal import requirements (mainly wheat) in the current 2017/18 marketing year (July/June) are forecast at 3 million tonnes, about the same as in the previous year and 25 percent above the five-year average. Even in years with above average domestic production, the country imports significant quantities of wheat flour, reflecting the lack of adequate domestic milling capacity and problems of cost effectiveness. The main suppliers of wheat flour are Kazakhstan and Pakistan. Imported wheat and wheat flour are often blended with domestic wheat to improve its protein content.



Wheat prices generally stable, levels of inflation easing

Between August 2016 and May 2017, wheat grain prices remained generally stable. A less than 10 percent increase was observed between May and July 2017 when the local winter wheat harvest neared completion. With improved availability on local markets, prices have eased. Large price differentials persist among different areas of the country: wheat grain is almost 30 percent more expensive in Kandahar than in Herat.

Inflation rates have eased in July 2017, mainly due to the relatively stable exchange rate between the Afghani and the US dollar supported by lower global goods and energy prices. In July 2017, the CPI was up 5.1 percent relative to the same period last year, a decline from over 7 percent in May and June 2017. The food component of the CPI increased by 7.4 percent in July 2017, less than around 10 percent recorded about the same as in the previous month.



Food insecurity on the rise

Overall food insecurity in the country is on the rise, with almost 1.6 million people (6 percent of the population) considered to be severely food insecure and 9.7 million people (34 percent of the population) being moderately food insecure. Continuing conflict, natural hazards and limited economic opportunities increase the vulnerability of the poorest households, including subsistence farmers.

The total number of individuals displaced by the conflict in 2016 is estimated at about 636 500. A large share of displacements are located in the hard-to-access areas. Since January 2017, some 200 000 individuals have fled their homes. Documented and undocumented Afghans have been returning to the country for a variety of reasons, including from the deteriorating protection space in Pakistan and the Islamic Republic of Iran. So far in 2017, almost 84 000 Afghans returned from Pakistan and 230 000 from the Islamic Republic of Iran, adding to 700 000 undocumented Afghans who returned to the country in 2016. Most returnees need support to be socially and economically reintegrated.

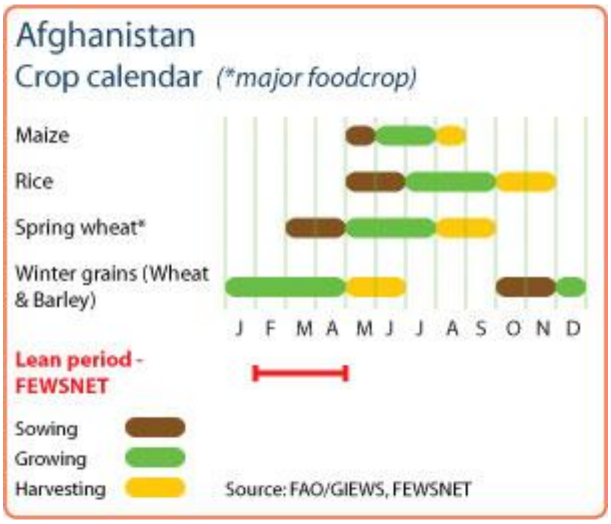
Food and Agriculture Organization of the United Nations

GIEWS Country Brief
Afghanistan

Reference Date: 06-February-2017

FOOD SECURITY SNAPSHOT

- **Mixed prospects for 2017 winter grains following dry weather conditions in autumn**
- **Slightly below-average cereal crop harvested in 2016**
- **Cereal import requirements in 2016/17 forecast at levels similar to 2015/16**
- **Wheat prices stable, inflation easing**
- **Food insecurity on the rise**



Afghanistan
Cereal production

	2011-2015 average	2015	2016 estimate	change 2016/2015
	000 tonnes			percent
Wheat	4 730	4 673	4 554	-3
Rice (paddy)	711	612	620	1
Barley	402	403	400	-1
Others	324	335	320	-4
Total	6 167	6 023	5 894	-2

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

Mixed prospects for 2017 winter grains

Planting of winter barley and wheat for harvesting from May 2017 was completed by the end of November. Dry weather conditions and resulting limited soil moisture delayed plantings in some areas, while some farmers postponed wheat planting until spring. Official estimates for planted area are not yet available.

Current weather conditions remain relatively favourable for cereal crop development after the rains and high elevation snow resumed in January and ended an early season dryness across most of the country. However, as of the end of January, abnormal dryness persisted in western parts of the country, from Jawzjan Province in the north to Hilmand Province in the south. In the northern and eastern part of the country, the snow water equivalent – an important source of irrigation water – remains on par with average values for the season.

The bulk of farmers rely on their own farm-saved seeds. Households with low purchasing power in some areas are eligible for subsidies for improved seeds. In the current planting season, about 10 000 tonnes of certified wheat seeds were distributed by the Government, FAO, and NGOs. Around 98 percent of the seeds were used on irrigated land with an average seeding rate of 150 kg per hectare, making the amount sufficient to plant around 67 000 hectares.

Slightly below-average cereal crop harvested in 2016

Final production estimates by the Ministry of Agriculture, Irrigation and Livestock (MAIL) indicate that 4.55 million tonnes of wheat were harvested in 2016, only slightly below last year's harvest and the five-year average. Some 3.7 million tonnes were produced under irrigated conditions and 830 000 tonnes from rainfed areas. While the total wheat cultivated area increased by 9.5 percent compared to the previous year to 2.3 million hectares, the average yield declined by 8 percent on last year's level to 1.98 tonnes per hectare due to pests and wheat rust.

The 2016 Opium Survey revealed that in 2016 the total area under opium poppy cultivation (201 000 hectares) increased by 10 percent compared to the previous year. Potential opium production was estimated at 4 800 tonnes, with an increase of 43 percent from the 2015 level of 3 300 tonnes, but still below the 2014 production of 6 400 tonnes. Strong opium production increases were noted particularly in the areas where the security situation has deteriorated since 2015, such as the Northern region and in Badghis Province.

Wheat import requirements in 2016/17 similar to previous year

Cereal import requirements (mainly wheat) in the current 2016/17 marketing year (July/June) are forecast at 2.6 million tonnes, about the same as in the previous year and slightly above the five-year average. Even in years with above average domestic production, the country imports wheat flour, reflecting the lack of adequate domestic milling capacity and problems of cost effectiveness. The dominant suppliers of wheat flour are Kazakhstan and Pakistan. Imported wheat and wheat flour are often blended with domestic wheat to improve its protein content.

Wheat prices stable, levels of inflation easing

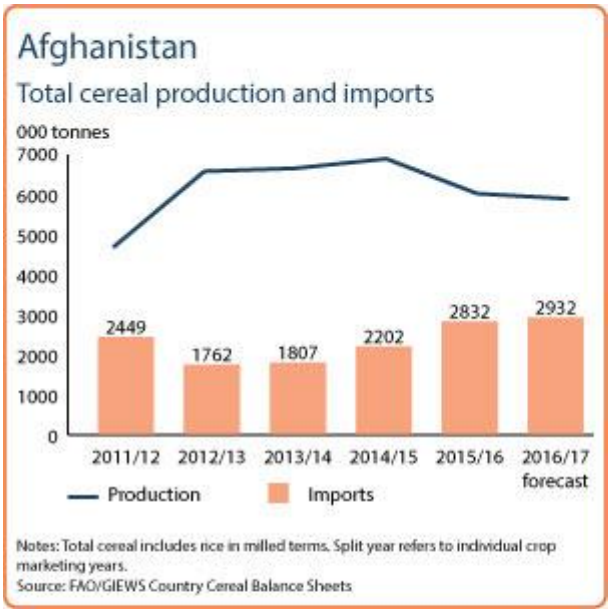
In the last six months to January 2017, wheat grain prices in Kabul and Kandahar markets remained stable, while wheat flour prices experienced greater volatility. Large price differentials persist among different areas of the country: wheat grain is almost 30 percent more expensive in Kandahar than in Herat.

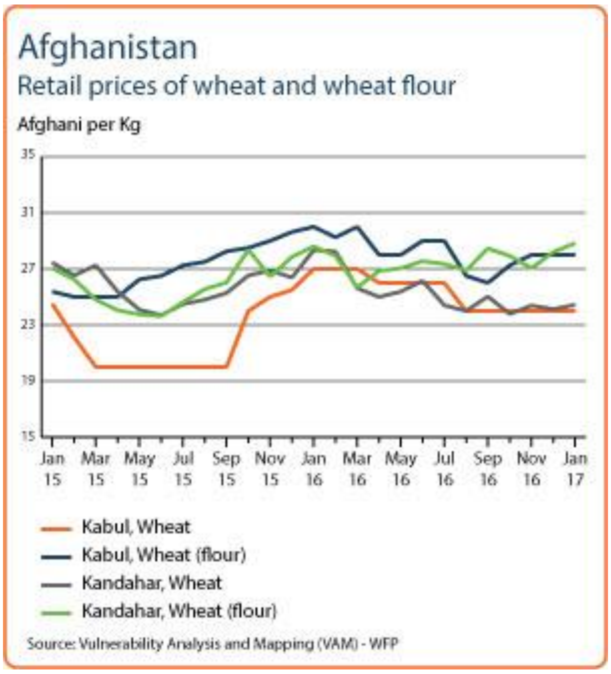
Inflation rates have eased towards the end of 2016, mainly due to the relatively stable exchange rate between the Afghani and the US dollar supported by lower global goods and energy prices. In November 2016, the CPI was up nearly 4.6 percent relative to the same period last year, a slight decline from the almost 6 percent in July 2016. The food component of the CPI increased by 6.6 percent, about the same as in the previous month.

Food insecurity on the rise

Overall food insecurity in the country is on the rise, with almost 1.6 million people (6 percent of the population) considered to be severely food insecure and 9.7 million people (34 percent of the population) being moderately food insecure. Continuing conflict, natural hazards and limited economic opportunities increase the vulnerability of the poorest households, such as subsistence farmers.

The total number of individuals displaced by the conflict in 2016 is estimated at 636 503. A large share of displacements are located in the hard to access areas. In 2017 so far, 2 864 individuals have been verified as displaced. Both documented and undocumented Afghans have been returning for a variety of reasons, including the deteriorating protection space in Pakistan. Many of those returning have lived outside of Afghanistan for decades and need the support from the Government and humanitarian actors both on arrival and during the reintegration into a country already struggling with widespread conflict and displacement. Since 1 January 2016, over 728 000 undocumented Afghans have returned. Until 31 December 2016, 372 392 documented refugees returned from Pakistan and the





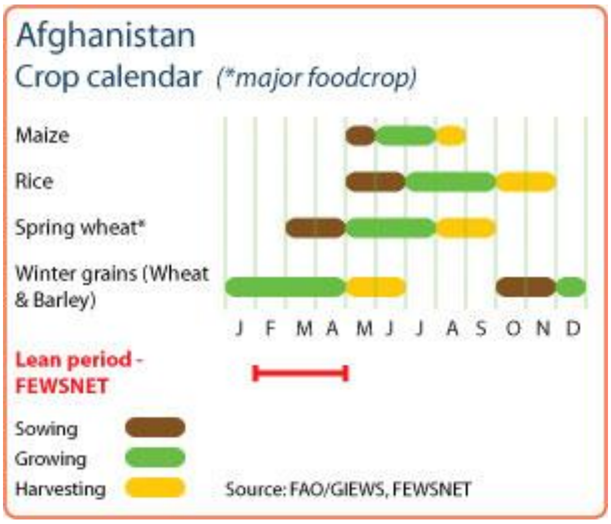
Islamic Republic of Iran. No registered refugees from Pakistan were recorded in the last seven weeks as the winter pause in the repatriation programme continues.

Food and Agriculture Organization
of the United Nations

GIEWS Country Brief
Afghanistan

Reference Date: 12-September-2016

FOOD SECURITY SNAPSHOT
- **Despite dry spell in autumn, only slightly below-average cereal crop harvested in 2016**
- **Cereal import requirements in 2016/17 forecast at levels similar to 2015/16**
- **Inflation increasing owing to currency depreciation**



Despite dry spell in autumn, only slightly below-average cereal crop harvested in 2016

Harvesting of the 2016 winter grains, mainly wheat, concluded in June. Final production estimates from the Ministry of Agriculture, Irrigation and Livestock (MAIL) indicate that 4.55 million tonnes of wheat were harvested, only slightly below last year's harvest and the five-year average. Some 3.7 million tonnes were produced under irrigated conditions and 830 000 tonnes from rainfed areas. While total wheat cultivated area increased by 9.5 percent compared to the previous year to 2.3 million hectares, pests and wheat rust decreased the average yield to 1.98 tonnes per hectare, down 8 percent on last year.

A small maize crop is usually harvested in August, while the rice harvest starts in October. Vegetable production in the country improved in 2016 compared to the previous years but the lack of adequate capacity remains a constraint in marketing the production.

Seed availability for the 2016/17 planting season, starting in late September, is reported to be worse than in the past seasons. The Ministry of Agriculture, Irrigation and Livestock (MAIL) and humanitarian agencies are looking for certified wheat seed for distribution. In the past, improved seed availability, through private companies, together with the provision of subsidized improved seeds to farmers by MAIL, assisted crop productivity. Nevertheless, the bulk of farmers still rely on their own farm-saved seeds. Households with low purchasing power in some areas are eligible for subsidies for improved seeds. Further support to the seed industry is crucial for the availability of certified wheat seed to farmers in the future.

Elsewhere in the sector, the 2015 Opium Survey in Afghanistan revealed that in 2015 the total area under opium poppy cultivation (183 000 hectares) decreased by 19 percent compared to the previous year, whereas potential opium production was estimated at 3 300 tonnes, a decrease of 48 percent from its 2014 level (6 400 tonnes).

Afghanistan
Cereal production

	2011-2015 average	2015	2016 forecast	change 2016/2015
	000 tonnes			percent
Wheat	4 730	4 673	4 554	-3
Rice (paddy)	711	612	620	1
Barley	402	403	400	-1
Others	324	335	320	-4
Total	6 167	6 023	5 894	-2

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

Wheat import requirements in 2016/17 similar to previous year

Cereal import requirements (mainly wheat) in the current 2016/17 marketing year (July/June) are forecast at 2.7 million tonnes, about the same as in the previous year and slightly above the five-year average. Even in years with above average domestic production, Afghanistan imports wheat flour, reflecting lack of adequate domestic milling capacity and problems of cost effectiveness. The dominant suppliers of wheat flour are Kazakhstan and Pakistan. Imported wheat and wheat flour are often blended with domestic wheat to improve its protein content.

Wheat prices down, but levels of inflation increasing

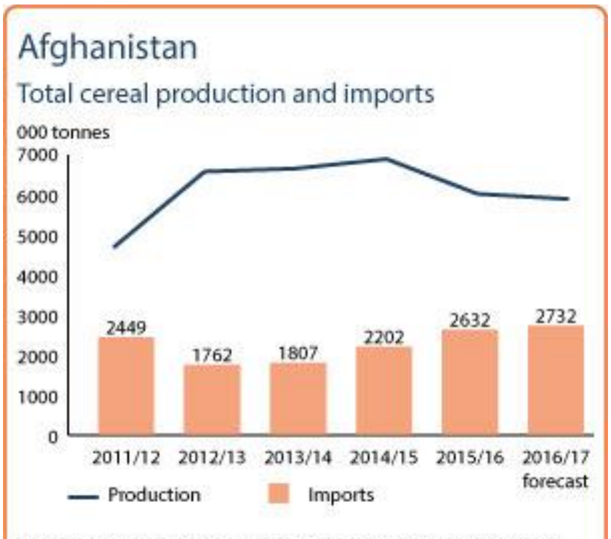
In the last six months to August 2016, wheat grain and wheat flour prices in Kabul and Kandahar decreased between 4 percent (in the case of wheat flour) to 15 percent (in the case of wheat grain), reflecting the harvest but remained close to, or slightly above, their levels from one year ago. Large regional price differences persist: wheat grain is almost 30 percent more expensive in Kandahar than in Herat.

Inflation rates have increased due mainly to raising import costs caused by the continuing depreciation of the Afghani against the US dollar, although lower global goods and energy prices are mitigating the impact. In July 2016, the CPI in Kabul was up nearly 8 percent relative to the same period last year. The food component of the CPI increased by 9.2 percent, while the non-food component increased by 7.2 percent.

Stable food security situation overall, but concern remains in some areas for low-income and displaced people

The overall food security situation has generally been stable owing to the above average harvest in the past years. However, fighting between the Government and insurgent forces resulted in further displacement. More than 220 000 people fled their homes in the beginning of 2016.

According to the Integrated Food Security Phase Classification (IPC) from September 2015 (last available), six provinces are classified in Phase 2: “Stressed” and 12 in Phase 3: “Crisis”. Out of 12 provinces in Phase 3, three provinces Badhakshan, Kunduz and Paktika have 10-15 percent of the population in Phase 4: “Emergency”.



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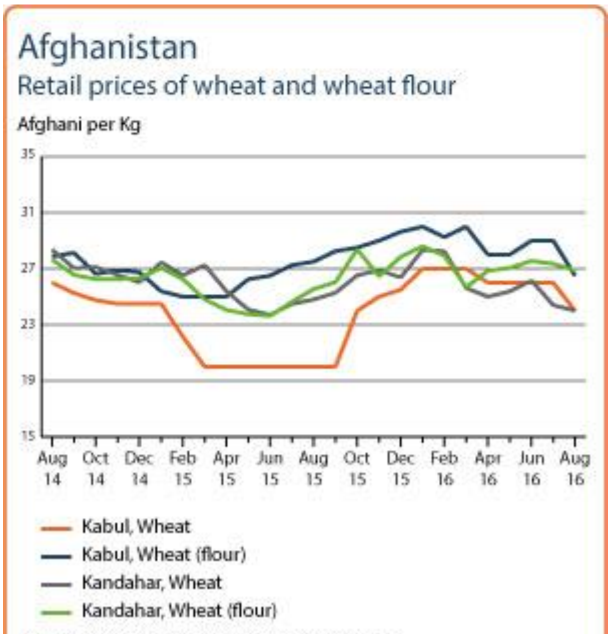


Source: Vulnerability Analysis and Mapping (VAM) - WFP

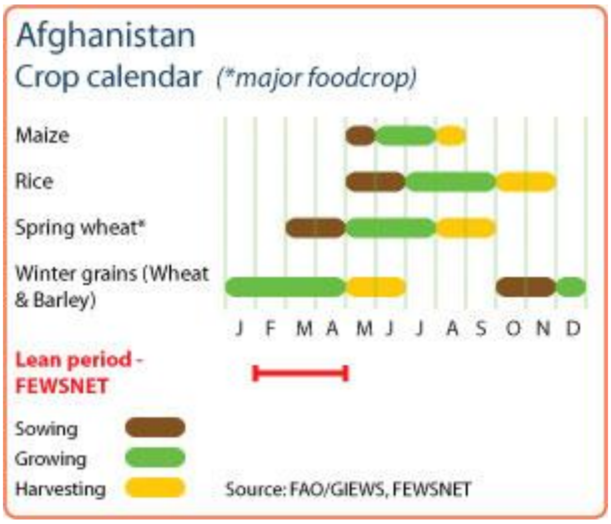
Food and Agriculture Organization of the United Nations

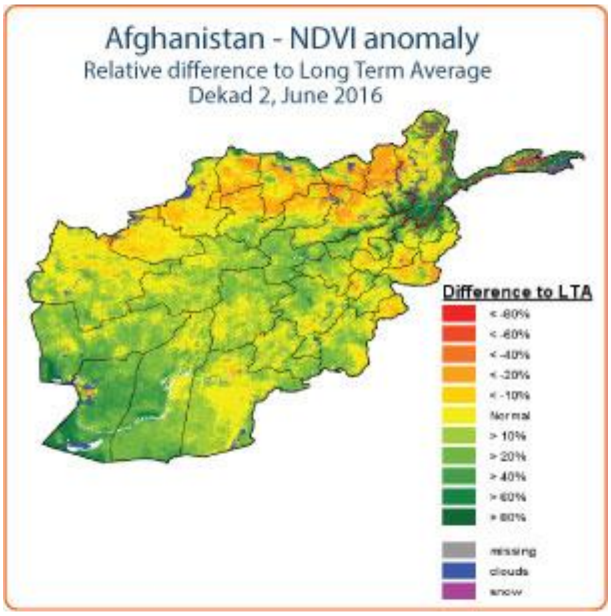
GIEWS Country Brief
Afghanistan

Reference Date: 15-July-2016

FOOD SECURITY SNAPSHOT

- **Despite dry spell in autumn, slightly below average cereal crop harvested in 2016**
- **Cereal import requirements in 2016/17 forecast at levels similar to 2015/16**
- **Inflation increasing owing to currency depreciation**





Despite dry spell in autumn, slightly below average cereal crop harvested in 2016

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Planting across the country was mostly completed in November 2015 although in some parts of Nimroz, Hirat and Baghlan provinces it continued until December because of an extended dry spell which followed an early onset of the wet season. Unlike in the 2014/15 winter, snow accumulation was closer to a long-term average, although some provinces report below average cumulative precipitation. Snow runoffs from the mountains normally provide over 80 percent of the irrigation water.

