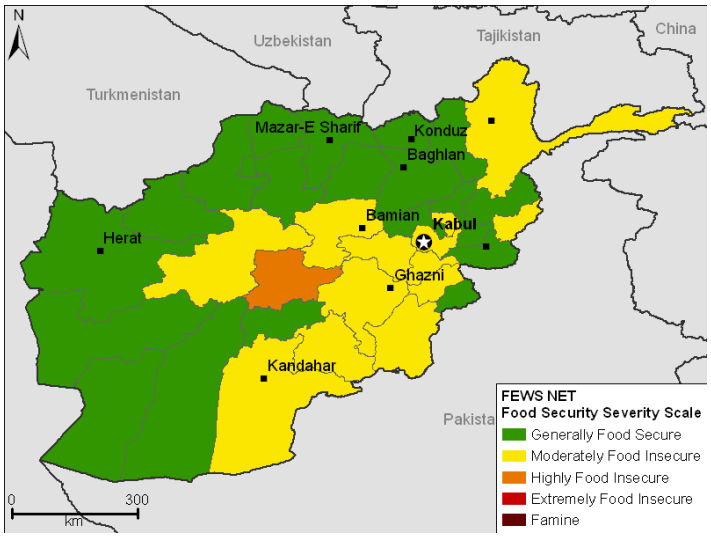
AFGHANISTAN Food Security Outlook — January to June 2010

- The food security situation going into the 2010 hunger season look optimistic in comparison to the past 9 years because of a good 2009 national and regional harvest, food aid distributions and favorable terms-of-trade. The hunger season ends in late March.

- During wintertime (January to March) some underlying determinants of food security deteriorate, including: labor opportunities decease, food market prices and accessibility worsen in rural areas and milk products reduce.

- Despite an early and strong wet season in October and November, a dry spell has occurred in December and January raising concern that snow packs will be low for the 2010 main cereal growing season. There is still two more months of snow and rainfall which could provide enough water for a successful growing year.

Figure 1: Current estimated food security conditions, January 2010

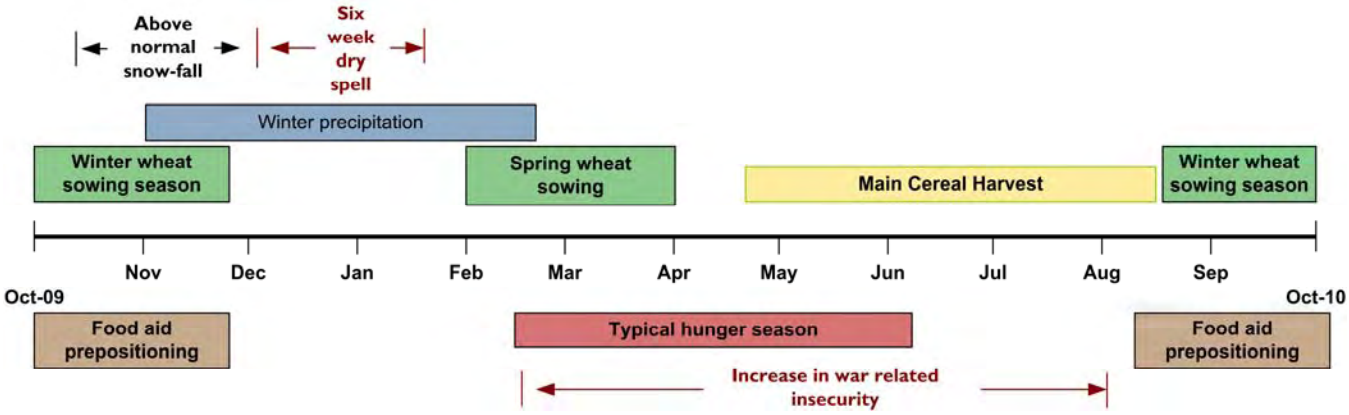


Source: *FEWS NET*

For more information on FEWS NET's Food Insecurity Severity Scale, see www.fews.net/FoodInsecurityScale

- December 2009 wheat market prices decreased in all reference markets compared to last year.

