Food and Agriculture Organization
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GIEWS Country Brief
The Islamic Republic of Afghanistan

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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

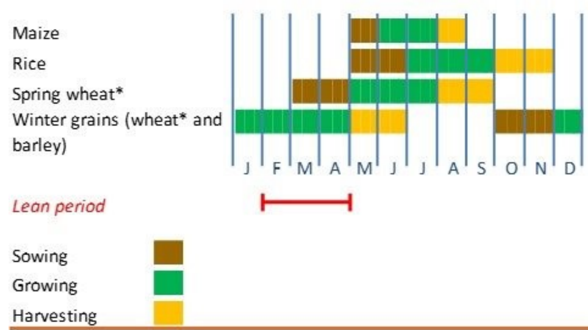
Planting of the 2023 spring wheat crop was concluded in April. Harvesting of the 2023 winter wheat and barley crops, planted in October 2022, started in May, but the bulk is usually harvested in June. As a result of the La Niña event which started in late 2020, most of the country experienced drought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

Crop Calendar *(*major foodcrop)*



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.

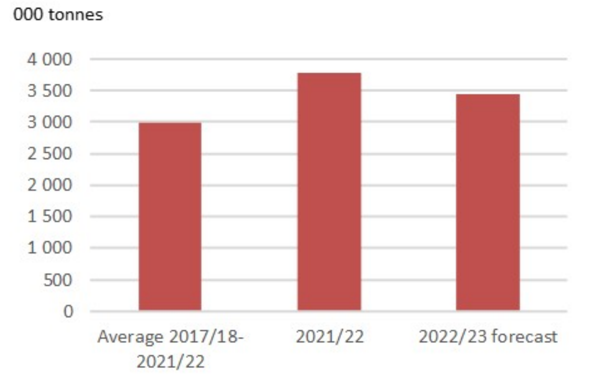
Below-average cereal harvest expected in 2023

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 animals, mostly due to lack of preparedness and eroded resilience capacity of the farmers who lacked the economic resources to ensure suitable winterization.

Afghanistan

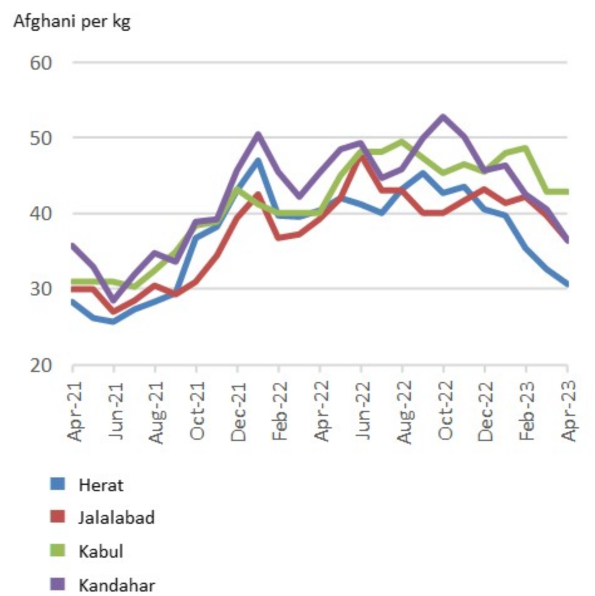
Cereals Imports



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/.