Late and well-distributed spring rains benefited crops but also contributed to favourable pasture conditions.

Improved seed availability, through private companies together with the provision of subsidized improved seeds to farmers by the Ministry of Agriculture, Irrigation and Livestock (MAIL), assisted crop productivity. Nevertheless, the bulk of the farmers still relied on their own farm-saved seeds. Households with low purchasing power in some areas are eligible for subsidies for improved seeds.

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Wheat prices up, but levels of inflation easing

Despite a series of well above-average harvests gathered since 2012, wheat and wheat flour prices in some provinces have been increasing since June 2012 compared to their pre-2012 levels. In the last six months to June 2016, wheat grain and wheat flour prices in Kabul and Kandahar remained stable but between 9 percent (in the case of wheat flour) to 30 percent (in the case of wheat grain) above their levels one year ago. Large regional price differences persist: wheat grain is over 35 percent more expensive in Kandahar than in Herat.

Inflation rates have increased due mainly to raising import costs caused by continuing depreciation of the Afghani against the US dollar, although lower global goods and energy prices are mitigating the impact. In June 2016, the CPI in Kabul was close to 6.4 percent relative to the same period last year. The food component of the CPI increased by 6.3 percent, while the non-food component increased by 6.5 percent.

Stable food security situation overall, but concern remains in some areas for low-income and displaced people

The overall food security situation has generally been stable owing to the above-average harvest in the past years. However, fighting between the Government and insurgent forces resulted in further displacement.

According to the Integrated Food Security Phase Classification (IPC) from September 2015, six provinces are classified in Phase 2 “Stressed” and 12 in Phase 3 “Crisis”. Out of 12 provinces in Phase 3, three provinces Badhakshan, Kunduz and Paktika have 10 to 15 percent of the population in Phase 4 “Emergency”.

Afghanistan
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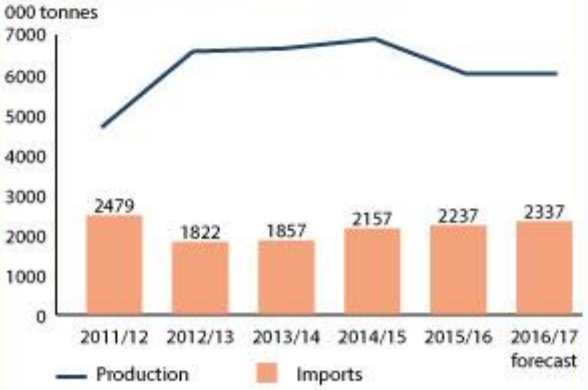
Afghanistan
Total cereal production and imports



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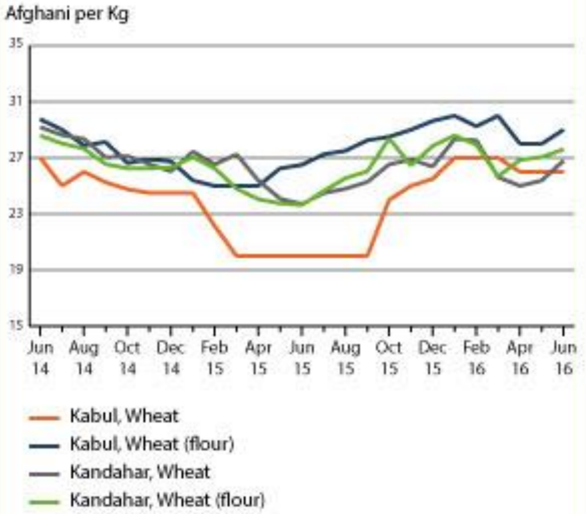
Afghanistan
Retail prices of wheat and wheat flour



Source: Vulnerability Analysis and Mapping (VAM) - WFP

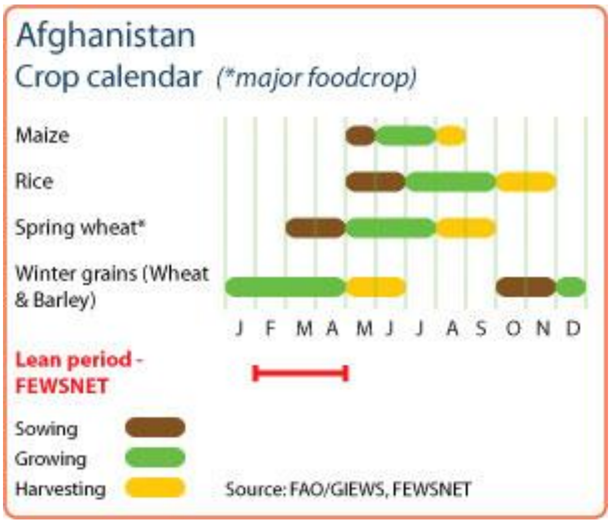
Food and Agriculture Organization of the United Nations

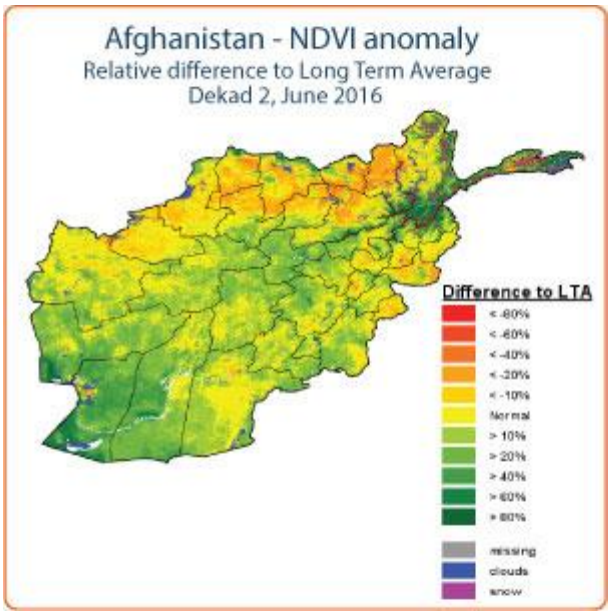
GIEWS Country Brief
Afghanistan

Reference Date: 15-July-2016

FOOD SECURITY SNAPSHOT

- **Despite dry spell in autumn, slightly below average cereal crop harvested in 2016**
- **Cereal import requirements in 2016/17 forecast at levels similar to 2015/16**
- **Inflation increasing owing to currency depreciation**





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Planting across the country was mostly completed in November 2015 although in some parts of Nimroz, Hirat and Baghlan provinces it continued until December because of an extended dry spell which followed an early onset of the wet season. Unlike in the 2014/15 winter, snow accumulation was closer to a long-term average, although some provinces report below average cumulative precipitation. Snow runoffs from the mountains normally provide over 80 percent of the irrigation water.

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Despite a series of well above-average harvests gathered since 2012, wheat and wheat flour prices in some provinces have been increasing since June 2012 compared to their pre-2012 levels. In the last six months to June 2016, wheat grain and wheat flour prices in Kabul and Kandahar remained stable but between 9 percent (in the case of wheat flour) to 30 percent (in the case of wheat grain) above their levels one year ago. Large regional price differences persist: wheat grain is over 35 percent more expensive in Kandahar than in Herat.

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Afghanistan
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Afghanistan
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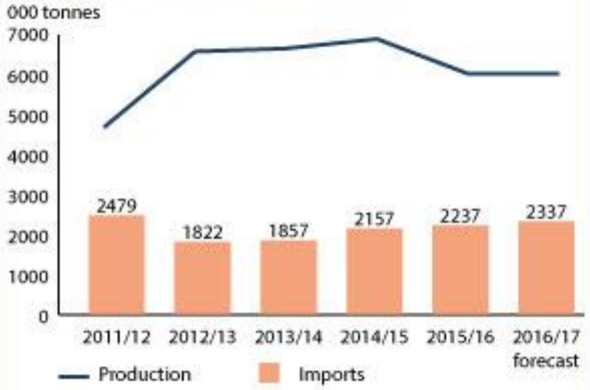

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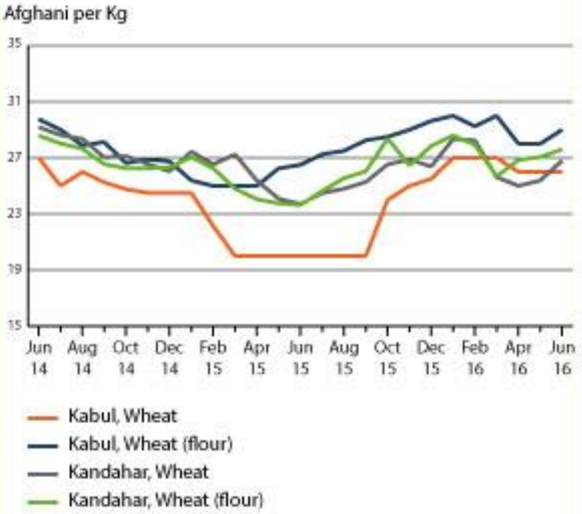
Afghanistan
Retail prices of wheat and wheat flour



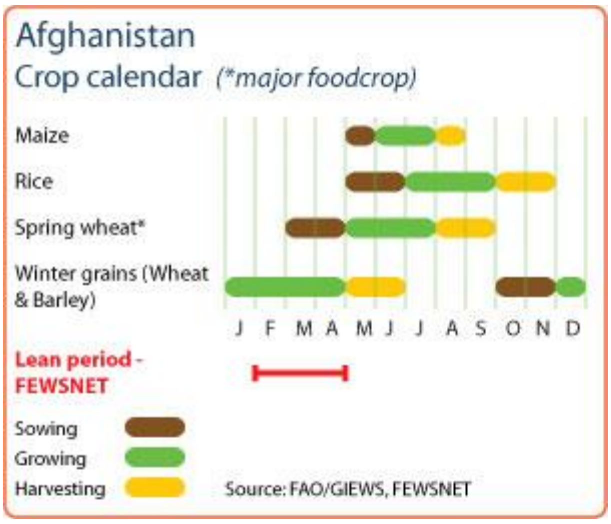
Source: Vulnerability Analysis and Mapping (VAM) - WFP

Food and Agriculture Organization
of the United Nations

GIEWS Country Brief
Afghanistan

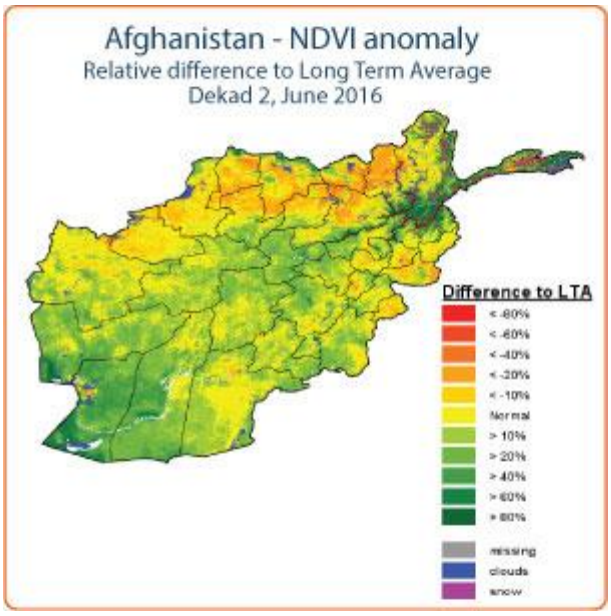
Reference Date: 11-July-2016

FOOD SECURITY SNAPSHOT
- **Despite dry spell in autumn, average cereal crop expected in 2016**
- **Cereal import requirements in 2016/17 forecast at levels similar to 2015/16**
- **Inflation increasing owing to currency depreciation**



Despite dry spell in autumn, average cereal crop expected in 2016

Harvesting of the 2016 winter grains, mainly wheat, started in May and concluded in June. A pre-harvest assessment supplemented by remote sensed information suggests a close-to-average cereal crop. Final production estimates should be available later in July. On average, about 2.2 million hectares are cultivated with wheat annually and about 90 percent of the wheat crop is planted in the autumn months. Reports indicate that more area was planted with wheat in 2015 (for harvest in 2016) than in 2014.



Planting across the country was mostly completed in November 2015 although in some parts of Nimroz, Hirat and Baghlan provinces it continued until December because of an extended dry spell which followed an early onset of the wet season. Unlike in the 2014/15 winter, snow accumulation was closer to a long-term average, although some provinces report below average cumulative precipitation. Snow runoffs from the mountains normally provide over 80 percent of the irrigation water.

Late and well-distributed spring rains benefited crops but also contributed to favourable pasture conditions.

Improved seed availability, through private companies together with the provision of subsidized improved seeds to farmers by the Ministry of Agriculture, Irrigation and Livestock (MAIL), assisted crop productivity. Nevertheless, the bulk of the farmers still relied on their own farm-saved seeds. Households with low purchasing power in some areas are eligible for subsidies for improved seeds.

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Cereal import requirements (mainly wheat) in the current 2016/17 marketing year (July/June) are forecast at 2.3 million tonnes, about the same as in the previous year and slightly above the five-year average. Even in years with above-average domestic production, Afghanistan imports wheat flour, reflecting lack of adequate domestic milling capacity and problems of cost effectiveness. The dominant suppliers of wheat flour are Kazakhstan and Pakistan. Imported wheat and wheat flour are often blended with domestic wheat to improve its protein content.

Wheat prices up, but levels of inflation easing

Despite a series of well above-average harvests gathered since 2012, wheat and wheat flour prices in some provinces have been increasing since June 2012 compared to their pre-2012 levels. In the last six months to June 2016, wheat grain and wheat flour prices in Kabul and Kandahar remained stable but between 9 percent (in the case of wheat flour) to 30 percent (in the case of wheat grain) above their levels one year ago. Large regional price differences persist: wheat grain is over 35 percent more expensive in Kandahar than in Herat.

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According to the Integrated Food Security Phase Classification (IPC) from September 2015, six provinces are classified in Phase 2 “Stressed” and 12 in Phase 3 “Crisis”. Out of 12 provinces in Phase 3, three provinces Badhakshan, Kunduz and Paktika have 10 to 15 percent of the population in Phase 4 “Emergency”.

Afghanistan

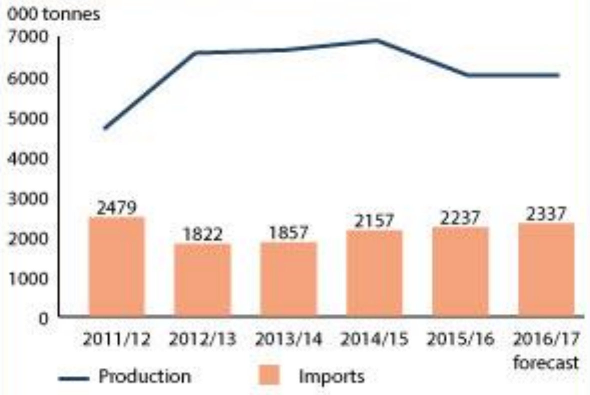
Cereal production

	2011-2015 average	2015	2016 forecast	change 2016/2015
	000 tonnes			percent
Wheat	4 730	4 673	4 600	-2
Rice (paddy)	711	612	702	15
Barley	402	403	400	-1
Others	324	335	320	-4
Total	6 167	6 023	6 022	0

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

Afghanistan

Total cereal production and imports



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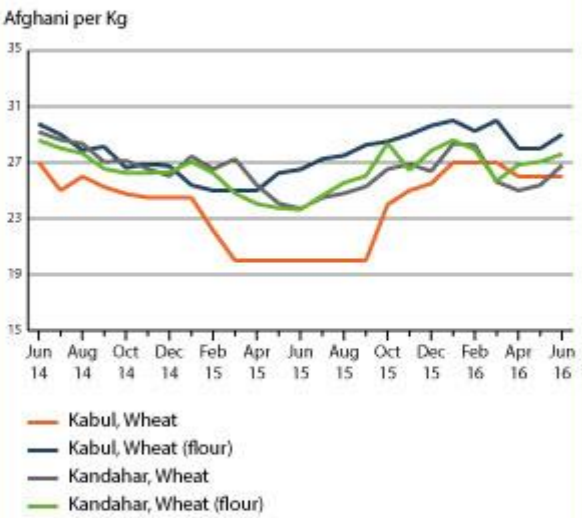
Afghanistan

Retail prices of wheat and wheat flour



Source: Vulnerability Analysis and Mapping (VAM) - WFP

GIEWS Country Brief

Afghanistan

Reference Date: 19-February-2016

FOOD SECURITY SNAPSHOT

- **Normal weather conditions prevail so far for 2016 winter grains crop**
- **Cereal import requirements in 2015/16 forecast at levels similar to 2014/15**
- **Inflation easing owing to lower energy costs**

Normal conditions prevail so far for 2016 winter grain crop

Planting of 2016 winter grains, mainly wheat, for harvest from May through June 2016, was mostly completed in November although in some parts of Nimroz, Hirat and Baghlan provinces it continued until December. Normal availability of seeds and inputs was reported. Planting of spring wheat normally starts in March. On average, about 2.2 million hectares are cultivated with wheat annually and about 90 percent of the wheat crop is planted in the autumn months. Unlike in the 2014/15 winter, snow accumulation so far has been closer to a long-term average. Snow runoffs from the mountains normally provide over 80 percent of the irrigation water. Given average precipitation, it is likely that the water availability for irrigation in the 2016 primary growing season will be normal.

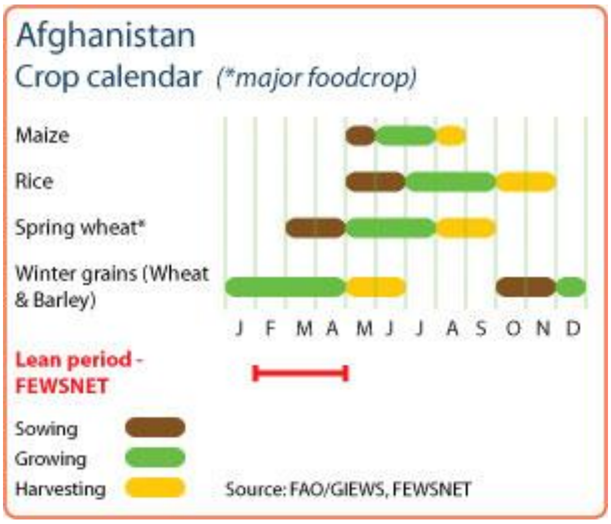
According to the Normalized Difference Vegetation Indices (NDVI), as of end of January 2016 cereal crops were in a poorer condition compared to the long-term average in Bamyan, Ghazni, Ghor, Nimroz, Samangam, Wardak and Zabul provinces. These provinces however are not the main wheat producing provinces of Afghanistan. Elsewhere the crop conditions were average or above average. Assuming normal weather conditions prevail for the remainder of the season, an average or above average crop is likely to be harvested.

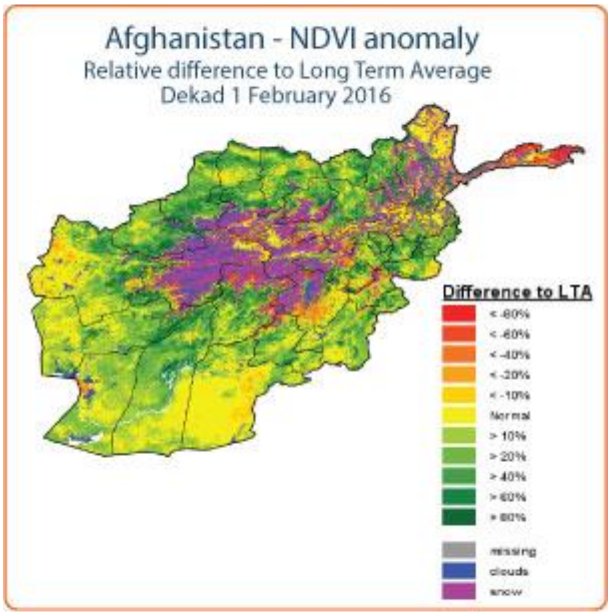
Average 2015 wheat crop collected

The 2015 crop season progressed under mixed weather conditions. Timely and sufficient rains in autumn 2014 facilitated plantings. However, up to mid-February, snow cover reported in northern and eastern Afghanistan remained limited, increasing danger of freeze-kill and threatening irrigation water availability. Precipitation later in the season mitigated the outcome. Consequently, the 2015 wheat crop stood at 4.7 million tonnes, some 13 percent less than a record crop of 5.37 million tonnes in 2014, and about the same as the five-year average.

Improved seed availability, through private companies together with the provision of subsidized improved seeds to farmers by MAIL, assisted crop productivity. Nevertheless, the bulk of the farmers still relied on their own farm-saved seeds. Households with low purchasing power in some areas are eligible for subsidies for improved seeds.

