AFGHANISTAN Food Security Outlook February to September 2020

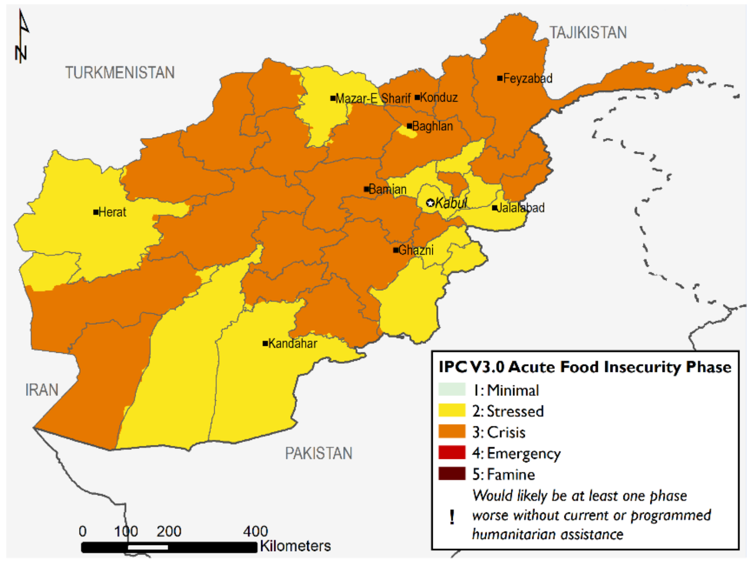
Despite likely near average harvest, poor labor markets drive acute food insecurity

KEY MESSAGES

- Crisis (IPC phase 3) persists in western, southern, central, and northern areas of the country where households have depleted food stocks and are reliant on markets with below average purchasing power. Crisis (IPC Phase 3) outcomes are expected to continue till the harvest in May across much of the country. Despite the anticipated near average harvest, Stressed (IPC Phase 2) outcomes are expected as the result of persistent displacement and poor labor markets and access to incomes.

- Snow accumulation and precipitation for the ongoing 2019/20 wet season has been average to above average across most of the country. However, precipitation is well below average for the season through February 2020 in the northern parts of the country bordering Turkmenistan, Uzbekistan, and Tajikistan. The area planted for winter wheat is average across much of the country; however, in northern areas area planted is below average. In northern provinces, farmers are awaiting the spring rains to plant spring wheat in March/April.

Current food security outcomes, February 2020



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- Labor opportunities across the country have declined as the result of increased labor supply, market access, and decreased availability of non-agriculture activities. Access to remittances has also decreased as Afghans continue to return from Iran and Pakistan. Agriculture labor is expected to increase with the start of Spring; however, income from this source will be below average.

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NATIONAL OVERVIEW

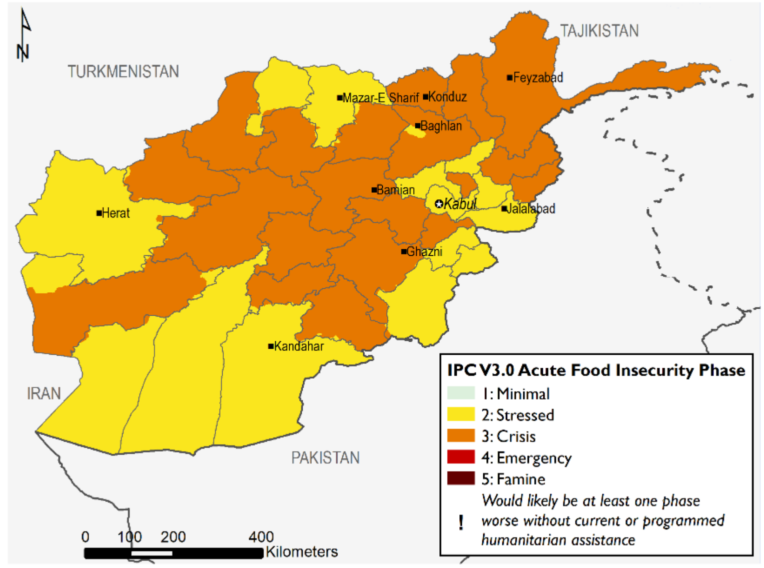
Current Situation

Despite the favorable 2019 season with near average stable food production and many households accessing own foods through the lean season, households are still experiencing a more severe than typical lean season. This is the result of a weak labor market, conflict, and recovery from the 2018/19 drought. Many households have nearly exhausted or completely exhausted food stocks and have limited access to labor and food markets due to conflict and the ongoing winter. Even during a normal year, many poor households and internally displaced people (IDPs) have trouble accessing sufficient food from February to April.