Seasonal calendar and critical events



Source: *FEWS NET*

FEWS NET Afghanistan
Kabul
fnajimi@fews.net

FEWS NET Washington
1717 H St NW
Washington DC 20006
info@fews.net

FEWS NET is a USAID funded activity. The authors' views expressed in this publication do not necessarily reflect the view of the United States Agency for International Development or the United States Government.

Current food security conditions

Afghanistan's current food security situation remains in better standing than it has in recent years. This is largely due to a good 2009 harvest, sufficient food aid coverage, and reduction of market wheat prices from last year. In addition, regional bumper harvests and favorable trade policies have improved access and availability of grains in the country. The substantial increase in food availability and improved food access compared to recent years indicates that there will be better than normal hunger season in the next three months. The six month scenario is highly contingent on the performance of winter precipitation, which has been erratic this season.

Nationally, the 2009 wheat harvest of 6.3 million metric tons almost met the entire Afghanistan food need of 6.5 million metrics tons. The gap in production was largely covered by 340,000 metric tons of food aid distribution by the Afghanistan government and WFP. In addition, bumper crops in the region allowed for favorable trade conditions for food imports which would further cover food needs. Despite the good harvest and food aid in Afghanistan, some provinces still have a food gap. In addition, it is not well understood if intra-country trade has left some provinces with shortages.

In the **central highland region**, Day Kundi and Bamyan remained short 31,000 and 6,000 metric tons of grains after the harvest. Despite possible food shortages, doubling of livestock prices and significant improvements in terms-of-trade between casual labor and wheat prices have improved food access.

Kandahar and Kohst provinces in the **south and southwest** regions of Afghanistan had a 70 and 50% food deficit after last summer's wheat harvest. The food security situation is considered to be moderately food insecure because of additional income from orchards, which had an especially good harvest last year. Khost is presumably receiving additional income from remittances and considerable amount of food aid (27,501 MT) was distributed in 2009. In south and southwest region, unknown numbers of war related IDPs are highly food insecurity as they leave their homes and livelihoods to stay in neighboring villages. Humanitarian assistance is largely not reaching IDPs not in IDP camps.

The **Kabul urban population** has rapidly increased in the past few years as people escape insecurity and repatriated Afghans migrate to Kabul. Because urban populations heavily depend on markets to access food and income, they are vulnerable to adverse changes in food prices, wages, or labor demand. Winter in Kabul is typically considered to be a lean period because food prices typically rise and casual labor becomes scarcer. Recent reports from UNICEF declared Kabul as having one of the worst conditions for Afghan children to live. This winter there are noticeable increases of children and others begging in the streets indicating a level of heightened food insecurity. Kinship in Kabul are not as strong as rural areas, leaving households with few coping strategies to employ.

USAID and WFP is undertaking food security programs in Kabul to assist households who are dependent on daily wages with additional cash for work programs that will target 500,000 daily laborers and WFP is providing cash voucher for 10,000 households headed by women or persons with disabilities. Similar programs are under way in other urban areas of Afghanistan. Food security conditions are expected to improve from March to October when there is more work opportunities.

The 2009-2010 wet season started strong with above normal precipitation in the form of rain and snow. These conditions helped with land preparation for winter wheat plantation and snow pack. These favorable conditions were followed by a dry spell in December and January. As of late January, there are seasonal precipitation deficits in the northeast provinces. Precipitation in the coming months will be important for the winter wheat harvest.

There are concerns of a dry winter season in 2010. However, it is too early to conclude how the overall season will perform. If Afghanistan doesn't receive enough snowfall by the end of winter season, irrigated crops will be negatively affected. Additional rainfall opportunities for the 2010 cropping season remain until May.