Elsewhere in the sector, the 2014 Opium Survey in Afghanistan revealed that in 2014 the total area under opium poppy cultivation (224 000 hectares) increased by 7 percent compared to the previous





Afghanistan

Cereal production

	2010-2014 average	2014	2015 estimate	change 2015/2014
	000 tonnes			percent
Wheat	4 702	5 370	4 673	-13
Rice (paddy)	723	802	612	-24
Barley	407	400	403	1
Others	317	320	335	5
Total	6 149	6 892	6 023	-13

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

year, whereas potential opium production was estimated at 6 400 tonnes, an increase of 17 percent from its 2013 level (5 500 tonnes) and the second highest level since 1994. The increase in opium production in 2014 led to a 23 percent decrease in the average farm-gate price of dry opium in 2014, yet opium remained the most lucrative crop in the country: the ratio of gross income per hectare of wheat to opium poppy was 1:4 and the ratio of net income was 1:6.

Wheat import requirements in 2015/16 similar to previous year

Cereal import requirements (mainly wheat) in the current 2015/16 marketing year (July/June) are forecast at 2.2 million tonnes, slightly more than in the previous year and about the same as the five-year average. Even in years with above-average domestic production, Afghanistan imports wheat flour, reflecting lack of adequate domestic milling capacity and problems of cost effectiveness. The dominant suppliers of wheat flour are Kazakhstan and Pakistan. Imported wheat and wheat flour are often blended with domestic wheat to improve its protein content.

Wheat prices up, but levels of inflation easing

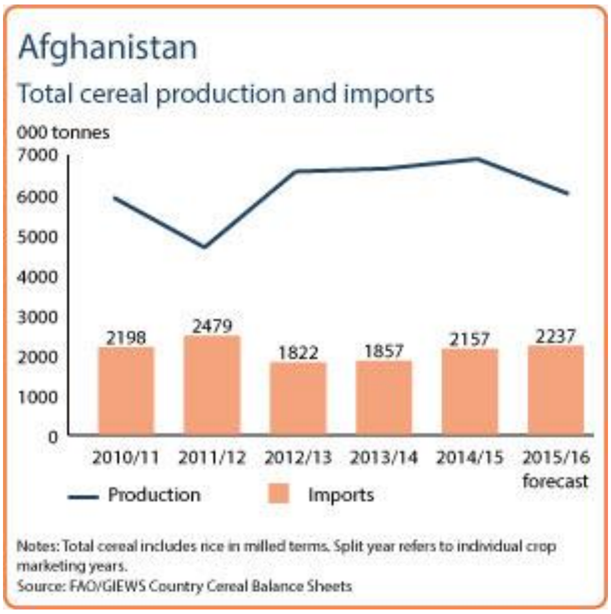
Despite a series of well above harvests gathered since 2012, wheat and wheat flour prices in some provinces have been increasing since June 2012 compared to their pre-2012 levels. In January 2016, wheat grain and wheat flour prices in Kabul and Kandahar continued increasing. In Kabul, wheat grain prices increased 12 percent compared to three months ago and 10 percent compared to one year ago while wheat flour was over 18 percent more expensive than one year ago. Large regional price differences persist: wheat grain is over 40 percent more expensive in Kandahar than in Herat.

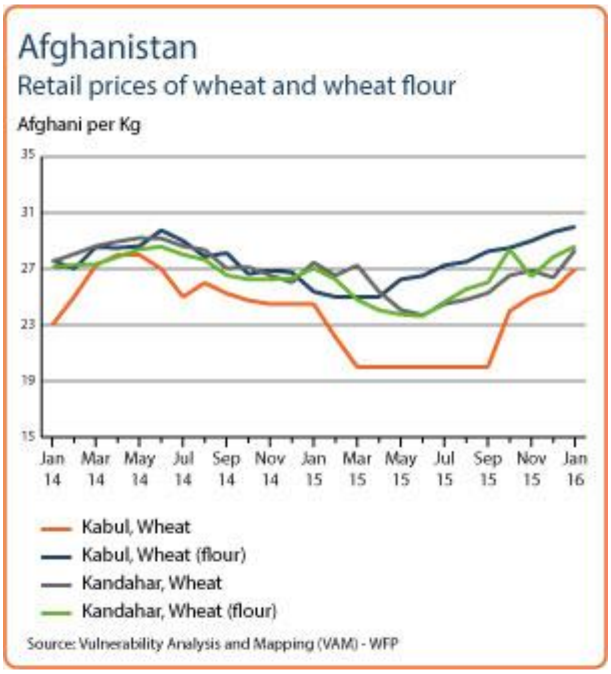
Inflation rates have declined due mainly to easing energy costs. In December 2015, the CPI in Kabul was close to 0 percent relative to the same period last year. The food component of the CPI decreased by 0.3 percent, while the non-food component decreased by 1.3 percent.

Stable food security situation overall, but concern remains in some areas for low-income and displaced people

The overall food security situation has generally been stable owing to the above-average harvest in the past years. However, fighting between the Government and insurgent forces resulted in further displacement.

According to the Integrated Food Security Phase Classification (IPC) valid from November 2015 to March 2016, six provinces are classified in Phase 2 "Stressed" and 12 in Phase 3 "Crisis". Out of 12 provinces in Phase 3, three provinces Badhakshan, Kunduz and Paktika have 10 to 15 percent of the population in Phase 4 "Emergency". January to March is the lean season with no agricultural activity when households rely on food stocks and market purchases with snow often blocking access to the markets.





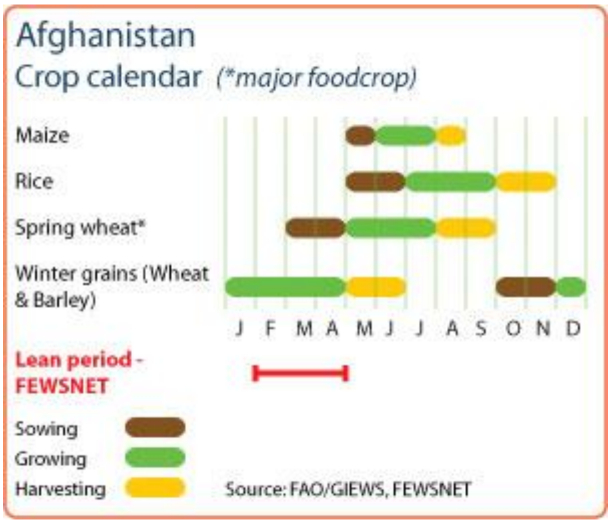
GIEWS Country Brief

Afghanistan

Reference Date: 03-July-2015

FOOD SECURITY SNAPSHOT

- **Wheat harvest in 2015 expected to be above previous two years**
- **Wheat import requirements in 2015/16 forecast at levels similar to 2014/15**
- **Inflation easing owing to lower energy costs**



2015 wheat crop forecast at slightly above the last two years

Harvesting of 2015 winter grains, mainly wheat, started in May and will continue until the end of July, followed by harvesting of maize and spring wheat from August. On average, about 2.5 million hectares are cultivated with wheat annually and about 90 percent of the wheat crop is planted in the autumn months. Nearly 80 percent of wheat cultivation is rainfed.

The 2015 crop season progressed under mixed weather conditions. Timely and sufficient rains in autumn 2014 facilitated plantings. However, up to mid-February, snow cover reported in northern and eastern Afghanistan remained limited, increasing danger of freeze-kill and threatening irrigation water availability. Snow runoffs from the mountains normally provide over 80 percent of the irrigation water and precipitation later in the season mitigated the outcome.

Afghanistan

Cereal production

	2010-2014 average	2014	2015 forecast	change 2015/2014
	000 tonnes			percent
Wheat	4 702	5 370	5 400	1
Rice (paddy)	716	770	711	-8
Barley	407	400	400	0
Others	317	320	317	-1
Total	6 142	6 860	6 828	0

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

Based on a joint pre-harvest assessment conducted by FEWSNet, Ministry of Agriculture, Irrigation and Livestock (MAIL), WFP and FAO, the preliminary forecast for the 2015 wheat crop is put at a level slightly above the last two years. Improved seed availability, through private companies together with the provision of subsidized improved seeds to farmers by MAIL, assisted crop productivity. Nevertheless, the bulk of the farmers still rely on their own farm-saved seeds. Households with low purchasing power in parts are eligible for subsidies for improved seeds.

Elsewhere in the sector, the 2014 Opium Survey in Afghanistan reveals that in 2014 the total area under opium poppy cultivation (224 000 hectares) increased by 7 percent compared to the previous year, whereas potential opium production was estimated at 6 400 tonnes, an increase of 17 percent from its 2013 level (5 500 tonnes) and the second highest level since 1994. The increase in opium production in 2014 led to a 23 percent decrease in the average farm-gate price of dry opium in 2014, yet opium remained the most lucrative crop in the country: the ratio of gross income per hectare of wheat to opium poppy was 1:4 and the ratio of net income was 1:6.

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

Wheat import requirements in 2015/16 similar to previous year

Cereal import requirements (mainly wheat) in the current 2015/16 marketing year (July/June) are forecast at 2.1 million tonnes, 1.2 million less than in the previous year and about 30 percent above the five-year average. Even in years with above-average domestic production, Afghanistan imports wheat flour, reflecting lack of adequate domestic milling capacity and problems of cost effectiveness. The dominant suppliers of wheat flour are Kazakhstan and Pakistan. Imported wheat and wheat flour are often blended with domestic wheat to improve its protein content.

Levels of inflation easing

Despite a bumper harvest in 2012, 2013 and 2014, wheat and wheat flour prices in some provinces have been increasing since June 2012 compared to their pre-2012 levels. In June 2015, wheat grain and wheat flour prices remained stable in most markets with the exception of Herat where wheat grain price decreased by 6.6 percent, while wheat flour price increased by 4.5 percent. Regional markets, particularly for wheat flour, continue to be well-supplied. Large regional price differences persist: wheat grain is over 30 percent more expensive in Kandahar than in Herat.

Inflation rates have declined due mainly to easing energy costs. In May 2015, the CPI in Kabul was down almost 3 percent relative to the same period last year. The food component of the CPI decreased by 2 percent, while the non-food component decreased by 4 percent. Bread and cereals recorded a decrease of 5.4 percent compared to last year, while the largest increases were recorded by fresh and dried fruits, dairy and eggs (over 4 percent).

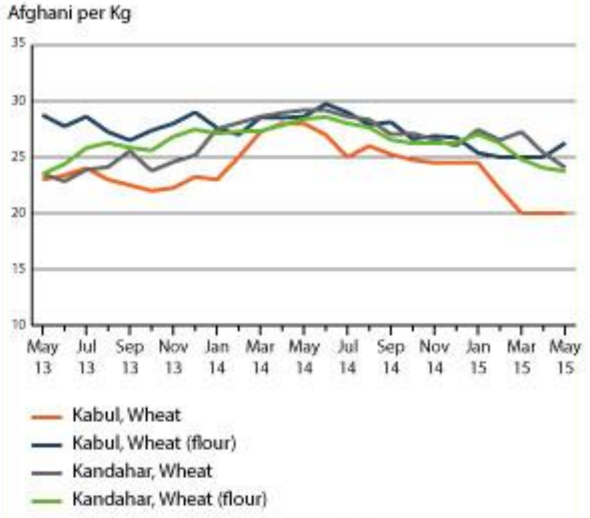
Stable food security situation overall, but concern remains in parts for low-income and displaced people

The overall food security situation has generally been stable owing to the above-average harvest in the last three years (2012-2014). However, fighting between the Government and insurgent forces resulted in further displacement. The latest available information from the United Nations High Commissioner for Refugees (UNHCR) indicates that the total number of IDPs in the country is 702 000, with Helmand Province being the most affected.

The WFP emergency food assistance which reached over 900 000 beneficiaries in 2013 was replaced by a Protracted Relief and Recovery Operation from 1 January 2014 to 31 December 2016. The operation is expected to reach 3.7 million beneficiaries.

Afghanistan

Retail prices of wheat and wheat flour



Source: Vulnerability Analysis and Mapping (VAM) - WFP

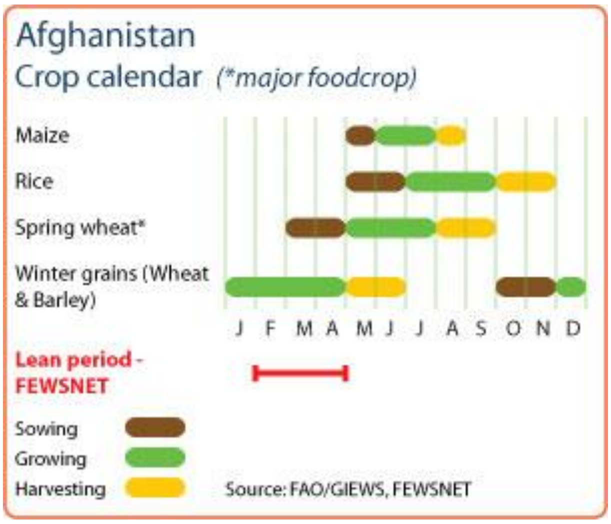
GIEWS Country Brief

Afghanistan

Reference Date: 03-July-2015

FOOD SECURITY SNAPSHOT

- **Wheat harvest in 2015 expected to be above previous two years**
- **Wheat import requirements in 2015/16 forecast at levels similar to 2014/15**
- **Inflation easing owing to lower energy costs**



2015 wheat crop forecast at slightly above the last two years

Harvesting of 2015 winter grains, mainly wheat, started in May and will continue until the end of July, followed by harvesting of maize and spring wheat from August. On average, about 2.5 million hectares are cultivated with wheat annually and about 90 percent of the wheat crop is planted in the autumn months. Nearly 80 percent of wheat cultivation is rainfed.

The 2015 crop season progressed under mixed weather conditions. Timely and sufficient rains in autumn 2014 facilitated plantings. However, up to mid-February, snow cover reported in northern and eastern Afghanistan remained limited, increasing danger of freeze-kill and threatening irrigation water availability. Snow runoffs from the mountains normally provide over 80 percent of the irrigation water and precipitation later in the season mitigated the outcome.

Based on a joint pre-harvest assessment conducted by FEWSNet, Ministry of Agriculture, Irrigation and Livestock (MAIL), WFP and FAO, the preliminary forecast for the 2015 wheat crop is put at a level slightly above the last two years. Improved seed availability, through private companies together with the provision of subsidized improved seeds to farmers by MAIL, assisted crop productivity. Nevertheless, the bulk of the farmers still rely on their own farm-saved seeds. Households with low purchasing power in parts are eligible for subsidies for improved seeds.

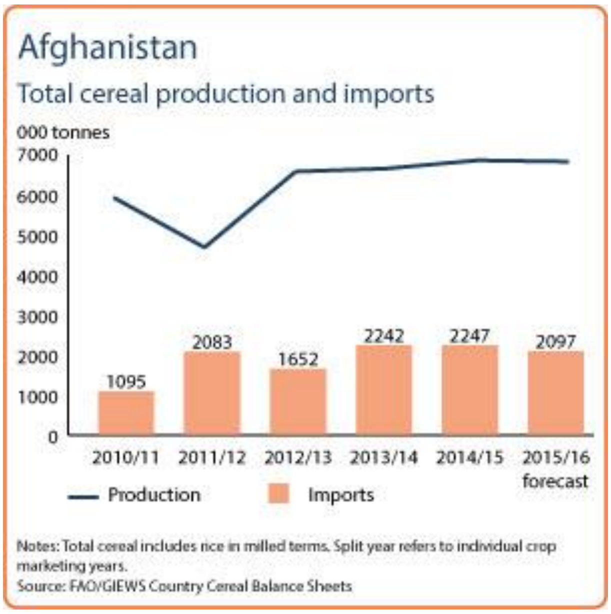
Afghanistan

Cereal production

	2010-2014 average	2014	2015 forecast	change 2015/2014
	000 tonnes			percent
Wheat	4 702	5 370	5 400	1
Rice (paddy)	716	770	711	-8
Barley	407	400	400	0
Others	317	320	317	-1
Total	6 142	6 860	6 828	0

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

Elsewhere in the sector, the 2014 Opium Survey in Afghanistan reveals that in 2014 the total area under opium poppy cultivation (224 000 hectares) increased by 7 percent compared to the previous year, whereas potential opium production was estimated at 6 400 tonnes, an increase of 17 percent from its 2013 level (5 500 tonnes) and the second highest level since 1994. The increase in opium production in 2014 led to a 23 percent decrease in the average farm-gate price of dry opium in 2014, yet opium remained the most lucrative crop in the country: the ratio of gross income per hectare of wheat to opium poppy was 1:4 and the ratio of net income was 1:6.



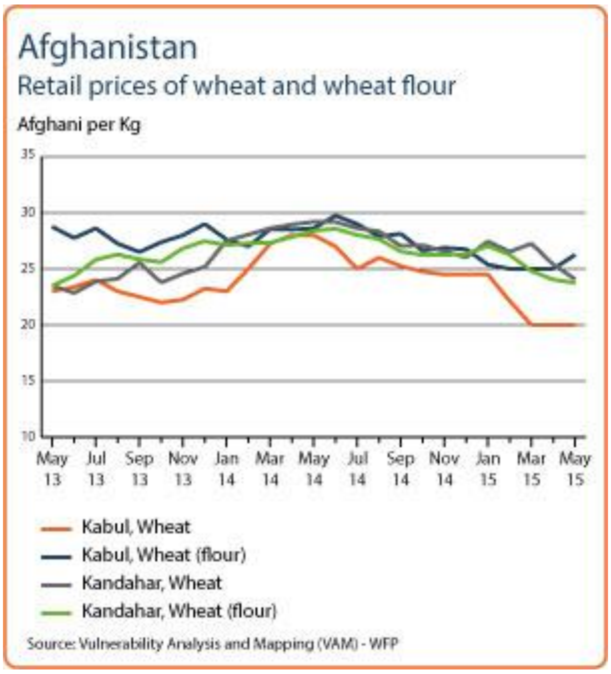
Wheat import requirements in 2015/16 similar to previous year

Cereal import requirements (mainly wheat) in the current 2015/16 marketing year (July/June) are forecast at 2.1 million tonnes, 1.2 million less than in the previous year and about 30 percent above the five-year average. Even in years with above-average domestic production, Afghanistan imports wheat flour, reflecting lack of adequate domestic milling capacity and problems of cost effectiveness. The dominant suppliers of wheat flour are Kazakhstan and Pakistan. Imported wheat and wheat flour are often blended with domestic wheat to improve its protein content.

Levels of inflation easing

Despite a bumper harvest in 2012, 2013 and 2014, wheat and wheat flour prices in some provinces have been increasing since June 2012 compared to their pre-2012 levels. In June 2015, wheat grain and wheat flour prices remained stable in most markets with the exception of Herat where wheat grain price decreased by 6.6 percent, while wheat flour price increased by 4.5 percent. Regional markets, particularly for wheat flour, continue to be well-supplied. Large regional price differences persist: wheat grain is over 30 percent more expensive in Kandahar than in Herat.

Inflation rates have declined due mainly to easing energy costs. In May 2015, the CPI in Kabul was down almost 3 percent relative to the same period last year. The food component of the CPI decreased by 2 percent, while the non-food component decreased by 4 percent. Bread and cereals recorded a decrease of 5.4 percent compared to last year, while the largest increases were recorded by fresh and dried fruits, dairy and eggs (over 4 percent).



Stable food security situation overall, but concern remains in parts for low-income and displaced people

The overall food security situation has generally been stable owing to the above-average harvest in the last three years (2012-2014). However, fighting between the Government and insurgent forces resulted in further displacement. The latest available information from the United Nations High Commissioner for Refugees (UNHCR) indicates that the total number of IDPs in the country is 702 000, with Helmand Province being the most affected.

The WFP emergency food assistance which reached over 900 000 beneficiaries in 2013 was replaced by a Protracted Relief and Recovery Operation from 1 January 2014 to 31 December 2016. The operation is expected to reach 3.7 million beneficiaries.

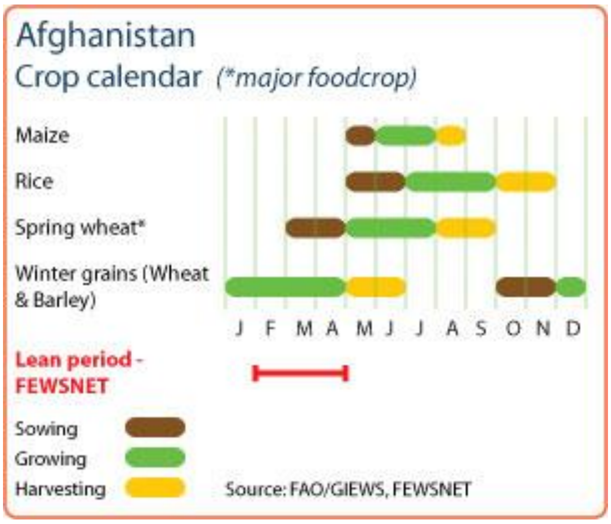
GIEWS Country Brief

Afghanistan

Reference Date: 10-November-2014

FOOD SECURITY SNAPSHOT

- Land preparation and winter wheat planting underway
- Above-average wheat crop harvested in 2014
- Wheat import requirements forecast at slightly above average levels in 2014/15
- Wheat prices increase, partly supported by currency depreciation
- Food security situation improves, but vulnerable groups in parts are still a concern



Harvesting of rice, planted in May/June 2014, is currently underway in the North Eastern provinces. Elsewhere in the country, land preparation and planting of winter grains are progressing. In September 2014, drier than usual weather prevailed but onset of rains in October 2014 in the northern part of the country has been replenishing the moisture deficit. On average, about 2.5 million hectares are cultivated with wheat annually and about 90 percent of the wheat crop is planted in the autumn months. Nearly 80 percent of wheat cultivation is rainfed.