The conflict in Afghanistan is one of the deadliest worldwide which has resulted in over 10,000 casualties in 2019 according the United Nations Assistance Mission in Afghanistan; and has resulted in over 437,000 people displaced people in 2019. Conflict typically decreases in the winter months due to snowfall restricting movements in many areas of the country. Conflict between state and non-state actors seasonally decreased in January and remains low (Figure 1). According to ACLED, conflict

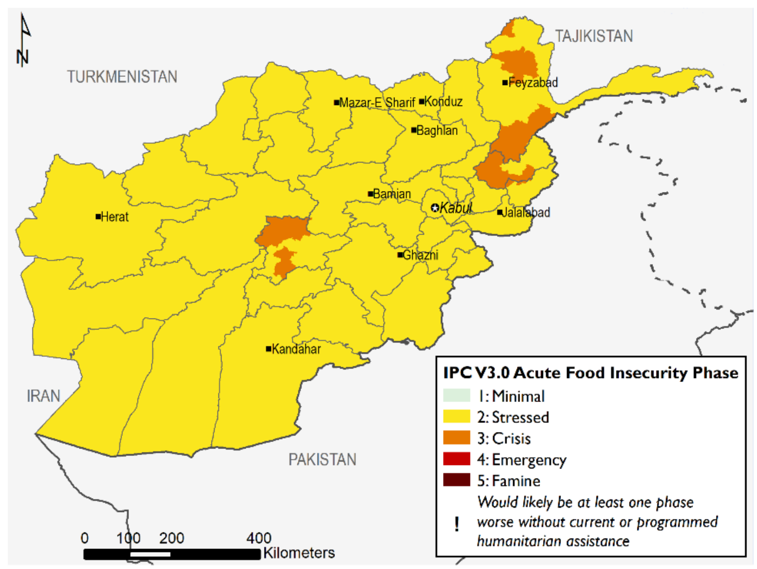
in January 2020 decreased by about 50 percent compared with December 2019. The highest concentration of conflict was reported in Balkh, Faryab, Helmand, Kandahar, Kunduz, Nangahar, and Urozgan Provinces in January through mid-February.

Projected food security outcomes, February to May 2020



Source: *FEWS NET*

Projected food security outcomes, June to September 2020



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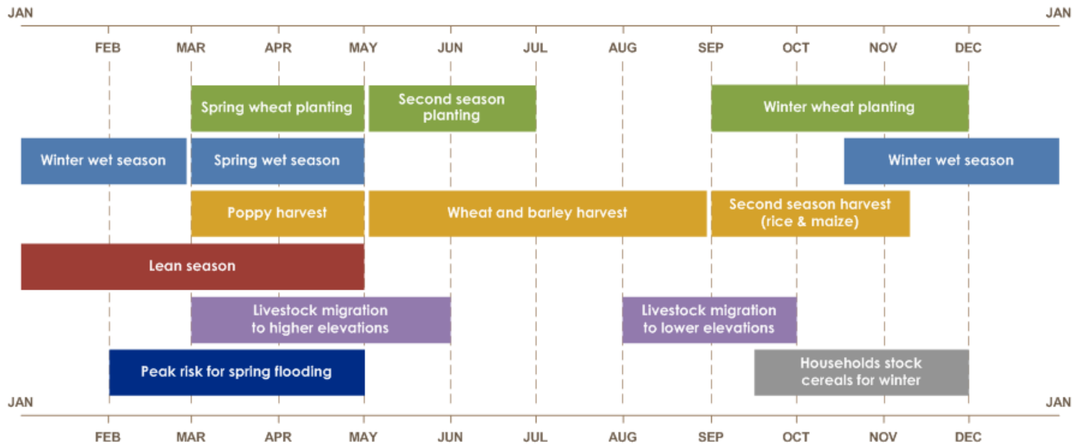
In areas where conflict is more concentrated and frequent, households typically remain displaced for longer periods of time, have difficulty integrating into their host community and finding new income and food sources. Households, in areas where conflict is not protracted, return to their place of origin as they are able to rebuild their livelihoods. In the winter, displaced households have particular difficulty accessing food and income as these sources are not readily available. On February 22, state and non-state actors called for a 7-day cease fire which will likely result in a further decrease in conflict events and displacement. Additionally, households as able are likely to have slowly started returning to their place of origin.

