



## 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

### Mixed prospects for 2017 winter grains

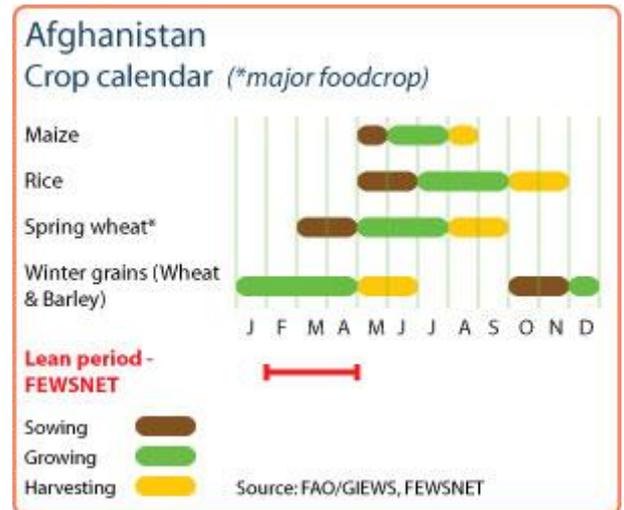
Planting of winter barley and wheat for harvesting from May 2017 was completed by the end of November. Dry weather conditions and resulting limited soil moisture delayed plantings in some areas, while some farmers postponed wheat planting until spring. Official estimates for planted area are not yet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



**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
<b>Total</b>	<b>6 167</b>	<b>6 023</b>	<b>5 894</b>	<b>-2</b>

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

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

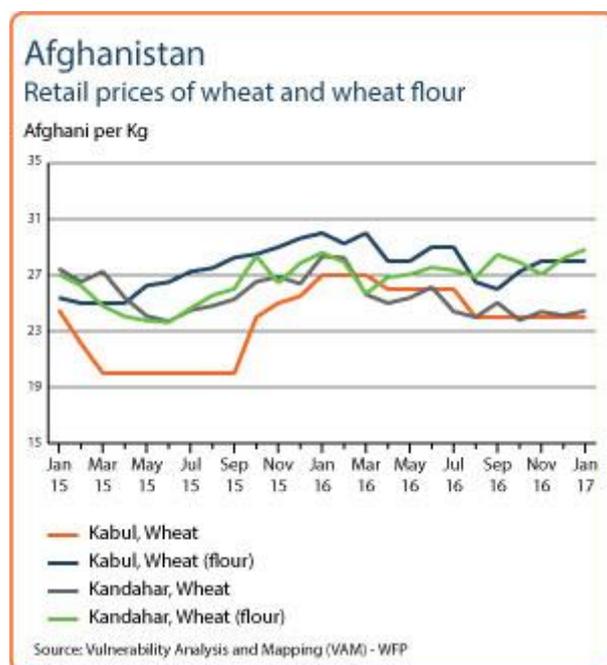
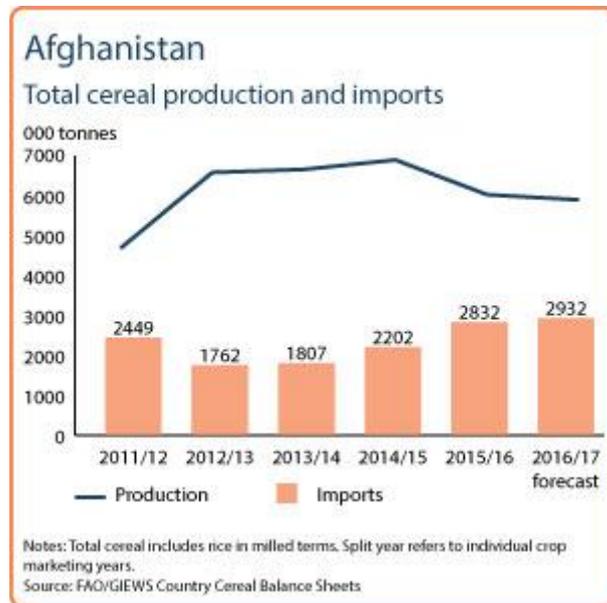
In the last six months to January 2017, wheat grain prices in Kabul and Kandahar markets remained stable, while wheat flour prices experienced greater volatility. Large price differentials persist among different areas of the country: wheat grain is almost 30 percent more expensive in Kandahar than in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