Afghanistan

Cereal production

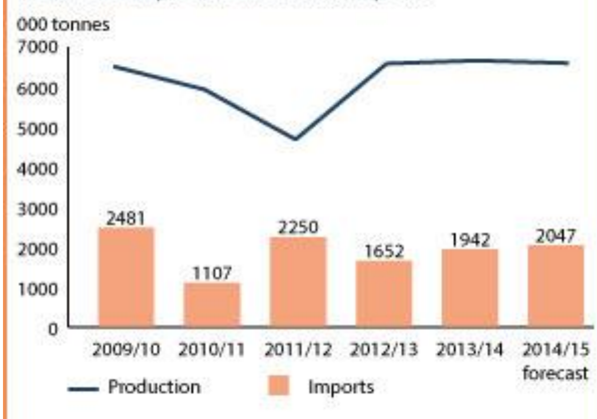
	2009-2013 average	2013	2014 forecast	change 2014/2013
	000 tonnes			percent
Wheat	4 641	5 170	5 100	-1
Rice (paddy)	691	764	770	1
Barley	423	400	400	0
Others	316	321	320	0
Total	6 072	6 655	6 590	-1

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

Above-average wheat harvest estimated in 2014

An above-average wheat crop, mainly harvested in May/June, of about 5.1 million tonnes is estimated in 2014, similar to 2013 which was one of the highest on record for the last 35 years. The above-average harvest in 2014 is attributed to favourable moisture conditions with better snow accumulation in winter.

In addition, improved seed availability, through private companies together with the provision of subsidized improved seeds to farmers by the Ministry of Agriculture, Irrigation and Livestock (MAIL), assisted crop productivity. Domestic seed industry production in 2013 increased by 33 percent compared to 2012. Nevertheless, the bulk of the farmers still rely on their own farm-saved seeds. Households with low purchasing power in northern Afghanistan are eligible for subsidies for improved seeds.



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

Wheat import requirements put at slightly above average levels in 2014/15

Cereal import requirements (mainly wheat) in the current 2014/15 marketing year (July/June) are forecast at 2 million tonnes, about 5 percent above the last year and the five-year average. Even in years with above-average domestic production, Afghanistan imports wheat flour, reflecting lack of adequate domestic milling capacity and problems of cost effectiveness. The dominant suppliers of wheat flour are Kazakhstan and Pakistan. Imported wheat and wheat flour are often blended with domestic wheat to improve its protein content.

High levels of inflation persist

Despite a bumper harvest in 2012, 2013 and 2014, wheat and wheat flour prices in some provinces have been increasing since June 2012 compared to their pre-2012 levels. In October 2014, wheat and flour prices in Kabul were at AFN 24.75/kg and AFN 26.62/kg, both slightly lower than in the previous month. Wheat prices in Kabul strengthened by 12 percent compared to a year earlier and wheat flour price decreased by about 3 percent. Continuous depreciation of the Afghanis over the last two years amplified the price increases in local currency of imported wheat flour.

Inflation rates have declined due mainly to easing energy costs. In October 2014, the CPI in Kabul was up 1.1 percent relative to the same period last year. The food component of the CPI increased by 4.7 percent, while the non-food component decreased by 1.4 percent. Compared to last year, bread and cereals recorded an increase of 4.5 percent, while the largest increase was recorded by fresh and dried fruits (over 15 percent).

Stable food security situation overall, but concern remains in parts for low-income and displaced people

The overall food security situation has generally been stable owing to the above-average harvest in the last three years (2012-2014). However, fighting between the Government and insurgent forces resulted in further displacement. The latest available information from the United Nations High Commissioner for Refugees (UNHCR) indicates that the total number of IDPs in the country is 702 000, with Helmand province being the most affected.

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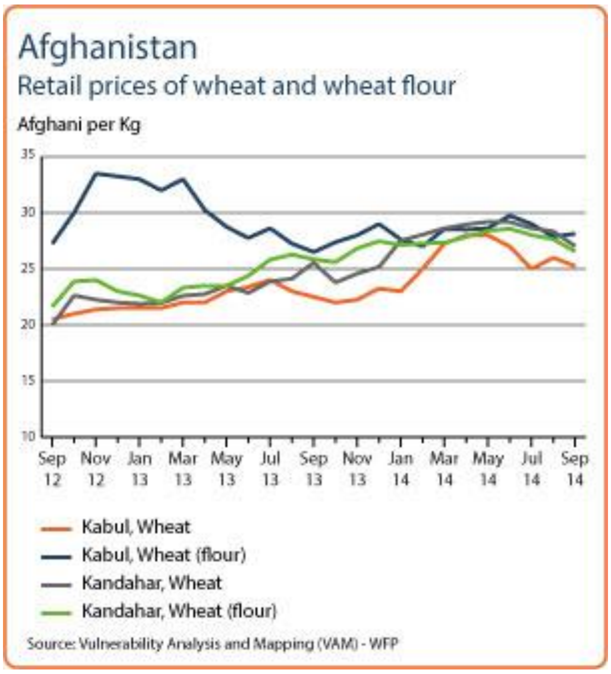


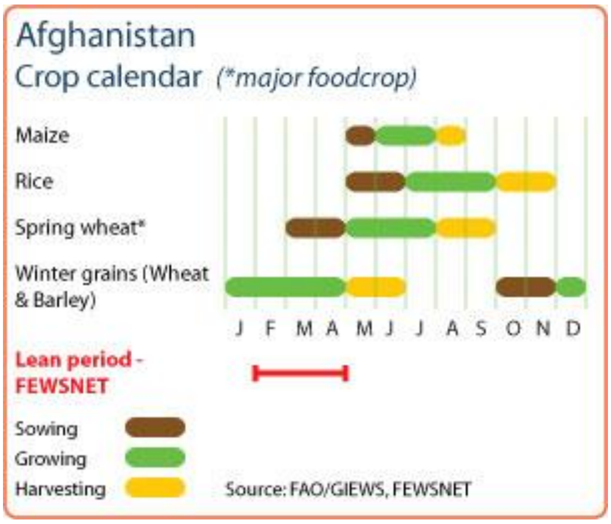
GIEWS Country Brief

Afghanistan

Reference Date: 17-October-2014

FOOD SECURITY SNAPSHOT

- Land preparation and winter wheat planting underway
- Above-average wheat crop harvested in 2014
- Wheat import requirements forecast at slightly above average levels in 2014/15
- Wheat prices increase, partly supported by currency depreciation
- Food security situation improves, but vulnerable groups in parts are still a concern



Harvesting of rice, planted in May/June 2014, is currently underway in the North Eastern provinces. Elsewhere in the country, land preparation and planting of winter grains are progressing. In September 2014, drier than usual weather prevailed but onset of rains in October 2014 in the northern part of the country has been replenishing the moisture deficit. On average, about 2.5 million hectares are cultivated with wheat annually and about 90 percent of the wheat crop is planted in the autumn months. Nearly 80 percent of wheat cultivation is rainfed.

Afghanistan
Cereal production

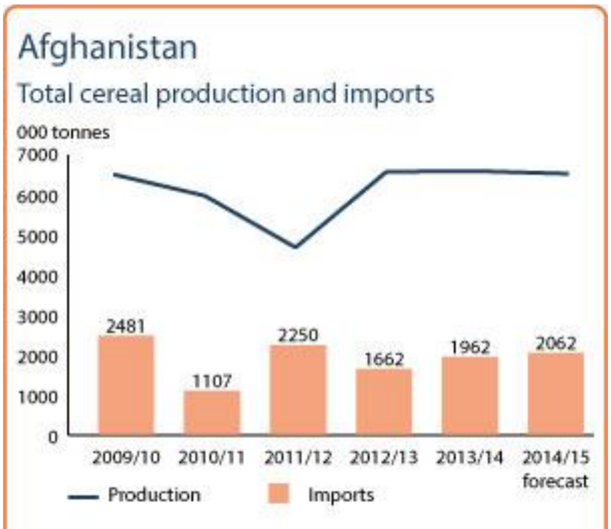
	2009-2013 average	2013	2014 forecast	change 2014/2013
	000 tonnes			percent
Wheat	4 641	5 170	5 100	-1
Rice (paddy)	687	700	706	1
Barley	423	400	400	0
Others	316	321	320	0
Total	6 068	6 591	6 526	-1

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

Above-average wheat harvest estimated in 2014

An above-average wheat crop, mainly harvested in May/June, of about 5.1 million tonnes is estimated in 2014, similar to 2013 which was one of the highest on record for the last 35 years. The above-average harvest in 2014 is attributed to favourable moisture conditions with better snow accumulation in winter.

In addition, improved seed availability, through private companies together with the provision of subsidized improved seeds to farmers by the Ministry of Agriculture, Irrigation and Livestock (MAIL), assisted crop productivity. Domestic seed industry production in 2013 increased by 33 percent compared to 2012. Nevertheless, the bulk of the farmers still rely on their own farm-saved seeds. Households with low purchasing power in northern Afghanistan are eligible for subsidies for improved seeds.



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

Wheat import requirements put at slightly above average levels in 2014/15

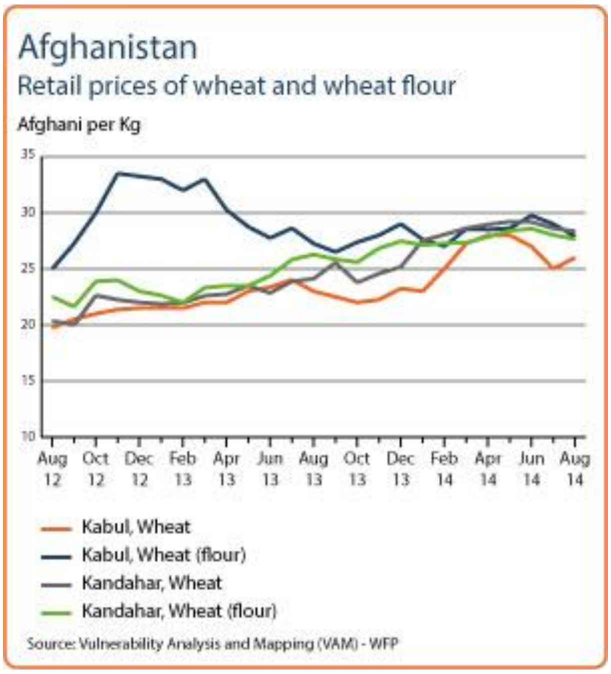
Cereal import requirements (mainly wheat) in the current 2014/15 marketing year (July/June) are forecast at 1.8 million tonnes, about 6 percent above the last year and the five-year average. Even in years with above-average domestic production, Afghanistan imports wheat flour, reflecting lack of adequate domestic milling capacity and problems of cost effectiveness. The dominant suppliers of wheat flour are Kazakhstan and Pakistan. Imported wheat and wheat flour are often blended with domestic wheat to improve its protein content.

High levels of inflation persist

Despite a bumper harvest in 2012, 2013 and 2014, wheat and wheat flour prices in some provinces have been increasing since June 2012 compared to their pre-2012 levels. In September 2014, wheat and flour prices in Kabul were at AFN 25.5/kg and AFN 28.5/kg, both about the same as in the previous month. Wheat prices in Kabul strengthened by 13 percent compared to a year earlier and wheat flour price by about 8 percent. Continuous depreciation of the Afghanis over the last two years amplified the price increases in local currency of imported wheat flour.

Inflation rates have declined due mainly to easing energy costs. In September 2014, the CPI in Kabul was up 1.2 percent relative to the same period last year. The food component of the CPI increased by 5.5 percent, while the non-food component decreased by 1.6 percent. Compared to last year, bread and cereals recorded an increase of 6.6 percent, while the largest increase was recorded by milk and vegetables (over 9 percent).

Recent reports indicate that political uncertainty led to reduced trade flows with Pakistan, leading to increased domestic supply of fruit and vegetables benefiting consumers but driving down farmers' income. Inflation rate for fruit in Kabul declined from over 13 percent in July 2014 to 7 percent in September 2014 on yearly basis, while that of vegetables declined from 16 to 9 percent over the same period.



Stable food security situation overall, but concern remains in parts for low-income and displaced people

The overall food security situation has generally been stable owing to the above-average harvest in the last three years (2012-2014). However, fighting between the Government and insurgent forces resulted in further displacement. The latest available information from the United Nations High Commissioner for Refugees (UNHCR) indicates that the total number of IDPs in the country is 702 000, with Helmand province being the most affected.

The WFP emergency food assistance which reached over 900 000 beneficiaries in 2013 was replaced by a Protracted Relief and Recovery Operation from 1 January 2014 to 31 December 2016. The operation is expected to reach 3.7 million beneficiaries.

GIEWS Country Brief

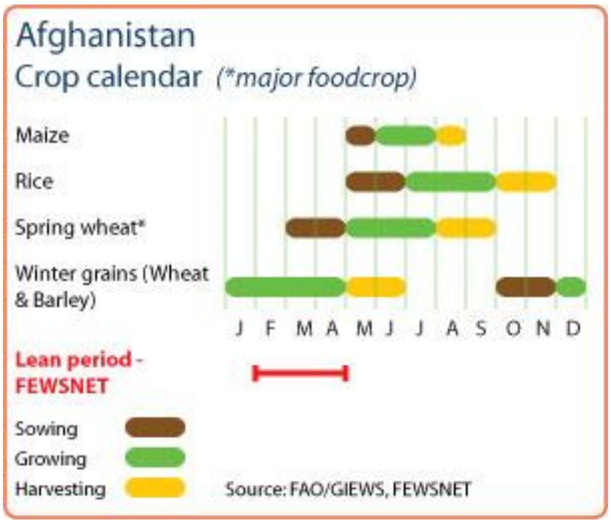
Afghanistan

Reference Date: 03-June-2014

FOOD SECURITY SNAPSHOT

- Above-average wheat harvest forecast in 2014
- Wheat import requirements forecast at below-average levels in 2013/14
- Inflation rates ease
- Food security situation improves, but vulnerable groups in parts are still a concern

Harvesting of the winter wheat, planted in November/December 2013, is currently underway in the southern and eastern provinces. Elsewhere in the country harvest will start in August/September. On average, Afghanistan harvests wheat from about 2.5 million hectares and about 90 percent of the wheat crop is planted in the autumn and about 80 percent of the crop is rainfed. Remotely-sensed information indicates a satisfactory growing season.



Above-average wheat harvest forecast in 2014

An above-average wheat harvest of 5.1 million tonnes is forecast to be collected in 2014, about the same as the 2013 harvest which was one of the highest on record for the last 35 years. The above-average harvest in 2014 is attributed to favourable weather and moisture conditions with better snow accumulation in winter.

Improved seed availability, through private companies together with the provision of subsidized improved seeds to farmers by the Ministry of Agriculture, Irrigation and Livestock (MAIL), assisted crop productivity. Domestic seed industry production in 2013 increased by 33 percent compared to 2012. Nevertheless, the majority of farmers still rely on their own farm-saved seeds. Households with low purchasing power in northern Afghanistan are eligible for subsidies for improved seeds.

The Government aims to establish strategic grain reserves to be used in emergencies and stabilize prices. In addition to purchases from the farmers, the Government of India has donated wheat to the reserves.

Elsewhere, the Afghanistan Opium Risk Assessment 2013 found that the poppy cultivated area in 2013 has increased across Afghanistan for the third year in a row, following high opium prices coupled with insecurity. Opium cultivation increased in 12 of the country's 34 provinces.

Wheat import requirements put at below-average levels in 2013/14

Cereal import requirements (mainly wheat) in the current 2013/14 marketing year (July/June) are forecast at 1.4 million tonnes, about the same as last year, but 30 percent less than the five-year average. Even in years with above-average domestic production, Afghanistan imports wheat flour, reflecting lack of adequate domestic milling capacity and problems of cost-effectiveness. The dominant suppliers of wheat flour are Kazakhstan and Pakistan. Imported wheat and wheat flour are often blended with domestic wheat to improve its protein content.

Afghanistan

Cereal production

	2009-2013 average	2013	2014 forecast	change 2014/2013
	000 tonnes			percent
Wheat	4 641	5 170	5 100	-1
Rice (paddy)	687	700	706	1
Barley	423	400	400	0
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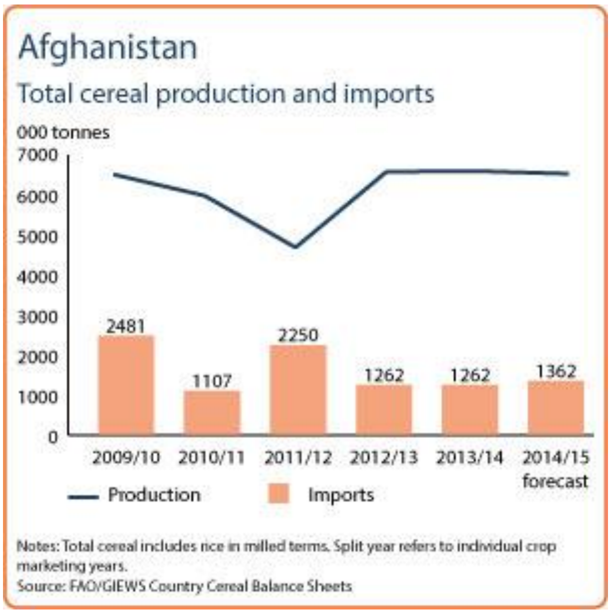
Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets



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

High levels of inflation persist

Despite a bumper harvest in 2012, 2013 and 2014, wheat and wheat flour prices in some provinces have been increasing since June 2012 compared to their pre-2012 levels. In April 2014 wheat and flour prices in Kabul were at AFN 28/kg and AFN 29/kg, both about 3 percent higher than the previous month. Although wheat prices in Kabul strengthened by 27 percent compared to a year earlier, wheat flour price decreased by about 4 percent due to well-supplied regional wheat flour markets in Kazakhstan and Pakistan. Continuous depreciation of the Afghanis over the last two years amplified the price increases in local currency.

Inflation rates have declined due mainly to easing energy costs. In May 2014, the CPI in Kabul was up 0.7 percent relative to the same period last year. The food component of the CPI increased by 7.1 percent, while the non-food component decreased by 3.8 percent. Compared to last year, bread and cereals recorded an increase of 7 percent, while the largest increase was recorded by vegetables (over 21 percent).

Stable food security situation overall, but concern remains in parts for low-income people

The overall food security situation has generally been stable owing to the above-average harvest in 2012-2014. However, food security concerns remain in some areas, particularly in the west-central highlands where a below-average rainfed harvest was collected. Poor households rely on external humanitarian assistance. The WFP emergency food assistance which reached over 900 000 beneficiaries in 2013 was replaced by Protracted Relief and Recovery Operation from 1 January 2014 to 31 December 2016. The operation is expected to reach 3.7 million beneficiaries.

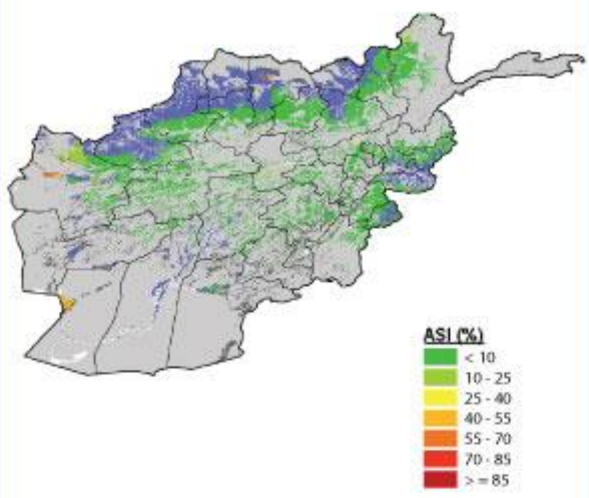
Afghanistan

Retail prices of wheat and wheat flour

Source: WFP Afghanistan

Afghanistan - Agricultural Stress Index (ASI)[1]

from start of season 1 to dekad 3 May 2014



[1]ASI measures the percent of cropland affected by drought per GAUL 2 region. he index calculation is based on METOP-AVHRR data.

GIEWS Country Brief

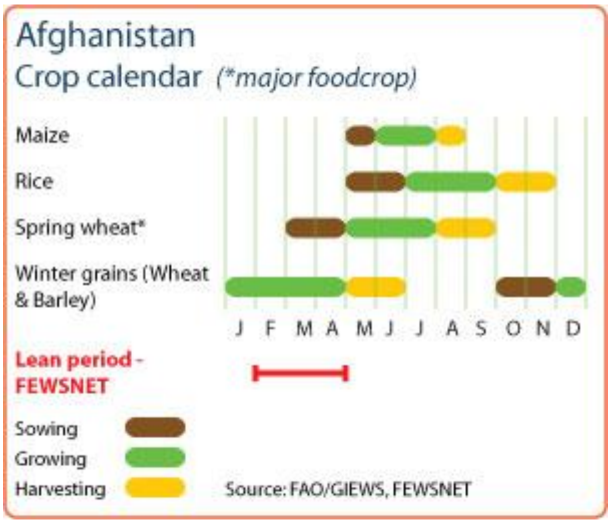
Afghanistan

Reference Date: 28-January-2014

FOOD SECURITY SNAPSHOT

- Above average wheat harvest in 2013
- Wheat import requirements forecast at below average levels in 2013/14
- High levels of inflation remain
- Food security situation improves but vulnerable groups in parts still a concern

Planting of the winter wheat, for harvesting from May 2014, was concluded in November/December 2013. A prolonged period of below-average temperatures and low precipitation is registered so far although the impact on crops remains unclear. On average, Afghanistan harvests wheat from about 2.5 million hectares. About 90 percent of the wheat crop is planted in the autumn and about 80 percent of the crop is rain-fed.