Many households during the winter months rely on remittances from migrant workers in Iran and Pakistan as well other Gulf countries. Remittances from Gulf countries continue to be stable; however, remittances from Iran and Pakistan are significantly below average. This is the result of over 1.3 million people returning from Iran and Pakistan in 2018 and 2019. In January 2002, nearly 30,000 people returned from Iran and Pakistan, mostly returnees repatriating from Iran. Additionally, fewer people are choosing to leave Afghanistan for Iran and Pakistan as visa policies and poor macroeconomies in both countries has deterred migrants. Generally, incomes during the winter are limited; however, incomes are below average due to below average remittances from both urban areas in Afghanistan and remittances from abroad, along with a weak labor market.

SEASONAL CALENDAR FOR A TYPICAL YEAR



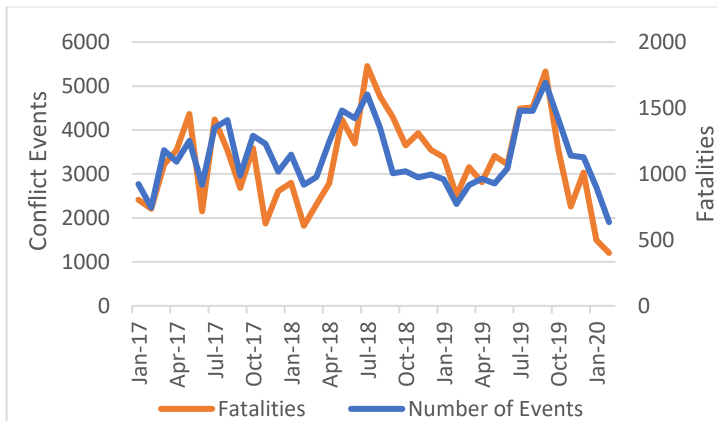
Source: *FEWS NET*

Afghanistan is continuing to rely on imports from Kazakhstan and Pakistan to stabilize market supplies even though aggregate nation production was near average. Imports from Kazakhstan continue at normal levels; however, Pakistan wheat is imported at minimal levels as Pakistan's surplus for export is below average. As a result of Afghanistan's reduced import requirement, both of these countries exports to Afghanistan continue at slightly below average levels.

In late February, the Government of Afghanistan began restricting some economic activities along the border with Iran as the result of coronavirus being reported in Herat. This is likely to have some impact on Afghan migrants' access to labor income in Iran as well as restricting the cross-border flow of goods.

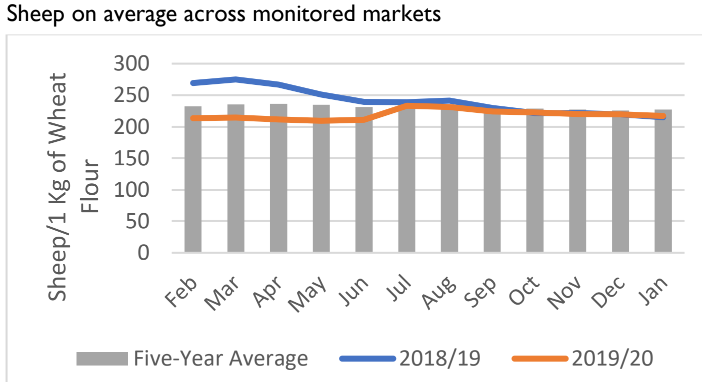
According to WFP January price data, on average monthly wheat flour (low quality) prices in main urban markets was 28.5 Afghan Afghani (AFN)/kg. On average, wheat prices remained stable across the country with about a 1 percent price increase from December 2019 to January 2020. The highest price increase was in Kandahar, with a 7.1 percent increase. This was the result of a decrease in market supply.

