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**

Unfavourable conditions for sowing of 2022 winter wheat crop

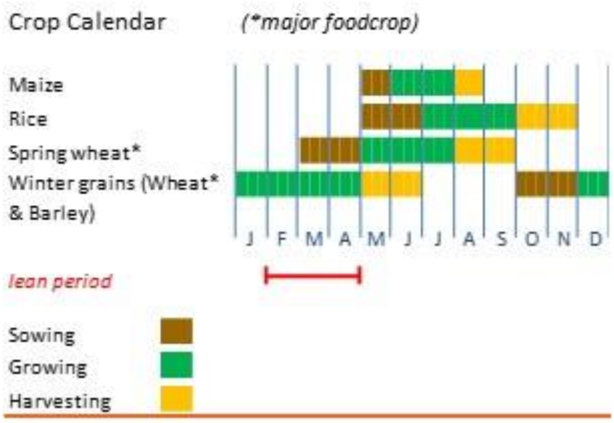
Planting of winter wheat and barley started in late October. In northern and northeastern parts of the country, the first significant rainfall occurred during early November, while the rest of the country remained dry. Cumulative rainfall amounts since September 2021 were about 30 percent below the average. 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

Afghanistan



Source: FAO/GIEWS, FEWSNET.

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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.

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

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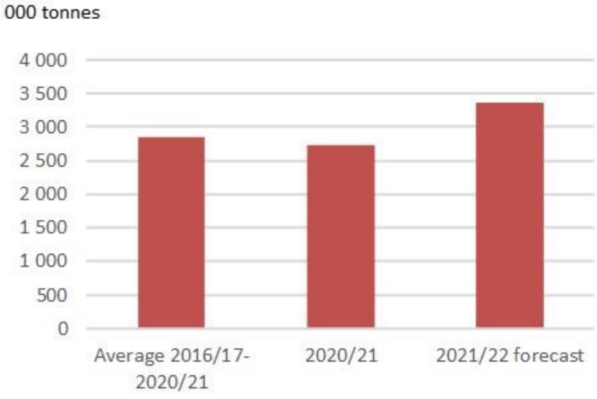
Cereals Imports



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.

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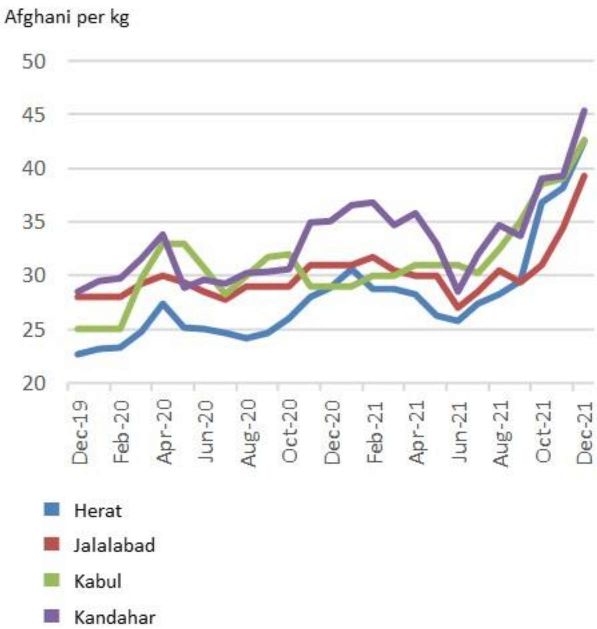
Wheat prices in selected markets

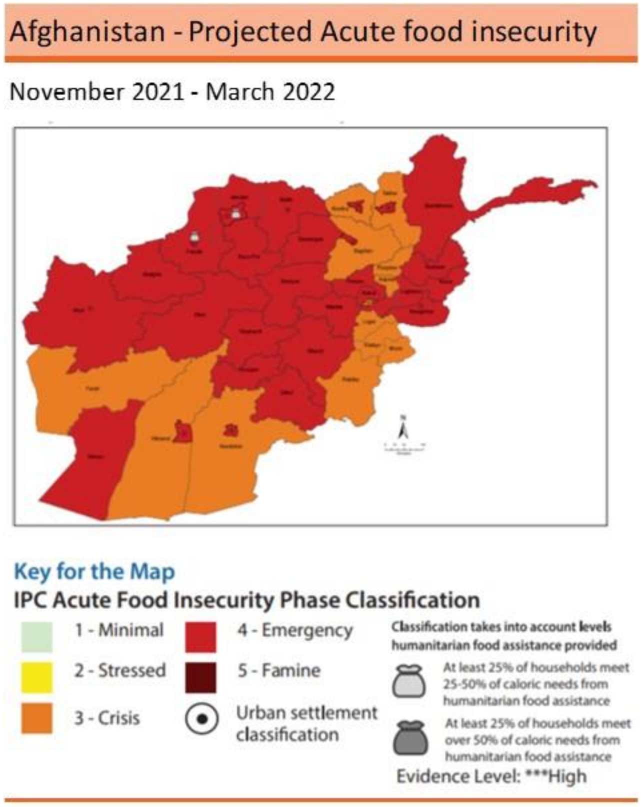


Source: FAO/GIEWS Food Price Monitoring and Analysis Tool.

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.

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