Above average wheat harvest gathered in 2013

An above average wheat harvest of 4.9 million tonnes was collected in 2013, slightly below the 2012 harvest which was the second highest on record for the last 35 years. However, large differences exist between provinces. Smaller wheat harvests were gathered in Faryab, Ghor Jawzjan and Khost due to dry spells and untimely rains combined with wheat rust in some areas.

Improved seed availability through private companies together with the provision of subsidised improved seeds to farmers by the Ministry of Agriculture, Irrigation, and Livestock (MAIL) assisted crop productivity. Households with low purchasing power in northern Afghanistan are eligible for subsidies for improved seeds.

Elsewhere, the Afghanistan Opium Risk Assessment 2013 found that the poppy cultivated area in 2013 has increased across Afghanistan for the third year in a row following high opium prices coupled with insecurity. Opium cultivation increased in 12 of the country’s 34 provinces.

Afghanistan

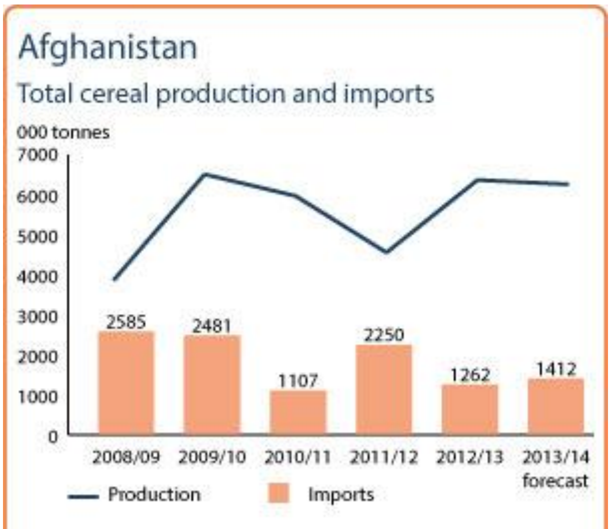
Cereal production

	2008-2012 average	2012	2013 estimate	change 2013/2012
	000 tonnes			percent
Wheat	4 094	5 008	4 900	-2
Rice (paddy)	669	700	700	0
Barley	376	336	336	0
Others	311	322	321	0
Total	5 451	6 366	6 257	-2

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

Wheat import requirements put at below average levels in 2013/14

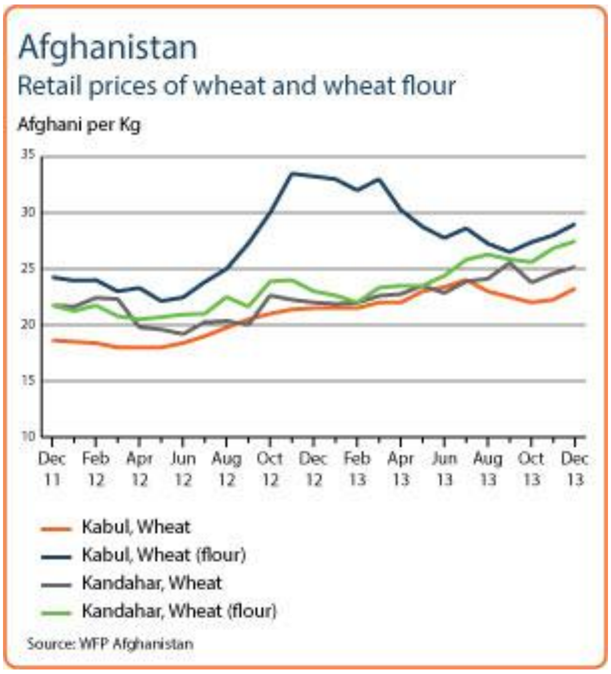
Cereal import requirements (mainly wheat) in the current marketing year 2013/14 (July/June) are forecast at 1.4 million tonnes, about 12 percent higher than last year but 30 percent less than the five-year average. Even in years with above average domestic production, Afghanistan imports wheat flour, reflecting lack of adequate domestic milling capacity and problems of cost-effectiveness. The dominant suppliers of wheat flour are Kazakhstan and Pakistan. Imported wheat and wheat flour are often blended with domestic wheat to improve its protein content.



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

High levels of inflation persist

Despite a bumper harvest in 2012 and again in 2013, wheat and wheat flour prices in some provinces have been increasing since June 2012 compared to their pre-2012 levels. Flour prices recorded higher increases reflecting limited availability of domestic flour. In December 2013 wheat and flour prices in Kabul, at 23.25 AFN/kg and 29 AFN/kg, were both about 4 percent higher than the previous month. Although wheat prices in Kabul strengthened by 8 percent compared to a year earlier, wheat flour price decreased by about 13 percent. Continuous depreciation of the Afghani over the last two years amplified the price increases in local currency.



Inflation rates have remained elevated due mainly to high energy costs. In December 2013, the CPI in Kabul was up 6.6 percent relative to the same period last year. The food component of the CPI increased by 9.7 percent while the non-food component rose by 4.6 percent. Compared to last year, bread and cereals recorded one of the largest increases of 10.4 percent among all food and beverages items, exceeded only by vegetables (almost 30 percent).

Stable food security situation overall but concern remains in parts for low income people

The overall food security situation has generally been stable owing to the above average harvest. However, food security concerns remain in some areas, particularly in the west-central highlands where below average rain-fed harvest was collected. Poor households rely on external humanitarian assistance. The WFP emergency food assistance was expected to reach over 900 000 beneficiaries in 2013.

GIEWS Country Brief

Afghanistan

Reference Date: 14-August-2013

FOOD SECURITY SNAPSHOT

- Above average wheat harvest collected in 2013
- Wheat import requirements forecast at below average levels in 2013/14
- High levels of inflation remain
- Food security situation improves but vulnerable groups in parts still a concern

Above average wheat harvest collected in 2013

The winter wheat harvest is completed in most parts of the country with the exception of higher elevation areas. About 90 percent of the wheat crop is planted in the autumn and about 80 percent of the crop is rain-fed. The final production estimates are not yet available, but preliminary forecasts put the 2013 wheat production at 4.9 million tonnes, slightly below the 2012 harvest which was the second highest on record for the last 35 years. However, large differences exist among provinces. Smaller wheat harvests were gathered in Faryab, Ghor Jawzjan and Khost due to dry spells and untimely rains combined with wheat rust in some areas.

Improved seed availability through private companies together with the provision of subsidised improved seeds to farmers by the Ministry of Agriculture, Irrigation, and Livestock (MAIL) assisted crop productivity. Reports indicate that MAIL has recently established strategic grain reserves to be used mainly in emergencies. Details of the scheme are not yet available.

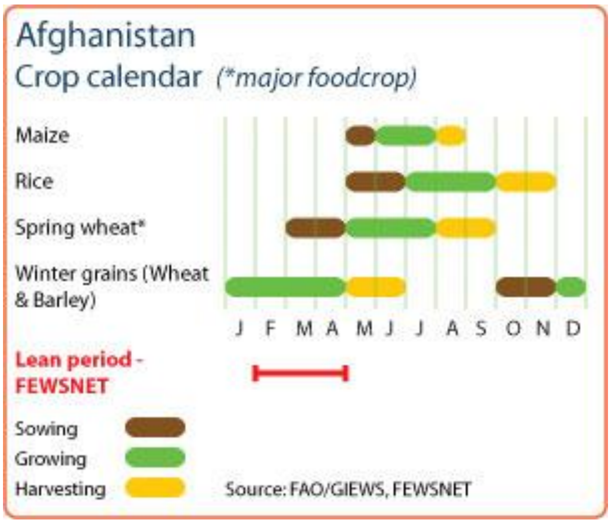
Elsewhere, the Afghanistan Opium Risk Assessment 2013 found that the poppy cultivated area in 2013 has increased across Afghanistan for the third year in a row following high opium prices coupled with insecurity. Opium cultivation increased in 12 of the country's 34 provinces.

Wheat import requirements put at below average levels in 2013/14

Cereal import requirements (mainly wheat) in the current marketing year 2013/14 (July/June) are forecast at 1.4 million tonnes, about 12 percent higher than last year but 30 percent less than the five-year average. Even in years with above average domestic production, Afghanistan imports wheat flour, reflecting lack of adequate domestic milling capacity and problems of cost-effectiveness. The dominant suppliers of wheat flour are Kazakhstan and Pakistan. Imported wheat and wheat flour are often blended with domestic wheat to improve its protein content.

High levels of inflation persist

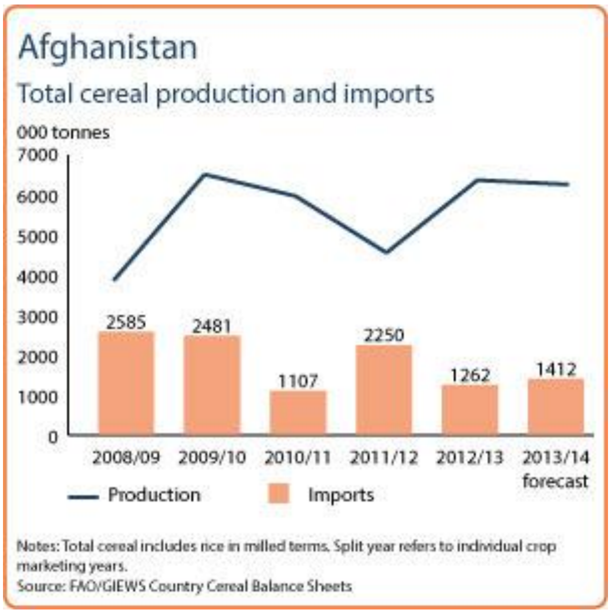
Despite a bumper harvest in 2012 and again in 2013, wheat and wheat flour prices in some provinces have been increasing since June 2012. Flour prices recorded higher increases reflecting limited availability of domestic flour. In July 2013 wheat and flour prices in Kabul were both 3 percent higher than the previous month, but over 20 percent higher than a year earlier. Continuous depreciation of the



Afghanistan
Cereal production

	2008-2012 average	2012	2013 estimate	change 2013/2012
	000 tonnes			percent
Wheat	4 094	5 008	4 900	-2
Rice (paddy)	669	700	700	0
Barley	376	336	336	0
Others	311	322	321	0
Total	5 451	6 366	6 257	-2

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



Afghani over the last two years amplified the price increases in local currency.

Inflation rates have remained elevated due mainly to high energy costs. In March 2013 (last month for which data were available) the CPI in Kabul was up 5.8 percent relative to the same period last year. The food component of the CPI increased by 2.6 percent while the non-food component rose by 8 percent. Compared to last year, bread and cereals recorded one of the largest increases of 11.8 percent among all food and beverages items, exceeded only by spices (14.2 percent).

Stable food security situation overall but concern remains in parts for low income people

The overall food security situation has generally been stable owing to the above average harvest. However, food security concerns remain in some areas, particularly in the west-central highlands where below average rain-fed harvest is expected. Vulnerable households will have sold most of the marketable livestock by September. External humanitarian assistance will be needed. The WFP extended its protracted relief and recovery operation to tackle food security challenges to December 2013. Emergency food assistance is expected to reach over 900 000 beneficiaries in 2013.

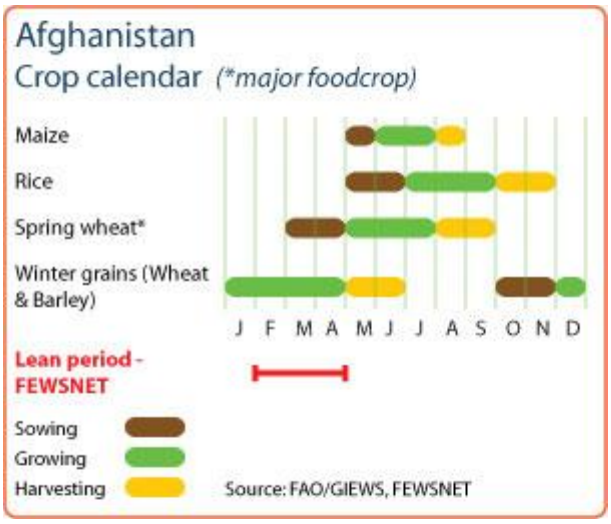
GIEWS Country Brief

Afghanistan

Reference Date: 30-November-2012

FOOD SECURITY SNAPSHOT

- Bumper wheat harvest gathered in 2012
- High wheat prices together with high levels of inflation remain
- Food security situation improves but vulnerable groups in parts still a concern



The winter cropping season has begun under generally favourable weather conditions.

Recent precipitation in some areas is expected to assist land preparation. About 90 percent of the wheat crop is planted in autumn, and about 80 percent of the crop is rain-fed. During sowing, levels of temperature in western parts of the country remained mostly above average, while lingered at below average levels in the east. Eastern and Southeastern regions received beneficial rainfall in September although less than in 2011. Kunduz province in the east has particularly been affected by early season dryness. However, seasonal forecasts indicate increased precipitation in the coming weeks and are expected to lower the moisture deficit.

Improved seed availability through private companies together with the provision of subsidised improved seeds to farmers by the Ministry of Agriculture, Irrigation, and Livestock (MAIL) is also expected to assist crop productivity.

Afghanistan

Cereal production

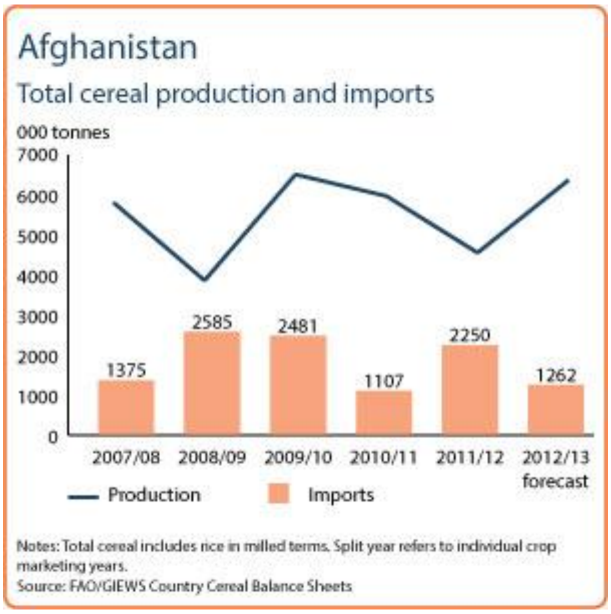
	2007-2011 average	2011	2012 estimate	change 2012/2011
	000 tonnes			percent
Wheat	3,990	3,256	5,008	54
Rice (paddy)	656	672	700	4
Barley	383	305	336	10
Others	310	320	322	1
Total	5,339	4,553	6,366	40

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

Wheat harvest well above average in 2012

The 2012 wheat production reached 5 million tonnes, second highest on record for the last 35 years after the 2009 harvest of 5.1 million tonnes, according to the Ministry. At this level, the crop is about 54 percent higher than last year's drought affected crop and about 25 percent above the previous five years average thanks to timely rains coupled with larger planted area. Accordingly, cereal imports (mainly wheat) in the current marketing year 2012/13 are forecast at 1 262 million tonnes, about 44 percent lower than last year and 36 percent less than the five-year average.

Elsewhere, the annual opium survey of Afghanistan found that the poppy cultivated area in 2012 increased by 18 percent following high opium prices. However, the total amount of production decreased by 36 percent compared to 2011 due to crop disease and harsh weather. Various projects to replace opium cultivation with other alternatives (e.g., saffron, cotton) are under way. Poppy free provinces were rewarded with agricultural machinery by the government.



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

High levels of inflation persist together with rising wheat prices since June 2012

Despite a bumper harvest in 2012, wheat and wheat flour prices have been increasing since June 2012. Flour prices recorded higher increases reflecting limited milling capacity in the country. In October 2012 wheat and flour prices in Kabul were 14 and 20 percent higher than a year ago, but slightly lower or similar to the last five year average. Continuous depreciation of the Afghani over the last two years amplified the price increases in local currency. Households' food stocks built in preparation for the winter have also contributed to a seasonally induced demand. The above-average domestic wheat harvest in 2012 is expected to have partly buffered the prevailing price increases in global and regional markets. For instance, Kazakhstan, a traditional supplier to Afghanistan, supplies wheat exports at a price level that is 40 percent higher than last year.

Inflation rates have remained elevated due mainly to high energy costs. In October 2012 the national CPI was up 5.3 percent relative to the same period last year. The food component of the CPI increased by 2.1 percent while the non-food component rose by 9.4 percent. Compared to last year, bread and cereals increased by 4.8 percent, while the largest increases were recorded for non-alcoholic beverages (16.7 percent), spices (13.2 percent), and meats (10.9 percent).

Stable food security situation overall but concern remains in parts for low income people

The overall food security situation has generally been stable owing to the 2012 bumper harvest. However, food security concerns remain in some areas, particularly in the extreme northeast and some higher elevation areas in the central highlands that were affected by extreme cold temperatures in early 2012 leading to loss of livestock. With winter season approaching, WFP had intensified the provision of food supplies to communities that will be cut off in the winter months in the north-eastern province of Badakhshan. High unemployment rates coupled with high rates of inflation present real food security challenges, mainly to low income households.

In addition, the decline in remittances from Iran following the rapid depreciation of the Iranian Rial has increased the food security stress on households relying on them.

GIEWS Country Brief

Afghanistan

Reference Date: 17-July-2012

FOOD SECURITY SNAPSHOT

- Favourable outlook for the ongoing wheat harvest
- Wheat prices on a downward trend since July 2011 but high levels of inflation remain
- Food security situation improves but vulnerable groups in some areas still a concern

Cereal harvest expected to increase in 2012 following timely and beneficial rains

Harvesting of the winter crops (mainly wheat and barley) is currently under way following some delay due to unusual low temperatures in some elevated areas. Timely rains coupled with larger planted area boosted overall production prospects, especially in rainfed areas affected by drought last year.

Accordingly, wheat production is forecast at around 3.8 million tonnes, about 17 percent higher than last year's drought affected crop but still 5 percent below the previous five years average.

The current delay in harvest is expected to have some impact in planting activities of second season crops (such as maize).

The recent good rains have also augmented water availability and prospects for irrigated crops (such as rice).

Wheat prices generally stable since July 2011; however, inflation rates remain high

Prices of wheat – the country's main staple – have generally been stable since July 2011 due to steady local supplies and stable regional and international prices.

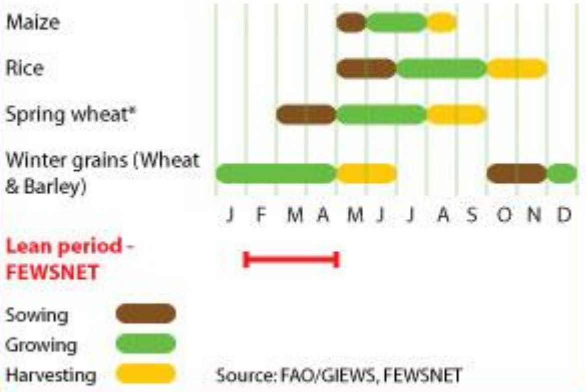
Inflation rates have, however, remained elevated due mainly to high energy costs. Recent reports indicate that the annual inflation rate in 2011 remained at over 11 percent although projections for 2012 are lower, in the range of about 5 percent. In April 2012 the national CPI was up 8 per cent relative to the same period last year. The food component of the CPI increased by 7.4 percent while the non-food component rose by 9 percent. Compared to last year, bread and cereals increased by 1.9 percent, while the largest increases were recorded for spices (28.9 percent), fresh and dried fruits (20.1 percent), and non-alcoholic beverages (19.5 percent).

