Food and Agriculture Organization of the United Nations

# GIEWS Country Brief
## Kyrgyzstan

**Reference Date: 12-July-2021**

**FOOD SECURITY SNAPSHOT**

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

### Slightly above-average cereal production forecast in 2021

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

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

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

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

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

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

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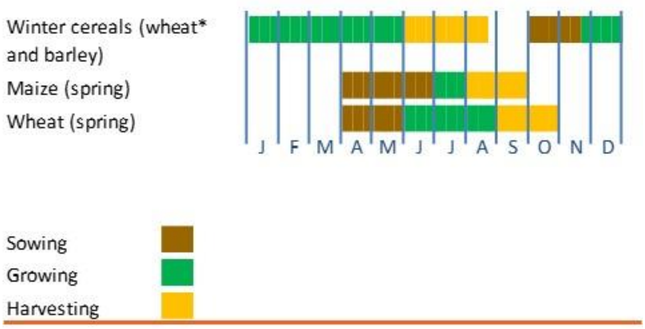
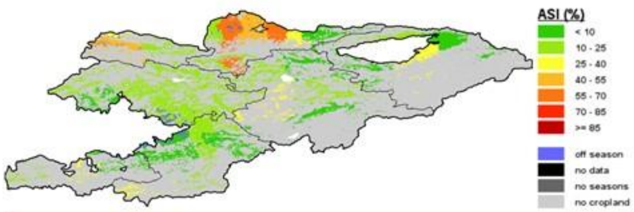
Crop Calendar *(*major foodcrop)*




Source: FAO/GIEWS.

**Kyrgyzstan - Agricultural Stress Index (ASI)**

from start of season 1 to dekad 3, June 2021




Source: FAO/GIEWS Earth Observation System.

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Cereal Production

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

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

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

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

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

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

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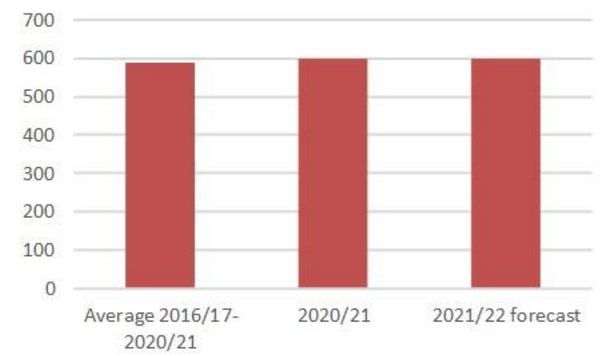
Wheat Imports

000 tonnes




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

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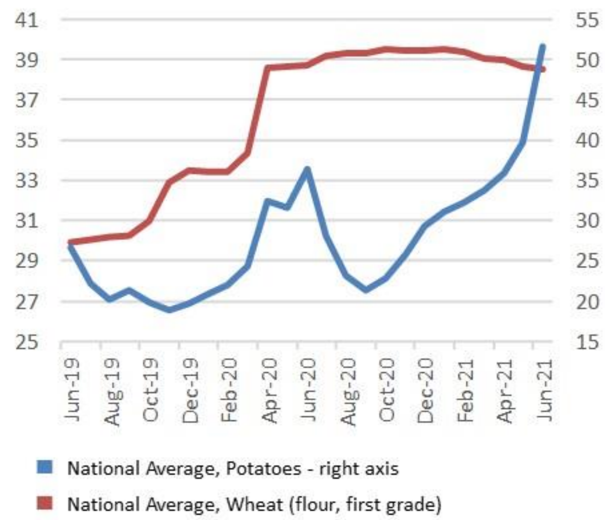
Retail potatoes and wheat flour prices

Som per kg




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

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