Figure 1. Number of conflict events and fatalities from January 2017 to January 2020 by month



Source: *ACLED*

Figure 2. Sheep to Wheat Flour Terms of Trade in AFN/1 Female Sheep on average across monitored markets

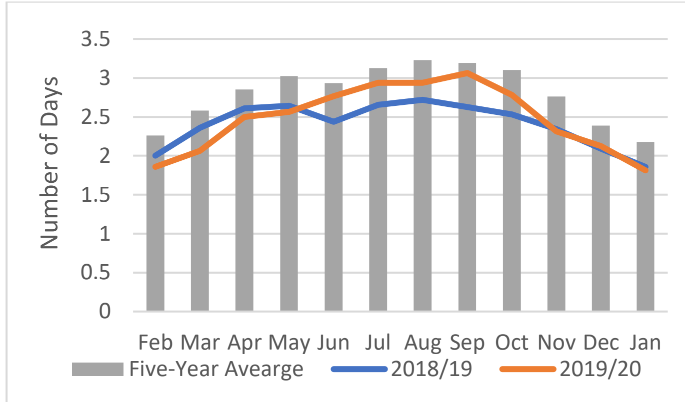


Source: *WFP*

Sheep to wheat flour average terms of trade (ToT) in January 2020 was 189.6 kgs of wheat flour per a one-year old female sheep, which is negligible improvement compared to December (Figure 2). The variation within all markets was within normal range, except in Kandahar where the ToT deteriorated by 5.2 percent due to increased wheat flour prices.

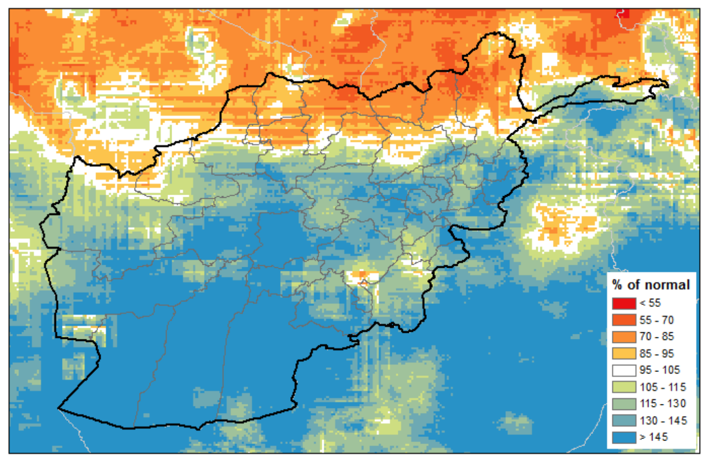
As winter is ongoing, and snow is covering much of the country or the ground is frozen, labor availability is low, and supply is high. An atypically low number of agriculture labor opportunities, even for this time of year, are available across the country (Figure 3). This is the result of the above average snowpack in higher elevated areas, poor precipitation in the north, and conflict related displacement. Those who access labor opportunities are accessing below average wage labor for this time of year. According to the Ministry of Agriculture, Irrigation, and Livestock (MAIL) the highest number of working days are in the main urban markets; however, generally the number of labor days available is below average. The markets with the greatest number of labor days available are in Kabul, Mazar, Herat and Jalalabad. In more remote areas of the country, labor opportunities are very limited for this time of year. Agriculture and casual labor demand are below average in the central highlands, specifically in Bamyan and Daykundi provinces as well as northeastern parts of the country like Badakhshan and Nuristan. Wage rates remain near normal across the entire country.