Stable food security situation overall but concern remains for low income population in some areas

The overall food security situation has generally been stable but some areas, particularly in the extreme northeast, some higher elevations of the central highlands and are faced with increased food insecurity due to below-normal temperatures and above-normal precipitation resulting in poor agricultural conditions. In addition, areas affected by spring floods (such as the northern districts of Balkh and Jawzan provinces), even following some assistance from the Government and

Afghanistan

Crop calendar (*major foodcrop)



Source: FAO/GIEWS, FEWSNET

Afghanistan

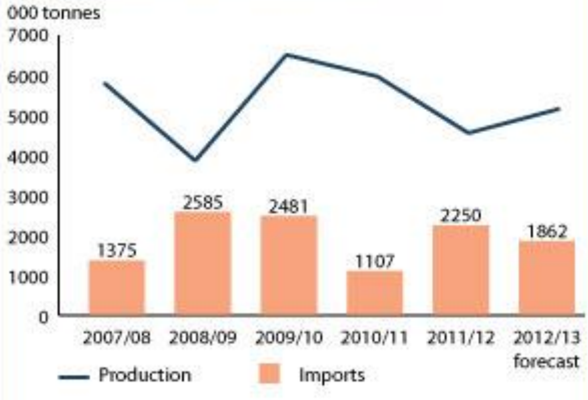
Cereal production

	2007-2011 average	2011	2012 forecast	change 2012/2011
	000 tonnes			percent
Wheat	3 990	3 256	3 800	17
Rice (paddy)	656	672	700	4
Barley	383	305	336	10
Others	310	320	322	1
Total	5 339	4 553	5 158	13

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

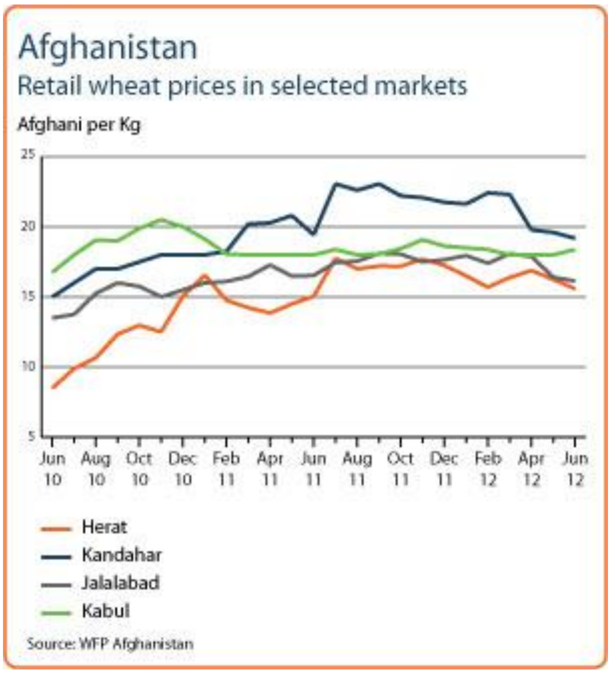
Afghanistan

Total cereal production and imports



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

humanitarian agencies are expected to remain weak and vulnerable. High unemployment rates coupled with high rates of inflation present real food security challenges, mainly to low income households.



GIEWS Country Brief

Afghanistan

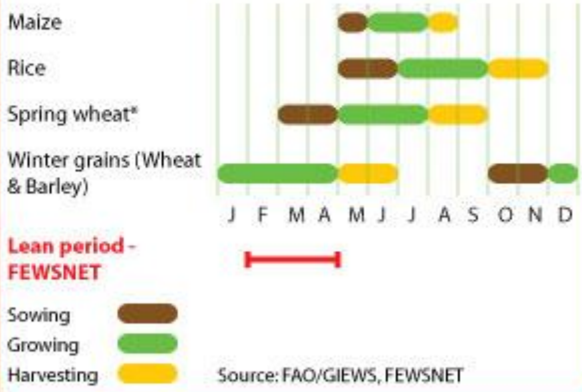
Reference Date: 19-January-2012

FOOD SECURITY SNAPSHOT

- Mixed performance of rains during the beginning of the 2011/12 winter cropping season
- Below average cereal harvest in 2011
- Wheat prices remain stable since July but the overall inflation is over 10 percent
- Food security in general satisfactory but remains as a concern in certain pockets and for the low income population

Afghanistan

Crop calendar *(*major foodcrop)*



Mixed performance of rains during the beginning of the 2011/12 winter cropping season

Planting of the 2011/12 winter cereal crops, mainly wheat and barley, is complete. Favourable early seasonal rains in October and November have had beneficial impact on planting and crop emergence. Although dry weather prevailed during December, light to moderate precipitation was received in early January.

Below average cereal harvest in 2011

The Ministry of Agriculture, Irrigation and Livestock (MAIL) has estimated the 2011 wheat production at 3.26 million tonnes, 28 percent lower than the level of 2010 and 36 percent lower than the record production in 2009. The drop in harvest was predominantly attributed to the precipitation deficiency during the early months of the agricultural season and warmer than usual temperatures during the later part. Particularly affected by the dry weather were northern, north-eastern and western areas of the country where rain-fed wheat cultivation is common. Overall cereal production estimated at 4.55 million tonnes, is 24 percent below 2010 level and around 15 percent below the average of previous five years.

Due to dry weather conditions in 2011, about 90 percent of the wheat production came from the 54 percent of area under irrigation, as opposed to some 68 percent of the production from the 46 percent of area under irrigation in 2010.

Horticulture is an important subsector in Afghanistan. During 2011 the area planted with fruits and vegetables was estimated to have increased to 119 000 hectares and 128 000 hectares, respectively and consequently the overall production of the horticulture crops at the national level was expected to rise. No final estimates are yet available.

Given the reduced harvest of 2011, the import requirement of wheat for 2011/12 marketing year (July/June) are expected to rise significantly. To maintain the apparent per capita cereal utilization, the total cereal imports, mainly wheat and rice, in 2011/12 are forecast at 2.23 million tonnes.

Afghanistan

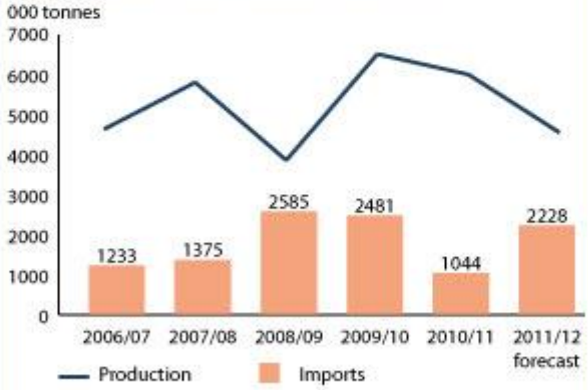
Cereal production

	2006-2010 average	2010	2011 estimate	change 2011/2010
	000 tonnes			percent
Wheat	4 013	4 532	3 256	-28
Rice (paddy)	630	718	672	-6
Barley	398	437	305	-30
Others	323	316	320	1
Total	5 364	6 003	4 553	-24

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

Afghanistan

Total cereal production and imports



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

Wheat prices remain stable since July but the overall inflation is over 10 percent

Prices of wheat, the country's main staple, have been relatively stable since July 2011, due to the good supply of wheat flour from the neighbouring countries (Pakistan and Kazakhstan) and the decrease of international wheat prices. The latest available official data indicate that nationally the overall consumer price inflation in November 2011 (the year-on-year increase), is estimated at 10.4 percent. However, the bread and cereal prices rose by about 5 percent during 2011.

Food security satisfactory in general but remains as a concern in certain pockets and for the low income population

The overall food security situation has been relatively satisfactory. However, reduced domestic wheat harvest, inflation and generally high unemployment rates, are a cause for concern for the food security, especially for the low income households.

Food security conditions of vulnerable population affected by the poor wheat harvest in northern, western and central Afghanistan are expected to improve with the launch of the Government and donor assistance.

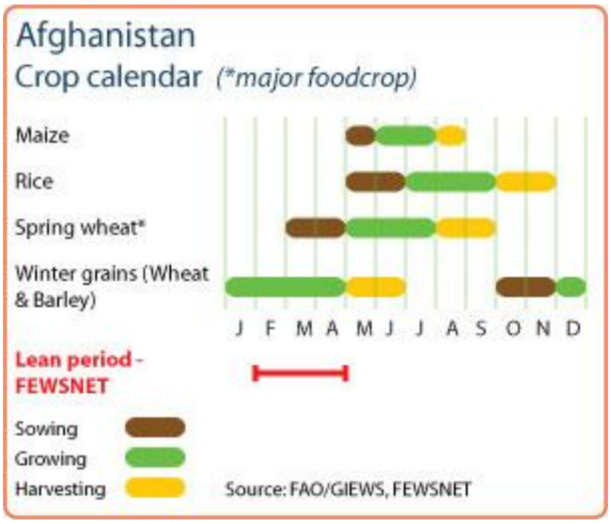
GIEWS Country Brief

Afghanistan

Reference Date: 12-August-2011

FOOD SECURITY SNAPSHOT

- The 2011 wheat harvest is officially estimated at 3.26 million tonnes, much lower than the previous two years
- Wheat prices have been steadily rising since mid 2010 in most markets
- Food security in general satisfactory but it remains as a concern in certain in the drought-affected areas in the north, northeast and west



The 2011 wheat harvest is estimated at 3.26 million tonnes, about 28 percent lower than the previous year

The Ministry of Agriculture, Irrigation and Livestock (MAIL) has estimated 2011 wheat harvest at 3.26 million tonnes, 28 percent lower than the level of 2010 and 36 percent lower than the record production in 2009. The drop in harvest is predominantly attributed to the precipitation deficiency during the early months of the agricultural season and warmer than usual temperatures during the later part. Particularly affected by the dry weather are northern, north-eastern and western areas of the country where rain-fed wheat cultivation is common. However, flash floods also occurred near Herat in the west during the season. Overall cereal production estimated at 4.55 million tonnes, is 23 percent below 2010 level and around 15 percent below the average of previous five years.

In 2011 about 90 percent of the wheat production came from the 54 percent of area under irrigation, as opposed to some 68 percent of the production from the 46 percent of area under irrigation in 2010. Overall production of fruits and vegetables at the national level is expected to rise for a second year in a row. A significant increase in the area with fruit trees was reported.

Given the reduced harvest of the current season, the import requirement of wheat for 2011/12 marketing year (July/June) are expected to rise significantly. To maintain the apparent per capita cereal utilization, the total cereal imports, mainly wheat and rice, in 2011/12 are estimated at 1.68 million tonnes. By the end of June 2011, Government had imported 1.025 million tonnes of cereals (71 percent of which was wheat) and received 102 000 tonnes of food aid.

Wheat prices have been steadily rising since mid-2010

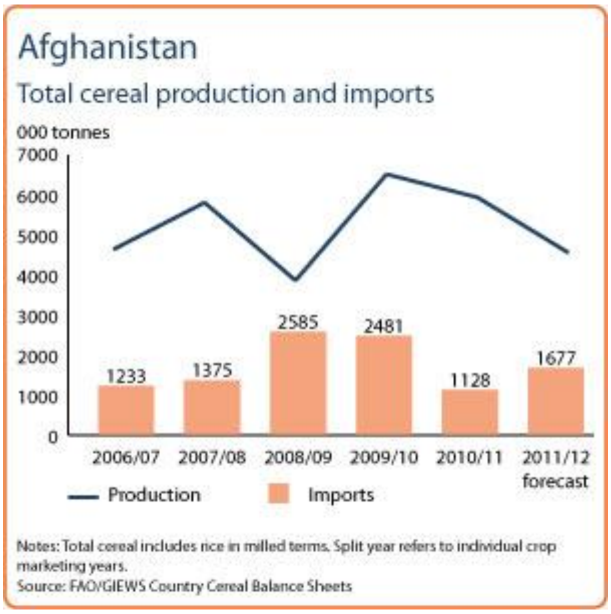
Prices of wheat, the country's main staple, have been rising since June-2010, partly due to the reduced harvest and partly the rise in the international prices. In July 2011 prices of wheat and wheat flour were up to 79 percent over their levels a year before. They are likely to stay high given the current poor harvest. The July 2011 price of all cereals together increased by 60 percent above pre-food price crises (Jan-Oct 2007). The latest available official data indicate that nationally the overall consumer price inflation in April 2011, a year-on-year increase, is estimated at 22 percent. Bread and cereals price inflation is estimated even higher with annual inflation rate of 26.7

Afghanistan

Cereal production

	2006-2010 average	2010	2011 forecast	change 2011/2010
	000 tonnes			percent
Wheat	4 013	4 532	3 256	-28
Rice (paddy)	616	650	672	3
Barley	398	437	305	-30
Others	14	15	19	27
Total	5 351	5 935	4 553	-23

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



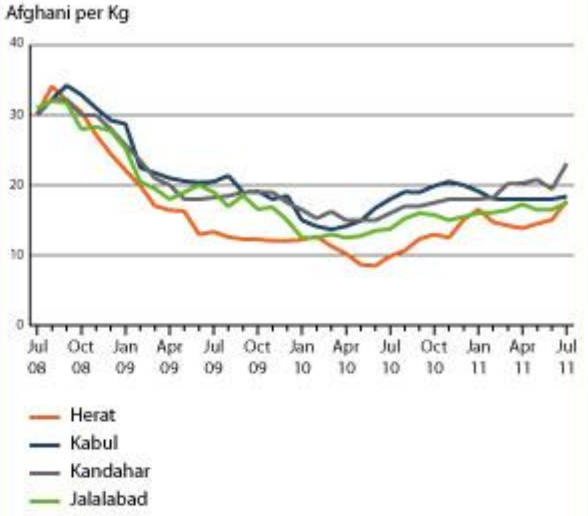
percent.

Food security satisfactory in general but remains as a concern in certain pockets and for the low income population

The overall food security situation has been relatively satisfactory. However, reduced domestic wheat harvest, galloping inflation and generally high unemployment rates, are a cause for concern for the food security, especially for the low income population. Reportedly assessments are underway in the drought-affected areas in the north, northeast and west. Responding to concerns about food security and wheat prices the Government plans to set up a grain reserve of up to 500 000 tonnes of wheat.

Afghanistan

Retail wheat prices in selected markets



Source: WFP Afghanistan

GIEWS Country Brief

Afghanistan

Reference Date: 23-May-2011

FOOD SECURITY SNAPSHOT

- The 2011 winter wheat output is expected to be lower than the previous two years
- Bread and cereals prices inflation reached 26.7 percent in April 2011 following low prices the same period year ago
- Food security in general satisfactory but it remains as a concern in certain pockets and for the low income population

The 2011 winter wheat output is expected to be lower than the previous two harvests

The Afghanistan Wheat Policy Committee has indicated that 2011 wheat harvest is expected to be reduced from the year before mainly due to the reduction in the area planted to the crop, especially in the rainfed areas, precipitation deficiency during the early months and warmer temperatures during later part of the agricultural season. FAO preliminarily forecasts the 2011 wheat harvest at 4 million tonnes, some 12 percent below 2010 level and 21 percent below the record production in 2009. Heavy rain/snow fall during January and early February was received in the central and north-eastern areas of the country which to some extent compensated for the below normal precipitation since October 2010. Reportedly flash floods occurred near Herat in the west. Spring wheat was planted in March-April.

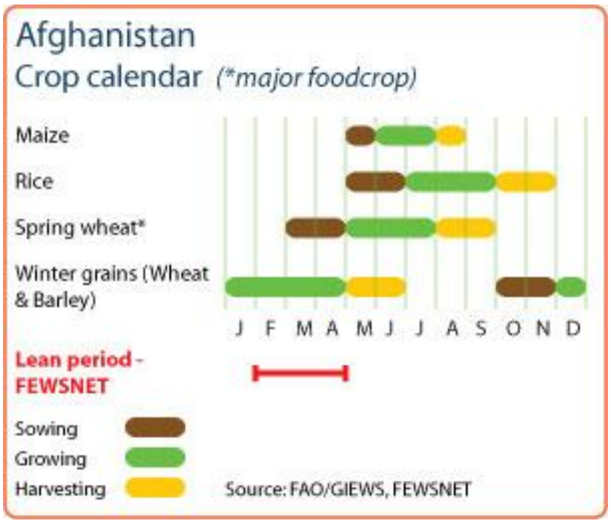
In 2010, the winter wheat production was officially estimated at 4.53 million tonnes, about 11 percent below the previous year's record crop but some 15 percent above average. The reasonably good harvest was due to the generally satisfactory rainfall distribution, especially in the beginning and the ending part of the season, increased use of improved seeds and fertilizers and timely control of pests and diseases. However, some damage due to excessive rains in northeast region towards the end of the season was experienced. About 68 percent of the production comes from the 46 percent of area under irrigation. A significant increase in the area planted with fruit trees in 2010 was also reported.

Total cereal output for 2010, is estimated at 5.9 million tonnes (including rice in paddy terms) some 9 percent below the bumper crop of 2009. Consequently imports of wheat and rice for 2010/11 marketing year (July/June) are expected to decline.

Wheat prices have been steadily rising since March-May 2010 in most markets

Prices of wheat, the country's main staple, have been rising since May-June 2010, partly due to the seasonal increase and partly rise in the international prices. Nationally the overall consumer price inflation in April 2011, a year-on-year increase from April 2010, is estimated at 22 percent. Bread and cereals prices rose even higher with annual inflation rate of 26.7 percent.

Food security satisfactory in general but remains as a concern in certain pockets and for the low

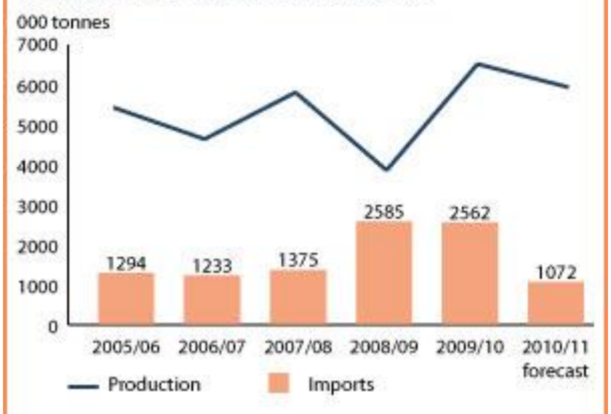


Afghanistan

Cereal production

	2005-2009 average	2009	2010 estimate	change 2010/2009
	000 tonnes			percent
Wheat	3 960	5 064	4 532	-11
Rice (paddy)	584	645	650	1
Barley	378	486	437	-10
Others	15	19	15	-21
Total	5 249	6 514	5 935	-9

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



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

income population

The overall food security situation has been relatively satisfactory. However, reduced domestic wheat harvest, galloping inflation and generally high unemployment rates, are a cause for concern for the food security, especially for the low income population. Typically pockets of food insecurity exist in the country particularly in central and southeast parts of the country.

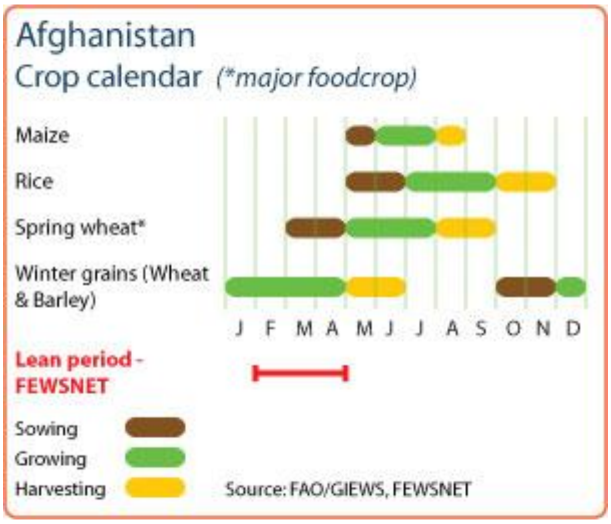
GIEWS Country Brief

Afghanistan

Reference Date: 11-February-2011

FOOD SECURITY SNAPSHOT

- Early prospects for 2011 wheat crop improved.
- Wheat prices have been rising but bread prices have remained more stable in recent months.
- Food security in general has improved but it remains as a concern in certain pockets.



Prospects for 2011 winter wheat crop improved with precipitation in January and early February

Heavy rain/snow fall during January and early February was received in the central and north-eastern areas of the country. This should compensate for the below normal precipitation since October 2010, the start of the country's main wet season. Reportedly flash floods occurred near Herat in the west. Temperatures remained below normal in January and they are forecast to fall below the frost kill level (below -18oC) next week in the northeast mountains and central highlands but snow cover is estimated to be adequate. Spring wheat will be planted in March-April. Hence the final outcome of wheat production will depend on the weather conditions in the next weeks and performance of rains during spring months.

Afghanistan

Cereal production

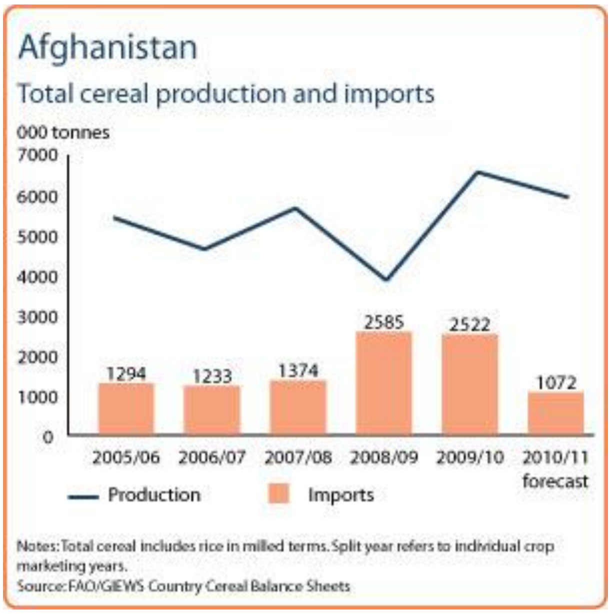
	2005-2009 average	2009	2010 estimate	change 2010/2009
	000 tonnes			percent
Wheat	3942	5115	4532	-11
Rice (paddy)	584	645	650	1
Barley	378	486	437	-10
Others	328	319	316	-1
Total	5232	6565	5935	-10

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

Above average 2010 wheat harvest but below previous year's record level

In 2010, the winter wheat production was officially estimated at 4.53 million tonnes, about 11 percent below the previous year's record crop but some 15 percent above average. The reasonably good harvest was due to the generally satisfactory rainfall distribution, especially in the beginning and the ending part of the season, increased use of improved seeds and fertilizers and timely control of pests and diseases. However, some damage due to excessive rains in northeast region towards the end of the season was experienced. About 68 percent of the production comes from the 46 percent of area under irrigation. A significant increase in the area planted with fruit trees in 2010 was also reported.