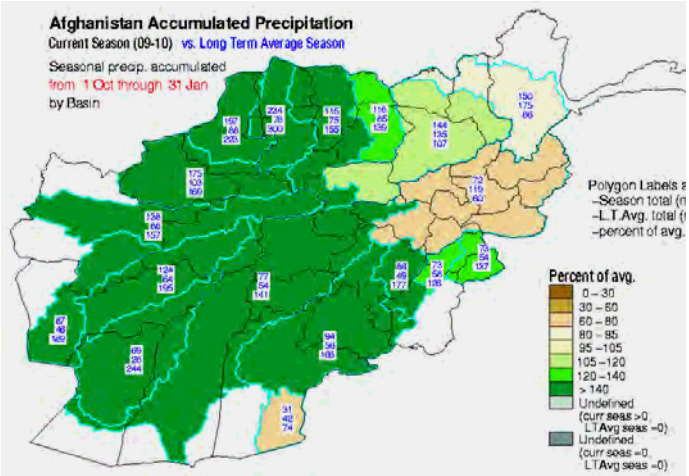
Roughly twice as much winter wheat seeds were made available for sowing than last years. Provided that precipitation is adequate, the increase in agricultural inputs will likely contribute to a good 2010 harvest.

In comparison to five-year average wheat market prices, December 2009 wheat market prices are lower in Hirat, Faizabad and Mazar reference markets. The high reduction in wheat market prices is pronounced in Hirat where wheat market prices are lower by 24 percent. While in Mazar and Faizabad, wheat prices are lower by six percent. On the other hand, December 2009 wheat market prices increased up 14 percent in Kabul, Kandahar reference markets against the five-year average wheat market prices.

In comparison to December 2008 wheat market prices, December 2009 wheat market prices decreased in all reference markets as average by 63 percent.

In comparison to November 2009, December 2009 wheat market prices decreased by 6 percent in all reference markets with the exception of Kabul and Maimana where wheat market prices increased by 5 and 1 percent respectively.

Figure 2: Accumulated Precipitation from October 1 to January 31, 2010



Source: *NOAA*

Most-likely food security scenario, January to June 2009

The most likely food security scenario for the January to June period is based on a number of assumptions. These include:

- Increases in food availability from the 2009 main cereal harvest and food aid distributions and improved food access by way of favorable terms-of-trade for pastoralists and casual laborers make for better food security conditions during the hunger season compared to the previous nine years.

- Typical winter trends caused by snow and cold weather will negatively impact household livelihood and food security throughout the country. Central and northeastern highland areas will be particularly vulnerable. Typical winter trends include: decrease labor opportunities, decrease milk production for pastoralists, poor access to rural markets and food price increases in rural markets.

- Accumulated winter snowpack in the highland areas, which is a strong determinant in seasonal crop performance, will be at or below the long-term average. Despite good snowpack early in the winter, there was a six week dry spell in December and January. Good seasonal precipitation performance for the remainder of the winter is crucial for the 2010 main cereal harvest.

- Late March will bring more livelihood options for households as labor opportunities, development and humanitarian assistance, and livestock production resume. Also in the spring, violence from the ongoing conflict is expected to increase during this time period and continue throughout the summer.

- Violence from the ongoing conflict will resume in the southern and southwestern provinces, and possibly other parts of the country.

Based on these assumptions, Afghanistan's food security condition in the next three months will likely worsen. This is mainly due to the hardships that winter brings those living in central and northeast highlands areas and other parts of the country. However, food insecurity is not expected to be at the level that it has been in recent years during the hunger season because of a good harvest, food aid coverage and favorable terms-of-trade.

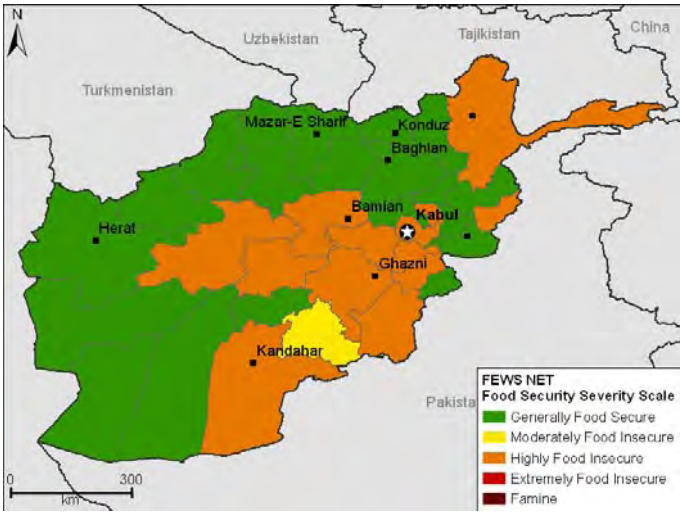
Day Kundi and Bamayan particularly will be highly food insecure. This is because provincial level wheat harvest where lower than provincial level food needs. Kabul will maintain moderately food insecure because of an inability for many households to access income. There appears to be more people engaged in coping such as begging. Assistance from USAID and WFP will alleviate some of the food insecurity.