Figure 3. Number of casual labor days available on average in monitored markets



Source: *WFP*

Figure 4. Accumulated precipitation as a percent of normal, October 1, 2019 to February 15, 2020



Source: *USGS/FEWS NET*

In the winter, most communities in the high-elevated areas rely on fodder to feed their livestock, while in the lower elevated areas, livestock feed on a mix of remaining grasses and fodder. Livestock body conditions are generally poor as is typical for this time of year; however, better than the same time last year due to favorable pasture during the 2019 summer and fall. Most poor households relying on livestock production for food, stocked enough fodder for the winter and are selling their livestock as needed to purchase food. Although, livestock deaths are occurring at typical seasonal rates.

Livestock herd sizes have slightly recovered since the 2017/18 drought; however, herd sizes remain below average for poor households who have small herds. These households do not have income to purchase livestock and are relying on births to regenerate their herd.

Well distributed precipitation was observed across much of the country during the October to mid-February period (Figure 4). However, precipitation in northern areas is below average with the largest deficits observed in areas of Kunduz, Takhar, and Badakhshan. The average to above-average precipitation provided favorable moisture conditions for timely winter wheat planting except in areas where precipitation has been below average. In northern parts of the country, where precipitation has been below-average winter wheat planting was below average. Additionally, the window for planting spring wheat is closing and rainfall is necessary in the first weeks of March to complete planting. The snowpack and snow water equivalent in higher elevated areas of the country is average to above average except in northern basins where precipitation has been suppressed.

In late-February, key informants indicated adult desert locusts were present in southern Afghanistan, specifically Khost Province. As vegetation and crops are just starting to regenerate, locusts will likely lay eggs in some isolated areas. According to FAO, desert locusts can invade southern Afghanistan when there are large swarms containing gregarious locusts in Pakistan. If these locusts are not contained, there is the potential for them to move to southern Afghanistan.

Based on results of nutrition (SMART) and mortality surveys conducted over the last 6 months by ACF, the prevalence of global acute malnutrition (GAM) by weight-for-height z-score (WHZ) were 13.5 percent (10.5 to 17.1, 95 percent CI), 12.8 percent (10.5 to 15.6 95 percent CI), 10.2 percent (7.9 to 13.0 95 percent CI), 9.3 percent (7.2 to 12 95 percent CI) in Helmand, Nuristan, Daykundi, and Kunduz province, respectively. The GAM prevalence in Helmand, Nuristan and Daykundi provinces is indicative of a "serious" level of malnutrition according to the WHO classification. In Kunduz, the GAM prevalence is "poor" according to the WHO classification.

According to the Food Security and Agriculture Cluster (FSAC), humanitarian food assistance continues across the country to IDPs, households affected by flooding, and to a few provinces that are a priority. Current and up to date data on humanitarian food assistance distribution, including the number of beneficiaries and ration size was unavailable. As such, this analysis includes the impacts of humanitarian food assistance only where data was available.

The majority of poor households in the central highlands and northeastern parts of the country are facing food consumption gaps as households have depleted their food stocks and face difficulty accessing income to purchase food. As a result, these

areas are in Crisis (IPC Phase 3). Crisis (IPC Phase 3) outcomes are present in some lower-elevated areas as well, where poor households are relying on non-agriculture labor. However, these opportunities are below average, and the households that are reliant of markets for food have below average purchasing power. Stressed (IPC Phase 2) outcomes are present in areas where households have access to remittances or near average labor opportunities.

Assumptions:

The February to September 2020 most likely scenario is based on the following national level assumptions:

- Based on accumulated precipitation through mid-February 2020 and forecast precipitation for March-May 2020, cumulative precipitation for the October 2019 to May 2020 wet season is anticipated to be average in western and northern Afghanistan and above average in central Afghanistan.
- The flooding risk is most likely to be normal over western and central Afghanistan due to below average snowpack through mid-February 2020. There is an elevated risk of flooding over northeastern Afghanistan due to an above average precipitation forecast from the end of March through May 2020.
- Due to average to above average snow water volumes across most basins, water availability for irrigated crops will likely be sufficient in most areas of the country. However, below average snow water volumes in some northeastern basins will likely result in limited and below average water availability for irrigated crops.
- Area planted for spring wheat is likely to be average across much of the country; however, area planted is expected to be below average in northern areas of the country.
- Production in the northeastern provinces of the country will most likely be below average as the result of the poor precipitation and water available for irrigation. Despite the likely below average production in northern areas, average winter wheat area planted and favorable precipitation across most of the country is expected to lead to near average national production. Desert locusts in the most likely scenario are expected to have very limited impacts.
- Imports of wheat from Kazakhstan and minimal imports from Pakistan are expected to fulfill Afghanistan's supply needs. This will likely result in stable, near average food prices.
- The availability of agriculture and non-agriculture opportunities is expected to be near normal; however due to the increased labor supply, the number of people accessing labor will most likely be above average. This is anticipated to
- result in below average employment opportunities. Additionally, due to the increased supply, wages will likely be below normal.
- Income from horticulture crops mainly apples, dry fruits and grapes during spring season will be average to above average and will also support agricultural labor income opportunities in areas where these crops are produced.
- Beginning in Spring, pasture and grazing conditions for livestock are expected to be above average as favorable precipitation from snow melts. This is expected to lead to normal livestock body conditions and productivity. Additionally, livestock births are expected to occur at normal rates, with livestock herd sizes continuing to recover from the 2017/18 drought. However, poor precipitation in northern parts of the country, will likely lead to below average pasture availability and below average livestock body conditions, births, and productivity. No atypical livestock migration is anticipated as herders will move their livestock to areas where pasture is available. As a result, livestock prices will most likely be average.
- Migrant workers, both undocumented and documented, are expected to continue returning to Afghanistan from Iran and Pakistan at levels above last year following normal seasonal trends. The rate of returnees from Iran are likely to slightly decrease to border closures; however, as the result of the poor Iranian economy will likely lead to below average remittances from Iran. Remittances from Persian Gulf Countries are expected to be near average. As a result, household incomes from remittances will most likely be below average.

- Poppy cultivation will likely provide a similar number of labor opportunities and incomes as in 2019 in southern and western parts of the country.
- Based on the political situation, conflict events are likely to decrease both seasonally as the result of the winter months and recent political events. Conflict will likely remain below normal at current levels and not reach levels seen during 2018 and 2019. This is expected to continue disrupting agriculture activities, especially where conflict is more frequent, and farmers are expected to have difficulty accessing their lands. However, IDPs are expected to remain displaced and slowly return to their places of origin where there are no new conflict events.

Most Likely Food Security Outcomes

In the northeast and central highlands of the country, poor households are expected to maintain Crisis (IPC Phase 3) outcomes through at least May 2020 with limited access to markets and already depleted food stocks from last season. The rest of the country will be experiencing Stressed (IPC Phase 2) due to slightly better access to incomes and continue reliance on food stocks. Considering the favorable climate condition and well distributed precipitation agriculture labor opportunities are expected to seasonally increase in March and April across much of the country, except in high-elevated areas of the country.

From June to September the food security situation in most of the country is expected to improve due to near to average wheat production. However, incomes are expected to remain below average, impacting household's ability to meet all of their non-food needs. As a result, Stressed (IPC Phase 2) outcomes are anticipated across much of the country. Crisis (IPC Phase 3) outcomes are expected to persist in remote areas that have experienced many years of conflict. In these areas, households have limited ability to participate in the ongoing agriculture season and access labor opportunities and ability to access income.

Crisis (IPC Phase 3) outcomes are expected in newly displaced households and those who have recently returned from Iran and Pakistan as they have difficulty accessing livelihood opportunities or finding income sources.

Events that Might Change the Outlook

Possible events over the next eight months that could change the most-likely scenario.