Total cereal output for 2010, is estimated at 5.9 million tonnes (including rice in paddy terms) some 10 percent below the bumper crop of 2009. Consequently imports of wheat and rice for 2010/11 marketing year (July/June) are expected to decline.

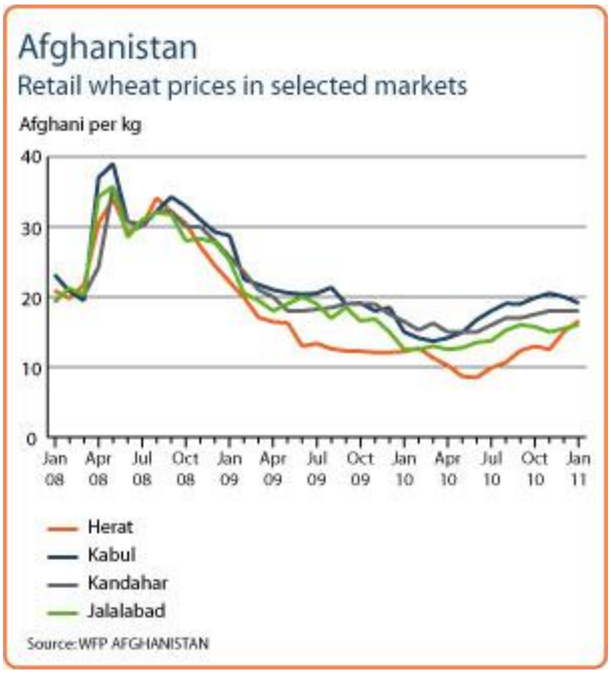


Wheat prices have been rising and bread prices have remained more stable in recent months

Prices of wheat, the country's main staple, have been rising since May-June, partly due to the seasonal increase and partly rise in the international prices. Wheat retail prices in January 2011 were up by 14, 18, 20 and 95 percent from June 2010 prices in Kabul, Jalalabad, Kandahar and Herat markets, respectively. Herat is in the west bordering Iran, prices there seem to have soared due to constrained transport across the border.

Pockets of food insecurity remain

On the whole, following two successive bumper wheat harvests, large carry-over stocks, reduced wheat imports requirements in 2010/11 (July/June) and satisfactory export availabilities in Kazakhstan and Pakistan, the national wheat supply situation in Afghanistan is expected to remain satisfactory in marketing year 2010/11 (July/June). However, given the continuing low purchasing power of the population due to long standing conflicts, erosion of incomes and assets, pockets of food insecurity exist in the country, especially in central and southeast parts of the country.



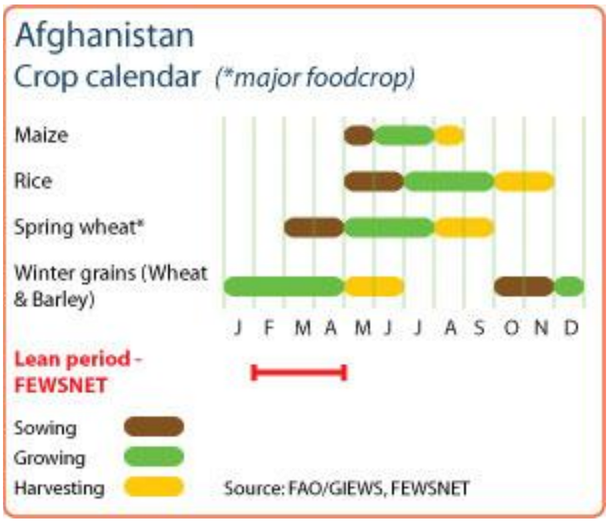
GIEWS Country Brief

Afghanistan

Reference Date: 9-November-2010

FOOD SECURITY SNAPSHOT

- 2010 wheat harvest estimated at an above average level but lower than last year's record level
- Wheat prices have been rising since May-June 2010 following a long and steady decline since August 2008.
- Pockets of food insecurity remain despite two consecutive good cereal harvests and declining wheat prices.



Above average 2010 wheat harvest but below last year's record level

In 2010, the winter wheat, harvested in May-June and the spring wheat in September, is officially estimated at 4.53 million tonnes, about 11 percent below last year's record crop but some 15 percent above average. According to the Ministry of Agriculture, Irrigation and Livestock (MAIL), this year's reasonably good harvest was due to the generally satisfactory rainfall distribution, especially in the beginning and the ending part of the season, increased use of improved seeds and fertilizers and timely control of pests and diseases. However, recently some damage due to excessive rains in northeast region was reported. About 68 percent of the production comes from the 46 percent of area under irrigation. A significant increase in the area planted with fruit trees has been reported. The overall conditions of cereal and horticultural crops, as well as animal health and animal production are satisfactory.

Total cereal output for 2010, is estimated at 5.9 million tonnes (including rice in paddy terms) some 10 percent below the bumper crop of 2009. Consequently imports of wheat and rice for 2010/11 marketing year (July/June) are expected to decline. However, in spite of favourable harvests, cereal imports during 2009/10 were over 2.5 million tonnes, including 700 000 tonnes of wheat. Some of the imports may be possibly for stock building purposes.

Afghanistan

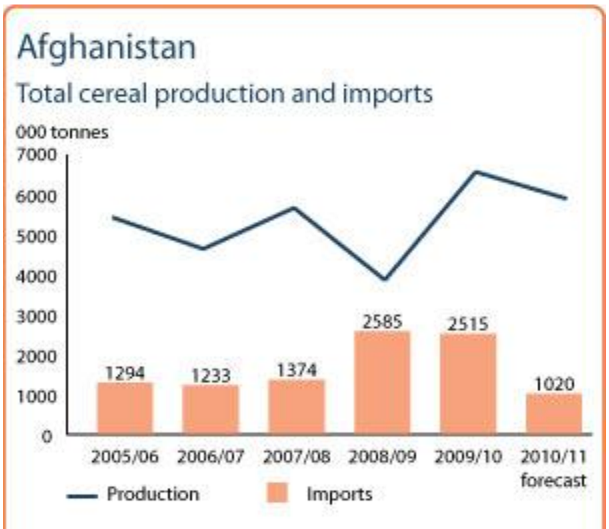
Cereal production

	2005-2009 average	2009	2010 forecast	change 2010/2009
	000 tonnes			percent
Wheat	3942	5115	4532	-11
Rice (paddy)	584	645	610	-5
Barley	378	486	437	-10
Others	328	319	316	-1
Total	5232	6565	5895	-10

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

Wheat prices have been rising since May-June 2010 after having declined from June 2008

Prices of wheat, the country's main staple, have been rising since May-June following the less than satisfactory harvest. Wheat flour prices in October 2010 were 22 to 43 percent above their levels in June. This is the result of higher export prices in Kazakhstan, the main supplier of wheat flour to Afghanistan, and in the neighbouring Pakistan, as well as increased fuel prices. Despite two consecutive bumper wheat harvests in 2010 and 2009, the country depends on imports of wheat flour due to low domestic milling capacity.

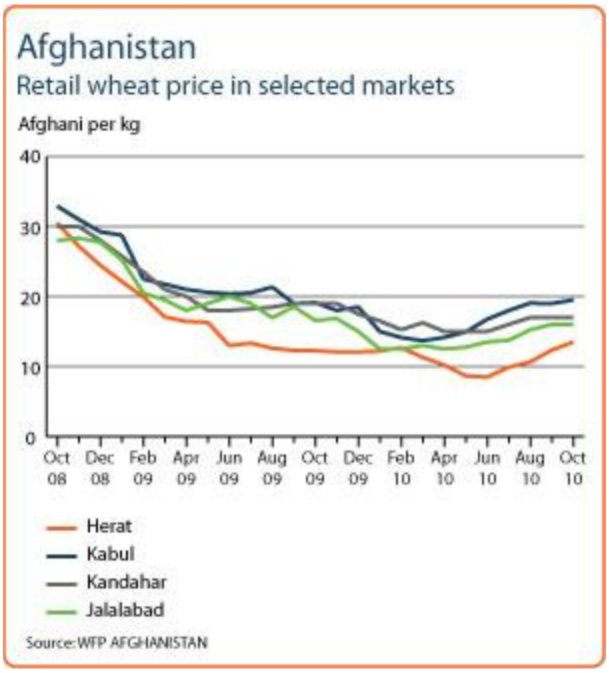


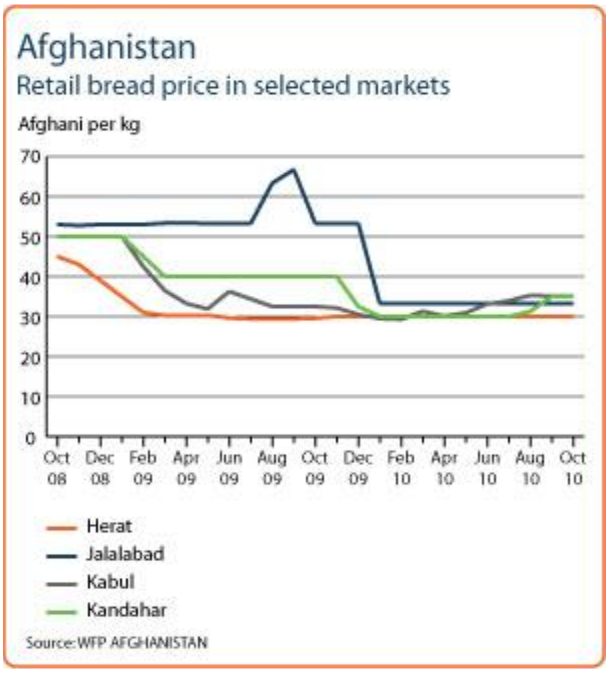
Notes: Total cereal includes rice in milled terms. Split year refers to individual crop marketing years.
Source: FAO/GIEWS Country Cereal Balance Sheets

Pockets of food insecurity remain despite

On the whole, following two successive bumper wheat harvests, large carry-over stocks, reduced wheat imports requirements in 2010/11 (July/June) and satisfactory export availabilities in Kazakhstan and Pakistan, the national wheat supply situation in Afghanistan is expected to remain satisfactory in marketing year 2010/11

(July/June). However, given the continuing low purchasing power of the population due to long standing conflicts, erosion of incomes and assets, pockets of food insecurity exist in the country, especially in central and southeast parts of the country.





GIEWS Country Brief

Afghanistan

Reference Date: 08-September-2010

FOOD SECURITY SNAPSHOT

- 2010 wheat harvest estimated above average but lower than last year's record level
- Wheat prices have risen in recent months after a long and steady decline since August 2008
- Pockets of food insecurity remain despite two consecutive good cereal harvests and declining wheat prices

Current wheat harvest below last year's record level

Winter wheat harvest was completed in May-June and the spring wheat is currently being gathered. The Ministry of Agriculture, Irrigation and Livestock (MAIL) has forecast 2010 wheat production at 4.53 million tonnes, about 11 percent below last year's record crop but some 15 percent above average. About 68 percent of the production comes from the 46 percent of area under irrigation. According to the MAIL Report this reasonably good harvest was due to the generally satisfactory rainfall distribution, especially in the beginning and the later part of the season, increased use of improved seeds and fertilizers and timely control of pests and diseases. A significant increase in the area planted with fruit trees has been reported. The overall conditions of cereal and horticultural crops, as well as animal health and animal production are satisfactory.

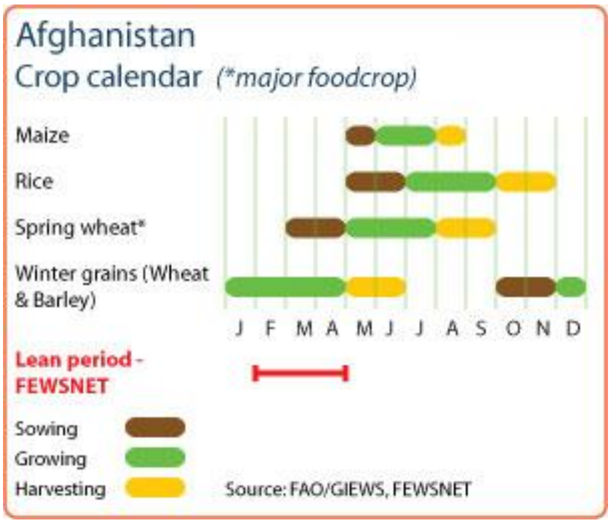
In 2009 wheat harvest almost doubled from the drought affected output of 2008. An expansion in area planted due to the successful poppy cultivation reduction program, favourable weather conditions and increased use of agricultural inputs.

Total cereal output for 2010, is estimated at 5.9 million tonnes (including rice in paddy terms) some 10 percent below the bumper crop of 2009. Consequently imports of wheat and rice for 2010/11 marketing year (July/June) are expected to decline. However, in spite of favourable harvests, cereal imports during 2009/10 were over 2.5 million tonnes, possibly for stock building purposes.

Wheat prices have risen in recent months after having declined from June 2008

Prices of wheat and wheat flour that had steadily declined for two consecutive years increased in most urban markets in July and August, The average price of wheat in August at AFN 15.2/kg was 9 percent above its July level. Prices of wheat flour in most border city markets has shown larger increases in response to the recent crisis due to flooding in neighbouring Pakistan, At the current levels, wheat prices are still below the levels of August 2009 and 2008 but an average 7 percent higher than in the pre-crisis period of January-October 2007.

Pockets of food insecurity remain despite

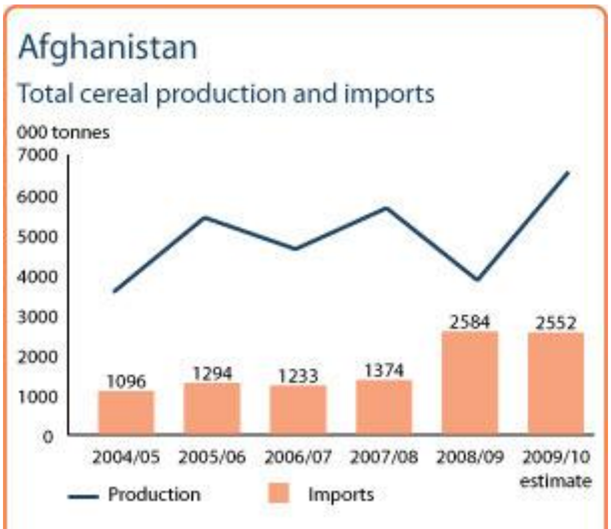


Afghanistan

Cereal production

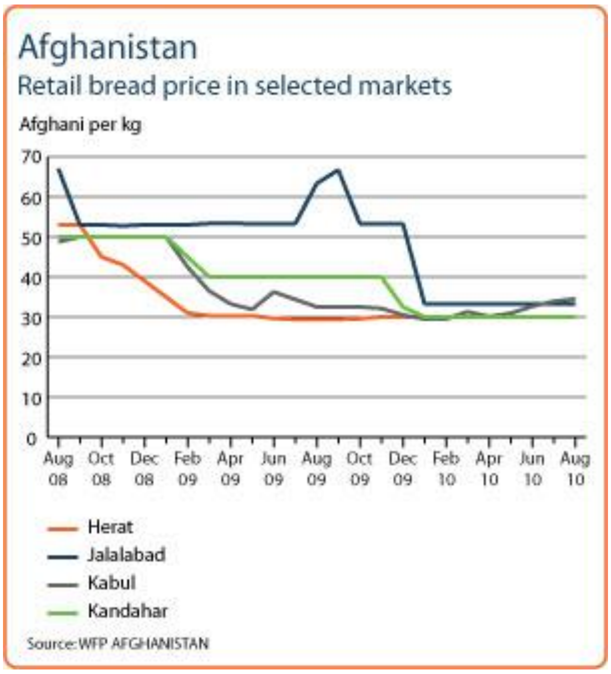
	2005-2009 average	2009	2010 forecast	change 2010/2009
	000 tonnes			percent
Wheat	3942	5115	4532	-11
Rice (paddy)	584	645	610	-5
Barley	378	486	437	-10
Others	328	319	316	-1
Total	5232	6565	5895	-10

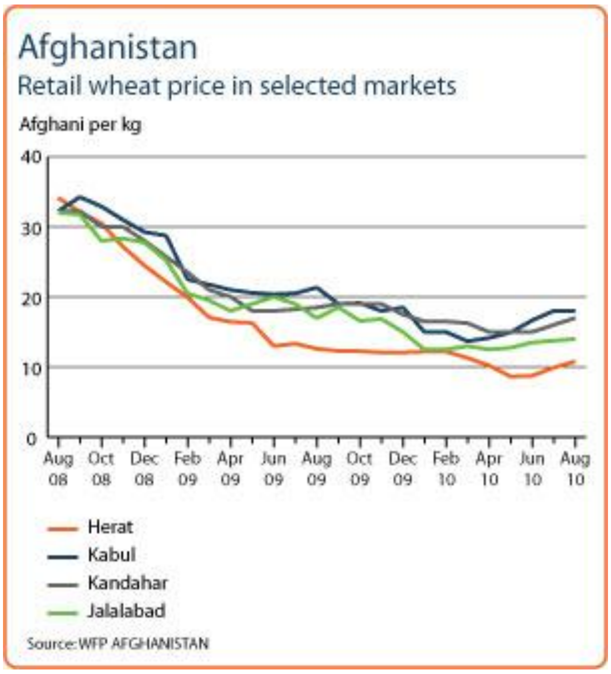
Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets



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

On the whole, following two successive bumper wheat harvests, large carry-over stocks, reduced wheat imports requirements in 2010/11 (July/June) and satisfactory export availabilities in Kazakhstan and Pakistan, the national wheat supply situation in Afghanistan is expected to remain satisfactory in marketing year 2010/11 (July/June). However, given the continuing low purchasing power due to long standing conflicts, erosion of incomes and assets, pockets of food insecurity exist in the country.





GIEWS Country Brief

Afghanistan

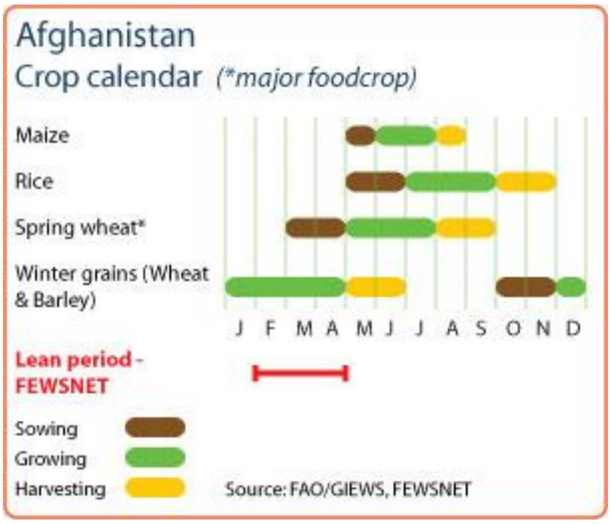
Reference Date: 12-July-2010

FOOD SECURITY SNAPSHOT

- 2010 winter wheat harvest estimated lower than last year's record level but still above average.
- Wheat prices continue to decline in the first half of 2010 but remain slightly above the pre-crisis levels of 2007.
- Pockets of food insecurity remain despite two consecutive good cereal harvests and declining wheat prices.

Winter wheat harvest below last year's record level

Winter wheat harvest is almost completed by now but spring wheat will be ready for harvest in August and September. The Ministry of Agriculture, Irrigation and Livestock (MAIL) has forecast 2010 wheat production at 4.53 million tonnes, about 10 percent below last year's record crop but some 14 percent above average. About 68 percent of the production comes from the 46 percent of area under irrigation. According to the MAIL Report this reasonably good harvest was due to the generally satisfactory rainfall distribution, especially in the beginning and the later part of the season, increased use of improved seeds and fertilizers and timely control of pests and diseases. A significant increase in the area planted with fruit trees has been reported. The overall conditions of cereal and horticultural crops, as well as animal health and animal production are satisfactory.