As of late March, most households will be moving past the hardships of winter and be able to engage in their normal livelihood, labor opportunities will increase, and rural markets will be more accessible. Provided that the precipitation remains at a normal level, then the 2010 main cereal crop will likely be high due to excellent availability of seeds last fall. In the event that precipitation continues to be low then much of the country will face food insecurity, because of lower crop production, poor labor opportunities and poor pastures.

In the beginning of the 2009/2010 wet season (October and November) precipitation was above normal with the exception of northeast and eastern Afghanistan. However, during the months of December and January the areas of below normal precipitation increased from east to central highlands. December and January temperatures remained above normal in parts of the countries, which caused early snowmelt. Snow cover and snow depth are less than normal. Nevertheless, there is still one-month opportunity for additional snowfall and there is sufficient time till May for rainfall.

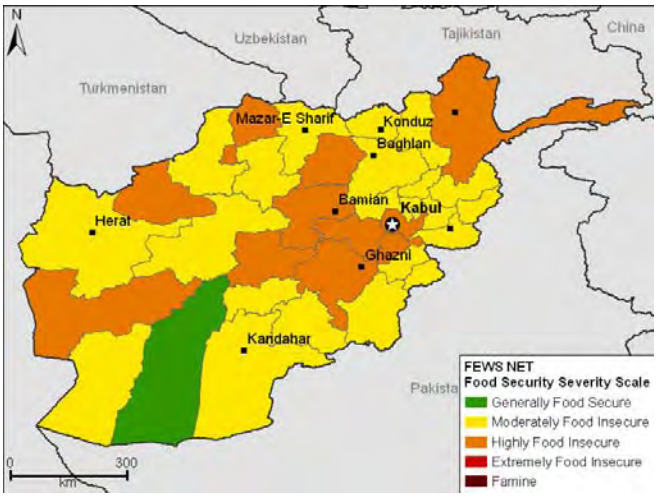
In anticipation of a dryer season, food market prices will increase, traders will hoard food items. Pastoralist and agro-pastoralists will have deteriorating terms of trade because livestock conditions and prices will worsen. National cereal production will be significantly reduced and the need for food imports will increase.

Figure 3: Most-likely food security scenario, January to March 2010



Source: *FEWS NET*

Figure 4: Most-likely food security scenario, April to June 2010



Source: *FEWS NET*

For more information on FEWS NET's Food Insecurity Severity Scale, see www.fews.net/FoodInsecurityScale

Violence from the ongoing conflict in the south is expected to increase during the spring. An increase in violence will likely displace more households. The number of IDPs is unknown and there have been reports of some spontaneous IDP settlements not receiving assistance yet. These groups are highly food insecure. A rise in violence will make the southern provinces highly food insecure because of agricultural production will decrease, market supply and access will be limited, households will likely loss assets or be displaced. More assistance will need to be delivered to those who are displaced.