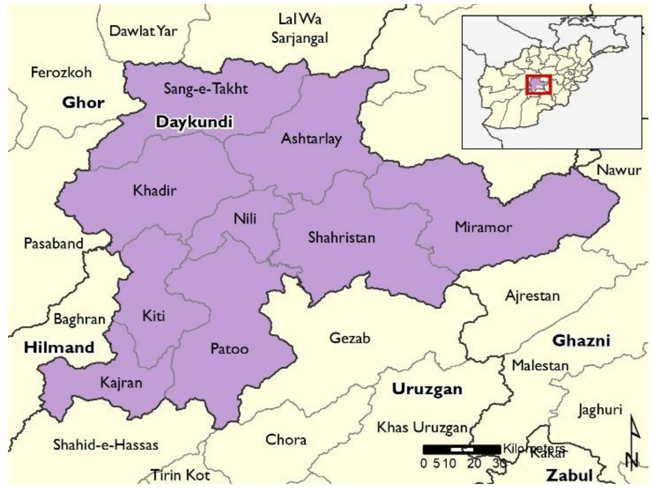
Area	Event	Impact on food security outcomes
National wide	Political Situation (on going Peace negotiations)	If there is a significant reduction in conflict, food security outcomes are expected to improve as access to the Spring agriculture season, normal livelihoods, and markets will return to normal function.
Southern Afghanistan	Desert Locust infestation	Migration of locust from Pakistan into southern parts of the country. If the desert locusts lay eggs from the adult swarms and hatch during the spring and control measures are limited or ineffective, desert locusts will have negative effects on the wheat and barley harvest in these areas. It is also expected that desert locusts will spread to other areas of the country as well from Iran if the infestation is not controlled there.

AREAS OF CONCERN

Internally Displaced Persons (IDPs)

In 2019, according to UNOCHA, over 455,000 individuals fled their homes due to conflict across the country and nearly 301,000 people were displaced by natural disasters. The highest-level of displacement occurred in western, southeast and southern part of the country. Conflict induced displacement has been reduced significantly by 18 percent when comparing to 2018 to 2019. Ongoing peace negotiations in the past few months has contributed to a decrease in displaced populations. During the scenario period the level of conflict is expected to be the same or lower than over the past two years. As a result, the level of displacement is likely to remain atypically low.

Figure 5. Area of concern reference map for Daykduni



Source: *FEWS NET*

IDPs are particularly vulnerable due to the loss of livelihoods and poor social networks in their place of displacement. IDPs in camps receive humanitarian food assistance; however, IDPs in unfamiliar host locations are unlikely to receive support. Due to two years of consecutive favorable climate conditions and relatively better security situation, at least one or two members

of the IDP households have returned to their place of origin. This is to start returning to their typical livelihoods and try to maintain their livestock and agriculture activities. During the upcoming Spring, IDPs are expected to have limited ability to participate in the ongoing season. This is due to the lack of ability to access land and inputs for the season. Agriculture labor opportunities are expected to increase in the Spring; however, competition for these opportunities are expected to remain high. Many IDPs are not expected to have a harvest or access livelihood opportunities. As a result, many of these households are expected to face Crisis (IPC Phase 3) or Stressed (IPC Phase 2).

Daykundi Province

Current Situation

Daykundi is mostly high-elevation rangeland with some irrigated land along river valleys and streams. Irrigated production of potatoes, wheat, and almonds, labor, and livestock are important livelihood activities in this province. However, one of the most important income sources in this area is remittances from Iran and Pakistan as well as urban areas of Afghanistan.

During the winter, since much of the area is covered with snow, labor opportunities are limited, which leads to labor migration of poor household members. Household members have migrated to Iran and urban areas of Afghanistan mostly.

Last year due to favorable climate conditions, incomes from livestock and horticulture sectors were at average levels and provided normal levels of food consumption. However, as is typical, household own food stocks are depleted during the winter and rely on selling and purchasing food from market.

Previously the flow of remittances from urban areas and Iran were considerable and typically, remittances seasonally increase during the winter months. Currently, due to the Iranian economic crisis and increases in returnees, the flow and quantity of remittances has significantly decreased from Iran. Remittances from urban areas are also below average due to above average competition on the labor market.

Livestock herds sizes have started to slowly regenerate since the 2017/18 drought; however, they remain below average. Pasture conditions were above average last season, and livestock body conditions improved during the months preceding winter to normal. However, livestock body conditions have seasonally decreased and are near normal for this time of year. Livestock productivity and milk availability is seasonally low.