Afghanistan

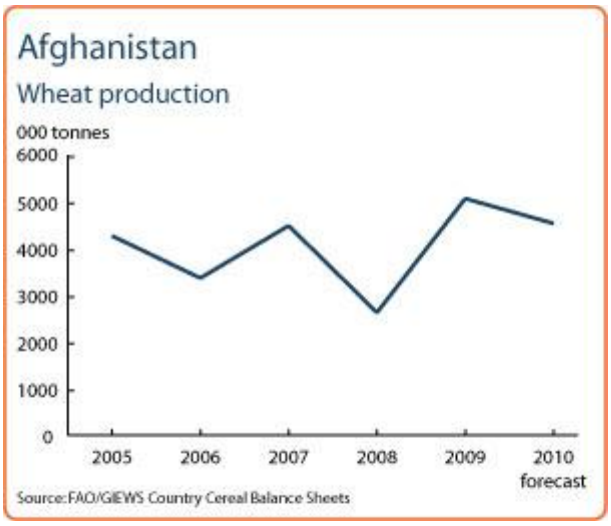
Cereal production

	2005-2009 average	2009	2010 forecast	change 2010/2009
	000 tonnes			percent
Wheat	3960	5064	4532	-11
Rice (paddy)	595	700	740	6
Barley	378	486	437	-10
Others	328	319	316	-1
Total	5261	6569	6025	-8

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

Bumper cereal harvest in 2009 improved food availability

The official estimate of 2009 wheat harvest put it at a record level of 5.064 million tonnes, almost doubling the drought affected output of 2008. An expansion in area planted due to the successful poppy cultivation reduction program, favourable weather conditions and increased use of agricultural inputs. Total cereal output for 2009, was also record at 6.56 million tonnes (including rice in paddy terms) Consequently imports of wheat and rice for 2009/2010 marketing year (July/June) declined to about 1.5 million tonnes. Due to the favourable carryover stocks into the new marketing year further decline in imports is foreseen in 2010/11.

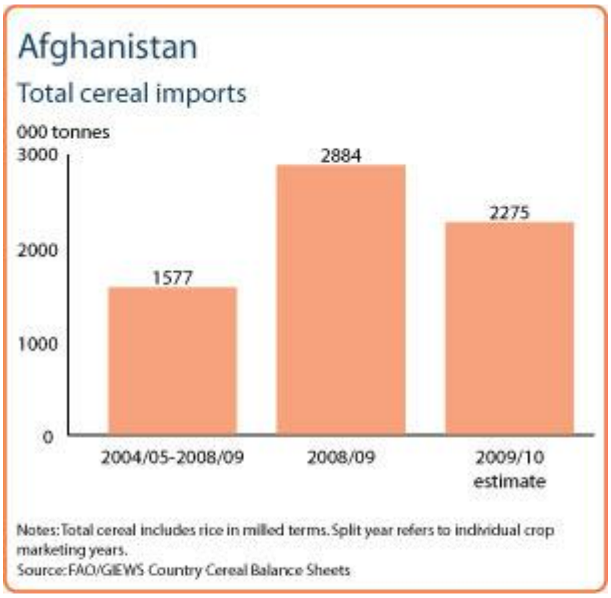


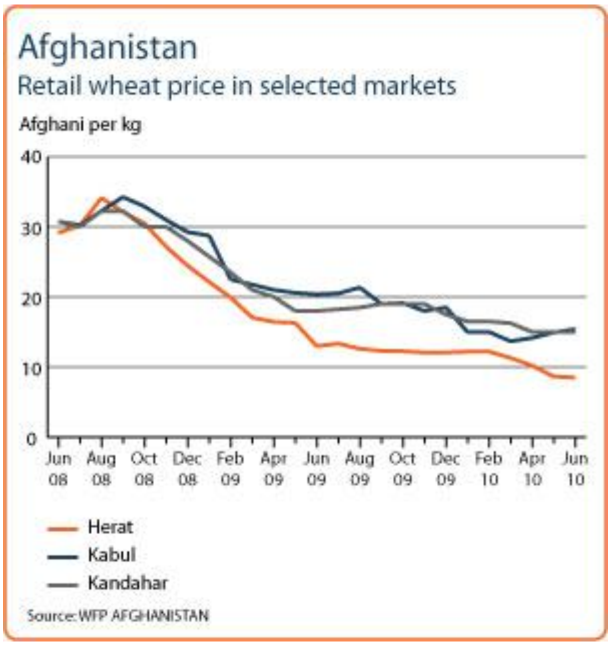
Wheat prices continue to decline with the new harvest but remain slightly above the pre-crisis levels of 2007

In response to a second consecutive bumper harvest, prices of wheat have declined in most parts of the country since their peak in July 2008. May-June prices came down in wheat surplus producing areas such as Herat in the west but prices firmed up in the deficit areas such as Kabul in the east. Nevertheless the current prices remain somewhat higher than during the pre-crisis period of 2007. A similar pattern is found in other selected markets in the country.

Pockets of food insecurity remain despite

With two consecutive bumper harvests of wheat and resulting low prices food security in general has improved significantly throughout the country. However, given the continuing low purchasing power due to long standing conflicts, erosion of incomes and assets, pockets of food insecurity exist in the country.





GIEWS Country Brief

Afghanistan

Reference Date: 01-April-2010

FOOD SECURITY SNAPSHOT

- 2010 winter and spring wheat crop is emerging/growing under favourable weather conditions.
- Wheat prices are down from the peaks of May 2008 but remain slightly above the pre-crisis levels of 2007.
- Pockets of food insecurity remain despite bumper harvest last year and declining wheat prices.

Winter and spring wheat crops developing under generally favourable conditions

Planting of 2009/10 spring season is virtually completed by now. In general normal to above normal snow fall was experienced during the winter months. However, reports indicate that warm temperatures have resulted in early snow melting which may result in deficit for irrigation water later in the season. In the northeast of the country, a six-week dry spell has resulted in a short-term dryness. However, it is too early to assess the impact of this on the crop growth as irrigation plays an important role in the final harvest result. Agricultural input availability for this season is considered to be better than in the previous year.

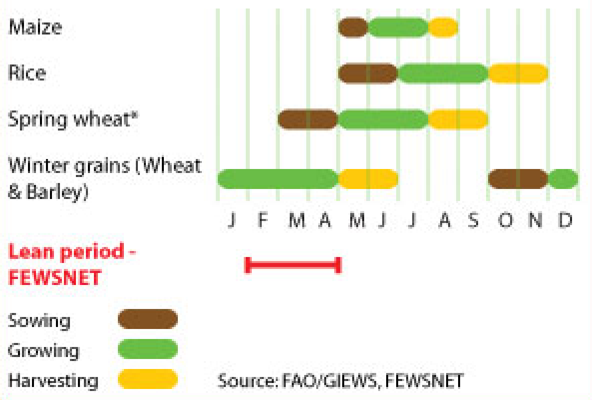
Bumper cereal harvest in 2009 has improved food availability

The Ministry of Agriculture, Irrigation and Livestock (MAIL) estimated the 2009 wheat harvest at a record level of 5.064 million tonnes. This represents a 93 percent increase over the drought affected output of 2008. The main reasons for this bumper crop are: the above average and well distributed rainfall throughout the country, increased use of improved seeds and chemical fertilizer, and the expansion in area planted (about 20 percent higher than the year before). Reportedly, the increase in crop plantings came about due to the successful poppy cultivation reduction program. Total cereal output for 2009, estimated at record level of 6.56 million tonnes (including rice in paddy terms), is about 70 percent above the depressed harvest in 2008. Consequently, imports of wheat and rice for 2009/2010 marketing year (July/June) are expected to go down to about 1.2 million tonnes. The livestock sector also benefited from the increase in grain harvest as well as from much better pasture and improved water levels.

Wheat prices have come down but still remain somewhat above the pre-crisis levels of 2007

In response to the bumper harvest throughout the country prices of wheat have come down. For example, wheat retail price in Kabul in the central region has decreased from a peak of AFN 39/kg in May 2008 to AFN 15/kg in February 2010. Never-the-less the current prices remain somewhat

Afghanistan
Crop calendar *(*major foodcrop)*

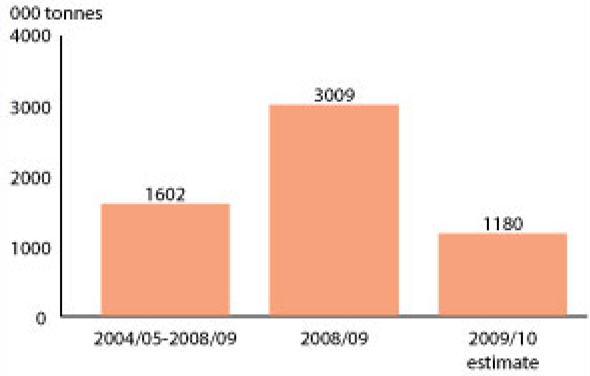


Afghanistan
Cereal production

	2004-2008 average	2008	2009 estimate	change 2009/2008
	000 tonnes			percent
Wheat	3378	2623	5064	93
Rice (paddy)	548	612	700	14
Barley	325	333	480	44
Others	329	292	319	9
Total	4579	3860	6563	70

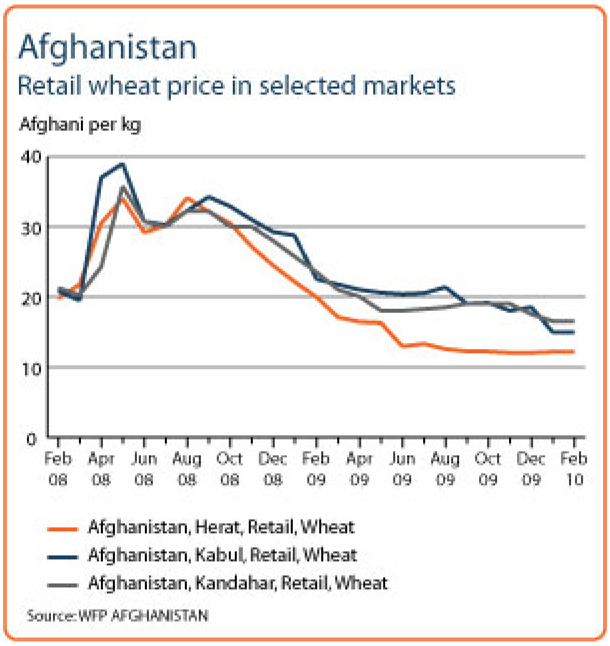
Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets

Afghanistan
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

higher than during the pre-crisis period of 2007. A similar trend is found in other selected markets in the country. Prices of wheat in Herat, a western city, are much lower. This could be possibly due to the reduced cross border trade on the western side with Iran as a good wheat harvest is estimated there and the fact that much of the demand from Kabul on the east is supplied through the highly productive central region.



Pocket of food insecurity remain despite declining wheat prices

The record high wheat harvest earlier this year and declining staple food prices have resulted in improved access to food throughout the country. However, given the continuing low purchasing power due to long standing conflicts, erosion of incomes and assets, pockets of food insecurity exist in the country. Under its Protracted Relief and Rehabilitation Operation (PRRO), WFP has programmed for the year 2009 some 318 000 tonnes of food distributions including 226 000 tonnes of cereals for about 8.8 million beneficiaries. Some of this food is to be prepositioned in inaccessible winter-isolated provinces.

GIEWS Country Brief

Afghanistan

Reference Date: 04-December-2009

FOOD SECURITY SNAPSHOT

- Record 2009 cereal harvest estimated due to increased yield and area planted.
- Wheat prices are down from the peaks of May 2008 but levelling off for the last few months.
- Pockets of food insecurity remain despite bumper harvest and declining wheat prices.

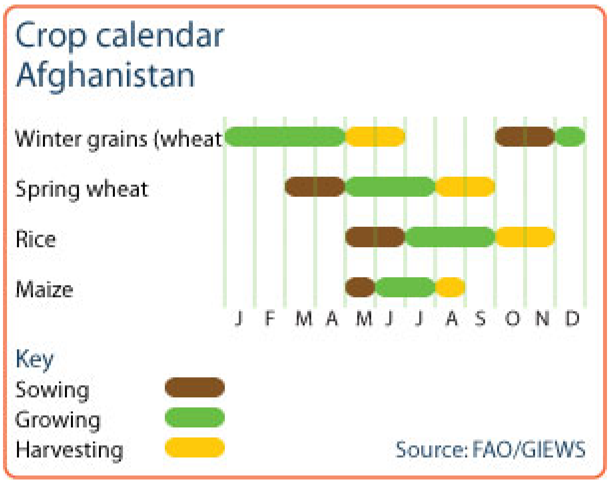
Favourable weather and use of improved inputs resulted in a bumper cereal harvest in 2009

Harvesting of winter and spring wheat is now completed. The Ministry of Agriculture, Irrigation and Livestock (MAIL) has estimated the 2009 wheat harvest at a record level of 5.064 million tonnes. This represents a 93 percent increase over the drought affected output of 2008. The MAIL estimate is based on the provincial reports/feed, farmer interviews and crop cutting survey results. The main reasons for this bumper crop are: the above average and well distributed rainfall throughout the country, increased use of improved seeds and chemical fertilizer, and the expansion in area planted (about 20 percent higher than the year before). According to the report, the area planted to paddy May-June has also increased. Reportedly, the increase in crop plantings has come about due to the successful poppy cultivation reduction program. Total cereal output for 2009, estimated at record level of 6.33 million tonnes, is about 73 percent above the depressed harvest in 2008. Consequently, imports of wheat and rice for 2009/2010 marketing year (July/June) are expected to go down to about 600 000 tonnes. The livestock sector will also benefit from the increase in grain harvest as well as from much better pasture and improved water levels.

Wheat prices have come down but still remain above the levels of 2007

In response to the bumper harvest throughout the country prices of wheat have come down. For example, wheat retail price in Kabul in the central region has come down from a peak of AFN 39/kg in May 2008 to AFN 19/kg in September 2009. Never-the-less the current prices in general remain much higher than during the pre-crisis period of 2007. Prices are beginning to inch upwards since hitting the post-harvest low in June-July. A similar trend is found in Kandahar, a major southern city market. This pattern is very similar to the international export price of wheat. Prices of wheat in Herat, a western city, are much lower. This could be possibly due to the reduced cross border trade on the western side with Iran as a good wheat harvest is estimated there and the fact that much of the demand from Kabul on the east is supplied through the highly productive central region.

Food insecurity remains widespread despite

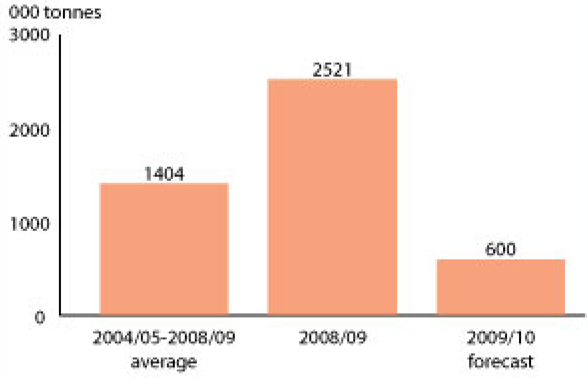


Afghanistan
Cereal production

	2004-2008 average	2008	2009 forecast	change 2009/2008
	000 tonnes			percent
Wheat	3378	2623	5064	93
Rice (in paddy terms)	548	612	700	14
Barley	325	333	480	44
Others	329	292	319	9
Total	4579	3860	6563	70

Note: percentage change calculated from unrounded data.

Total cereal imports

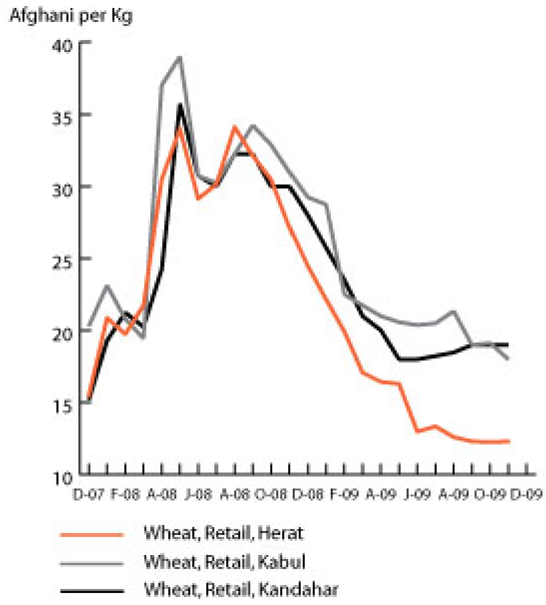


Notes: Total cereals includes rice in milled terms. Split year refers to individual crop marketing years.
Source: FAO/GIEWS Country Cereal Balance Sheets

declining wheat prices

With the record high wheat harvest earlier this year food supply situation and also access to food have improved significantly. However, given the existing underlying causes of low purchasing power such as the long standing conflicts, erosion of incomes and assets, pockets of food insecurity exist in the country. Under its Protracted Relief and Rehabilitation Operation (PRRO), WFP has programmed for the year 2009 some 318 000 tonnes of food including 226 000 tonnes of cereals for about 8.8 million beneficiaries. Some of this food is to be prepositioned in inaccessible winter-isolated provinces.

Afghanistan
Wheat prices in selected markets



Source: WFP AFGHANISTAN

GIEWS Country Brief

Afghanistan

Reference Date: 05-October-2009

FOOD SECURITY SNAPSHOT

- Record 2009 cereal harvest estimated due to increased yield and area planted.
- Wheat prices are down from the peaks of May 2008 but levelling off for the last few months.
- Food insecurity remains widespread despite declining wheat prices.

Favourable weather and use of improved inputs result in a bumper cereal harvest in 2009

Harvesting of winter and spring wheat is now completed. The Ministry of Agriculture, Irrigation and Livestock (MAIL) has estimated the 2009 wheat harvest at record level of 5.064 million tonnes. This represents a 93 percent increase over the drought affected output of 2008. The MAIL estimate is based on the provincial reports/feed, farmer interviews and crop cutting survey results. The main reasons for this bumper crop are: the above average and well distributed rainfall throughout the country, increased use of improved seeds and chemical fertilizer, and the expansion in area planted (about 20 percent higher than the year before). According to the report the area planted to paddy May-June has also increased. Reportedly, the increase in crop plantings has come about due to the successful poppy cultivation reduction program. Total cereal output for 2009, estimated at record level of 6.33 million tonnes is about 73 percent above the depressed harvest in 2008. The livestock sector will also benefit from the increase in grain harvest as well as from much better pasture and improved water levels.

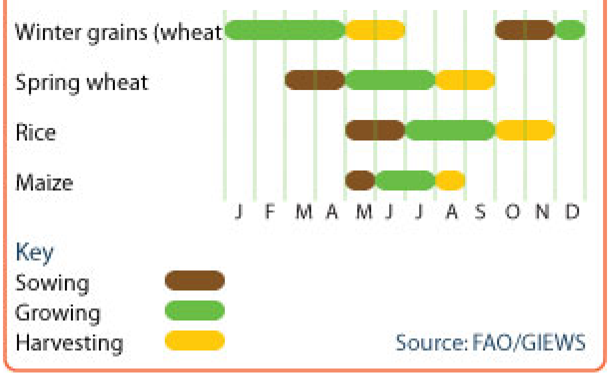
Wheat prices have come down but still remain above the levels in 2007

In response to the bumper harvest throughout the country prices of wheat have come down. For example, wheat retail price in Kabul in the central region has come down from a peak of AFN 39/kg in May 2008 to AFN 21/kg in September 2009. Never-the-less the current prices in general remain much higher their level during the pre-crisis period of 2007. Prices are beginning to inch upwards since the hitting the post-harvest low in June-July. Similar trend is found in Kandahar, a major southern city market. This pattern is very similar to the international export price of wheat. Prices of wheat in Herat, a western city, are much lower. This could be possibly due to the reduced cross border trade on the western side with Iran as a good wheat harvest is estimated there and the fact that much of the demand from Kabul on the east is supplied through highly productive central region.

Food insecurity remains widespread despite declining wheat prices

Food supply conditions will improve this year compared to 2008 especially the low wheat prices given that wheat is the major part

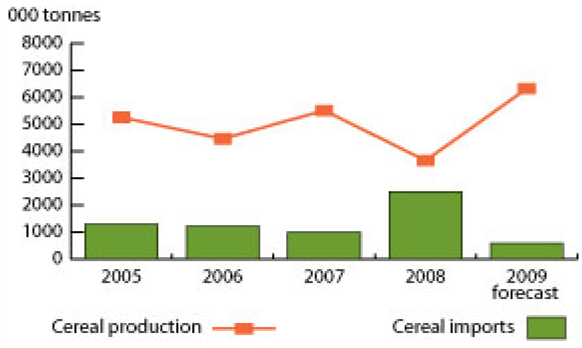
Crop calendar
Afghanistan



Source: FAO/GIEWS

Cereal production and imports
Afghanistan

Cereal production	2004-2008 average	2008	2009 forecast	change 2009/2008
	000 tonnes			percent
Wheat	3378	2623	5064	93.1%
Rice (milled)	366	410	469	14.4%
Barley	325	333	480	44.1%
Other	337	292	319	9.2%
Total Cereals	4397	3658	6332	73.1%



Source: FAO/GIEWS Country Cereal Balance Sheets

of Afghani diet. However, given the long standing conflicts the level of incomes and gradual loss of family assets over past years, food insecurity remains widespread. Under its Protracted Relief and Rehabilitation Operation (PRRO), WFP has programmed for the year 2009 some 318 000 tonnes of food including 226 000 tonnes of cereals for about 8.8 million beneficiaries. Some of this food is to be prepositioned in inaccessible winter-isolated provinces.