Table 1. Events which could change the most-likely food security scenario

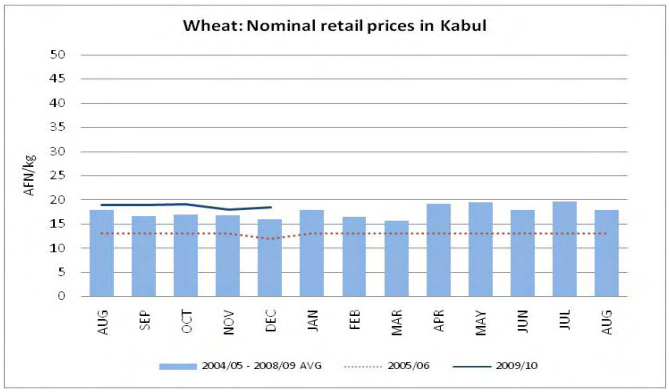
Geographic Focus Area	Possible events in the next 6 months that would change the most likely scenario in this area	Impacts on food security conditions	Likelihood of occurrence*	Key variables to monitor
Central & northeast highlands, south and southwest, and Kabul city	Normal or above normal precipitation during winter time	Another good harvest providing a good amount of food and income for the 2010/2011 consumption year.	Unlikely	Winter precipitation, cumulative snow pack and temperature.
South and Southwest	Less conflict in southern parts of Afghanistan	Households can rebuild their livelihoods.	Very Unlikely	UNAMA Humanitarian updates

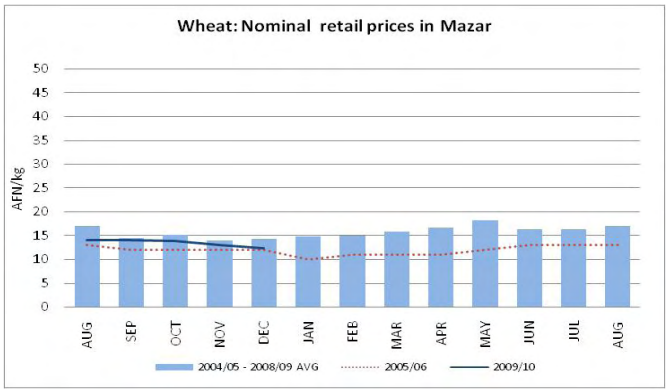
Probability levels	Description
Unlikely	Could occur in the time period if conditions changed moderately
Very unlikely	Could occur in the time period if conditions changed significantly

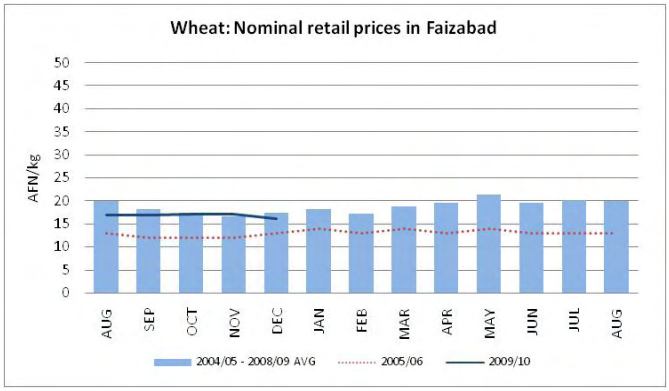
AFGHANISTAN Monthly Price Bulletin January 2010

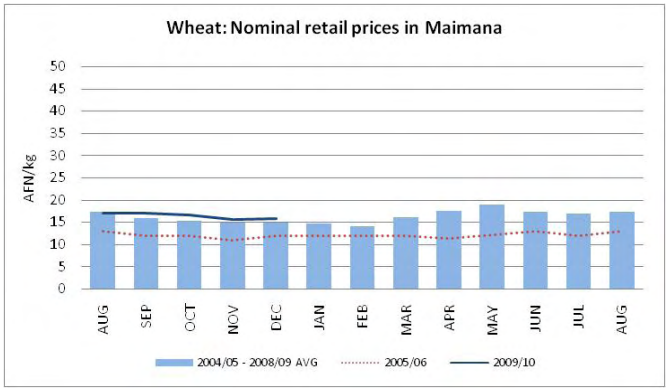
Monthly prices for Afghanistan are supplied by WFP VAM and the Ministry of Agriculture, Irrigation, and Livestock.