Prices of food commodities, particularly imported wheat, in the main market of Daikundi is 3.0 percent above the five-year average and 2.8 percent compared to same time last year. Sheep to imported wheat ToT has deteriorated by 5 percent compared to the same time last year and by 18 percent compared to the five-years average. Deterioration in ToT is due to both a slight increase in food prices and decrease in livestock prices. Food prices in more remote areas of Daykundi, are due to high transportation costs and difficulty accessing some areas during the winter months. As a result, household purchasing power is below average.

Figure 5. Area of concern reference map for Nuristan

Source: *FEWS NET*

Chronic food insecurity is very high in this area due to households having limited ability to access food. Currently, poor households and newly displaced populations are in Crisis (IPC Phase 3).

Assumptions

The most likely scenario for the February 2020 to September 2020 is based on the national-level assumptions.

Most Likely Food Security Outcomes

In March with the onset of spring rains, planting for crops will most likely occur in rainfed areas, providing a few poor households with income from agricultural labor. Income earned from labor is expected to continue to be below-average as most households will likely self-plant their fields and may not depend on hired agriculture labor. Livestock migration to grazing areas is likely to typically occur as pasture continues to improve. Livestock herd sizes and body conditions will continue to improve, and households will be able to access milk and livestock products for income at the start of Spring. Income from remittances will remain below average as labor migration to Iran compared to other years will be below average. Market

access is anticipated to return to normal levels with the snow melt in the Spring. Crisis (IPC Phase 3) is anticipated as households will continue to face food consumption gaps due to limited income from labor and remittances as the harvest does not typically occur until late summer (August/September) as this is a high-elevation area.

Events that Might Change the Outlook

Possible events over the next eight months that could change the most-likely scenario for Daykundi are the same as the national-level events that might change the outlook.

Nuristan Province

Average precipitation was observed during the 2019 in Nuristan province and the wheat, maize, beans, and products of pine nuts and walnuts were near average. Livestock body conditions are good due to improved pasture conditions and there is currently enough dry feed to last through the lean season.

Prices of staple foods, mainly wheat flour, are relatively stable in this province, but typically higher compared to the national average due to higher transportation costs s this province is geographically remote.

Poor households are currently consuming livestock products such as milk, dried yogurt, cheese, and remaining stores of cereals harvested during the summer and fall. Due to small field sizes in Nuristan, additional maize and wheat is imported from the neighboring provincial markets of Mihterlam, Kunar, and Jalalabad. The main crops for household consumption are maize and beans which will be planted during April to May. Remittances from Jalalabad, neighboring provinces, and Iran are a source of income.

The very poor with little to no access to land, rely on incomes from agriculture and non-agricultural labor to buy maize, wheat flour along with resorting to coping strategies to survive the winter. Currently, market food availability is normal but due to very bad road conditions and expected road-closures due to snow and floods, food prices are expected to increase. Some households are expected to be in Stressed (IPC Phase 2) as these households currently have adequate food stocks due to close to average income from the sale of livestock products and walnuts. However, most poor households are expected to be in Crisis (IPC Phase 3). These households have little income from agriculture and non-agricultural labor incomes and limited to no food stocks.

Assumptions

The most likely scenario for the February 2020 to September 2020 is based on the national-level assumptions.

Most Likely Food Security Outcomes

From February to May 2020, snowfall is anticipated to continue limiting market and labor activities, limiting household's ability to purchase food. As the harvest is not expected in this area to start until August or September households are expected to continue facing Crisis (IPC Phase 3) outcomes.

From June to September, increased income from the second season planting activities and the wheat and barley harvest, along with increased production from livestock will improve food security situation. Households food security outcomes are anticipated to somewhat improve in central Nuristan from May to September due to the availability of labor opportunities incomes from livestock production and sales. Since the main harvest in this area is not until September/October, Crisis (IPC Phase 3) outcomes are expected to persist as the result of continued poor purchasing power and access to food.

Events that Might Change the Outlook

Possible events over the next eight months that could change the most-likely scenario from the national level hold true for Nuristan.

ABOUT SCENARIO DEVELOPMENT
To project food security outcomes, FEWS NET develops a set of assumptions about likely events, their effects, and the probable responses of various actors. FEWS NET analyzes these assumptions in the context of current conditions and local livelihoods to arrive at a most likely scenario for the coming eight months. Learn more here.