Wheat is the staple food for most Afghans, comprising more than 70 percent of their diet. Low-quality rice is a poor, but sometimes necessary, substitute. All markets represent significant population centers and consumer markets. Kabul, the capital, supplies the central provinces and is a transit point between the north, south, east, and west. Jalalabad supplies the eastern part of the country and acts as a cross-border market with Pakistan. Mazar-e-Sarif supplies northern provinces and, in a good year, the southern provinces as well. Faizabad supplies the chronically food insecure northeast region. Maimana market supplies the drought-prone northwest region. Hirat supplies the west. Kandahar supplies the southwestern part of the country where drought, civil insecurity, and war often hinder market activity.





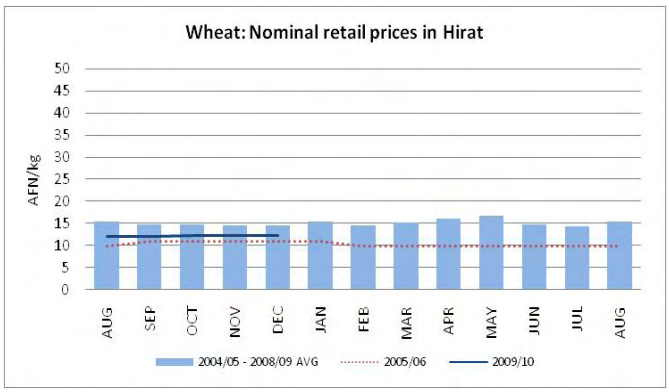


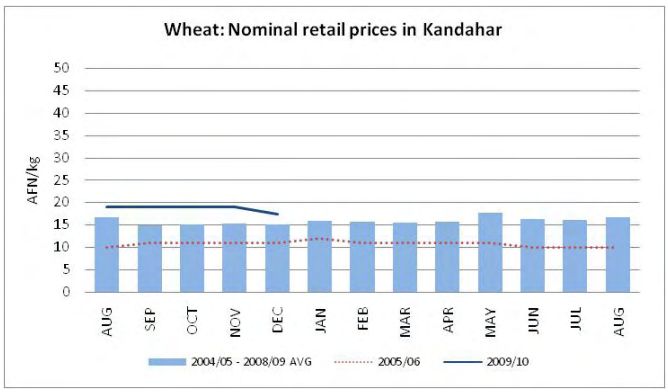


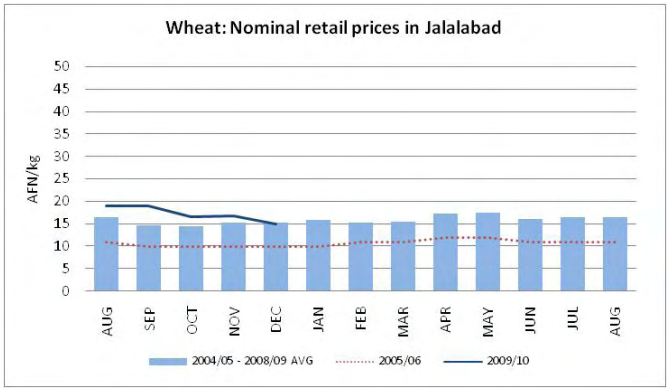
FEWS NET Afghanistan
fnajimi@fews.net

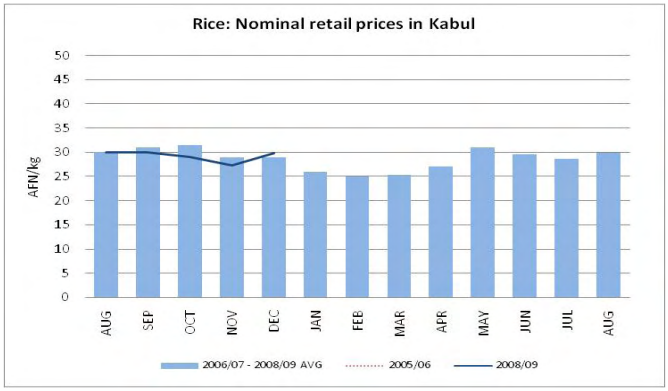
FEWS NET Washington
1717 H St NW
Washington DC 20006
info@fews.net

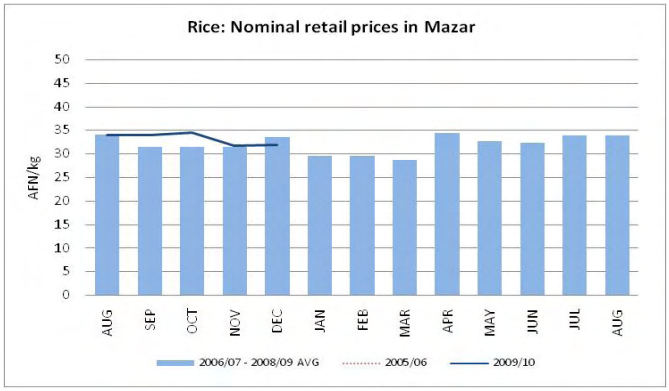
FEWS NET is a USAID-funded activity. The authors' views expressed in this publication do not necessarily reflect the view of the United States Agency for International Development or the United States Government.

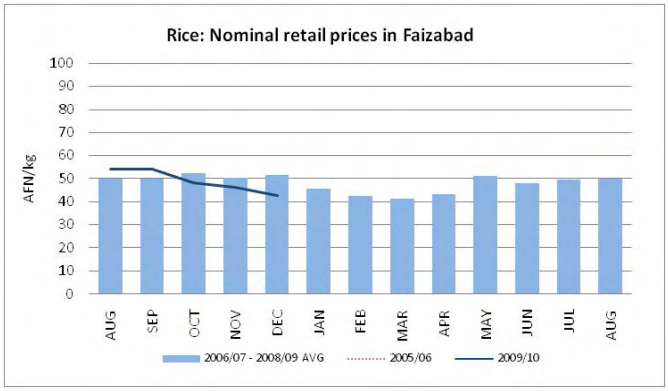

Wheat: Nominal retail prices in Hirat
AFN/kg
50
45
40
35
30
25
20
15
10
5
0
AUG SEP OCT NOV DEC JAN FEB MAR APR MAY JUN JUL AUG
2004/05 - 2008/09 AVG
2005/06
2009/10

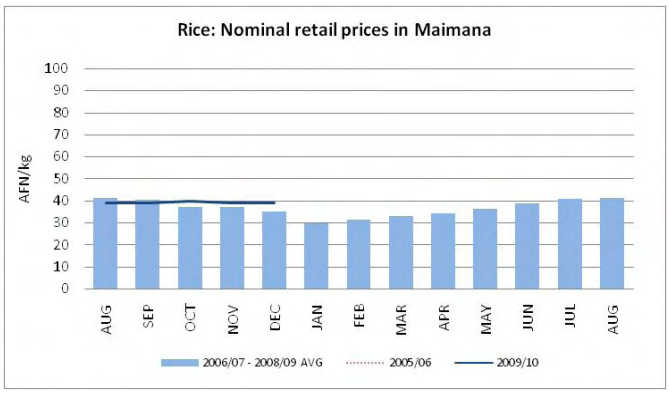

Wheat: Nominal retail prices in Kandahar
AFN/kg
50
45
40
35
30
25
20
15
10
5
0
AUG SEP OCT NOV DEC JAN FEB MAR APR MAY JUN JUL AUG
2004/05 - 2008/09 AVG
2005/06
2009/10

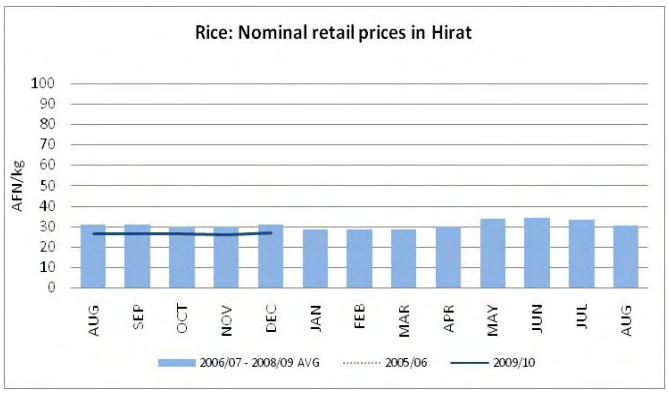

Wheat: Nominal retail prices in Jalalabad
AFN/kg
50
45
40
35
30
25
20
15
10
5
0
AUG SEP OCT NOV DEC JAN FEB MAR APR MAY JUN JUL AUG
2004/05 - 2008/09 AVG
2005/06
2009/10

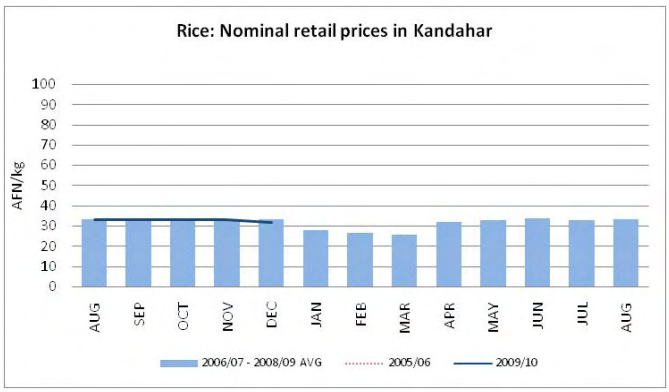

Rice: Nominal retail prices in Kabul
AFN/kg
50
45
40
35
30
25
20
15
10
5
0
AUG SEP OCT NOV DEC JAN FEB MAR APR MAY JUN JUL AUG
2006/07 - 2008/09 AVG
2005/06
2008/09

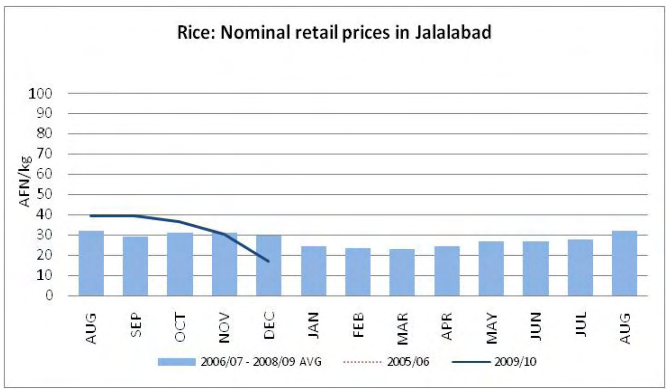

Rice: Nominal retail prices in Mazar
AFN/kg
50
45
40
35
30
25
20
15
10
5
0
AUG SEP OCT NOV DEC JAN FEB MAR APR MAY JUN JUL AUG
2006/07 - 2008/09 AVG
2005/06
2009/10


Rice: Nominal retail prices in Faizabad
AFN/kg
100
90
80
70
60
50
40
30
20
10
0
AUG SEP OCT NOV DEC JAN FEB MAR APR MAY JUN JUL AUG
2006/07 - 2008/09 AVG
2005/06
2009/10


Rice: Nominal retail prices in Maimana
AFN/kg
100
90
80
70
60
50
40
30
20
10
0
AUG SEP OCT NOV DEC JAN FEB MAR APR MAY JUN JUL AUG
2006/07 - 2008/09 AVG
2005/06
2009/10


Rice: Nominal retail prices in Hirat
AFN/kg
100
90
80
70
60
50
40
30
20
10
0
AUG SEP OCT NOV DEC JAN FEB MAR APR MAY JUN JUL AUG
2006/07 - 2008/09 AVG
2005/06
2009/10


Rice: Nominal retail prices in Kandahar
AFN/kg
100
90
80
70
60
50
40
30
20
10
0
AUG
SEP
OCT
NOV
DEC
JAN
FEB
MAR
APR
MAY
JUN
JUL
AUG
2006/07 - 2008/09 AVG
2005/06
2009/10


Rice: Nominal retail prices in Jalalabad
AFN/kg
100
90
80
70
60
50
40
30
20
10
0
AUG
SEP
OCT
NOV
DEC
JAN
FEB
MAR
APR
MAY
JUN
JUL
AUG
2006/07 - 2008/09 AVG
2005/06
2009/10