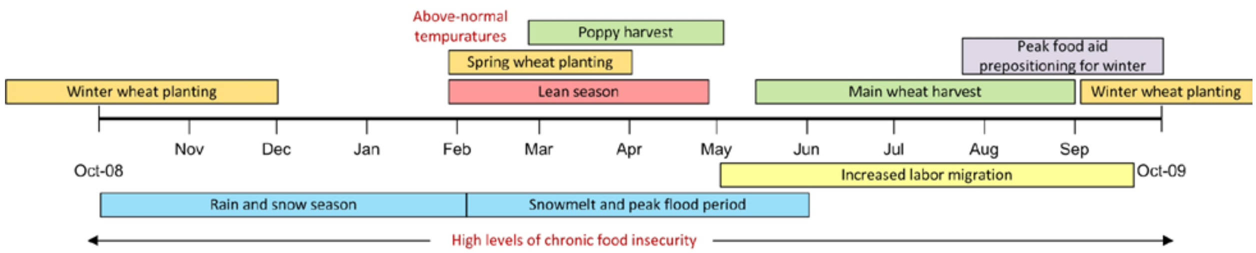
Seasonal calendar and critical events



Weather hazards

- *Precipitation:* Rainfall during the third 10 days of March was significantly better than the same period of 2008, and covered important rain-fed agricultural areas in the north and northwest that have been deficient of moisture during some parts of this season. March and April rain is vital for rainfed agriculture and pasture. More rain is expected in the coming week. Rainfall estimation products and modeling generally agree that rains since October 2008 have been better than the same period of 2007/08, especially in the north and east, with lesser amounts, and perhaps below-average rains, in the west and southwest. However, there remains some debate on how rainfall in this agricultural season compares to long-term averages, and to what extent total wheat production depends on rainfall versus irrigation and winter versus spring planting. These differences continue to be evaluated, and are tending toward convergence as the harvest approaches.
- *Temperature:* As of late January, colder-than-normal temperatures reversed course and began steeply rising across most of the lowland areas of the country, as they have over recent years. This trend could be problematic for food security, principally in *terms of its* effects on the rate of snowmelt and the subsequent implication for water availability.
- *Snowpack/irrigation reserves:* There is consensus among different monitoring products that the extent of the snowpack is less than in 2008/09. However, information on the depth of the snowpack is less clear, and related to the precipitation estimation problem described above. Current snow depletion curves indicate that snow is melting more slowly than the recent 2001-08 average across Afghanistan, although in some areas the speed of the snow melt is above the long term mean (1966-2001).

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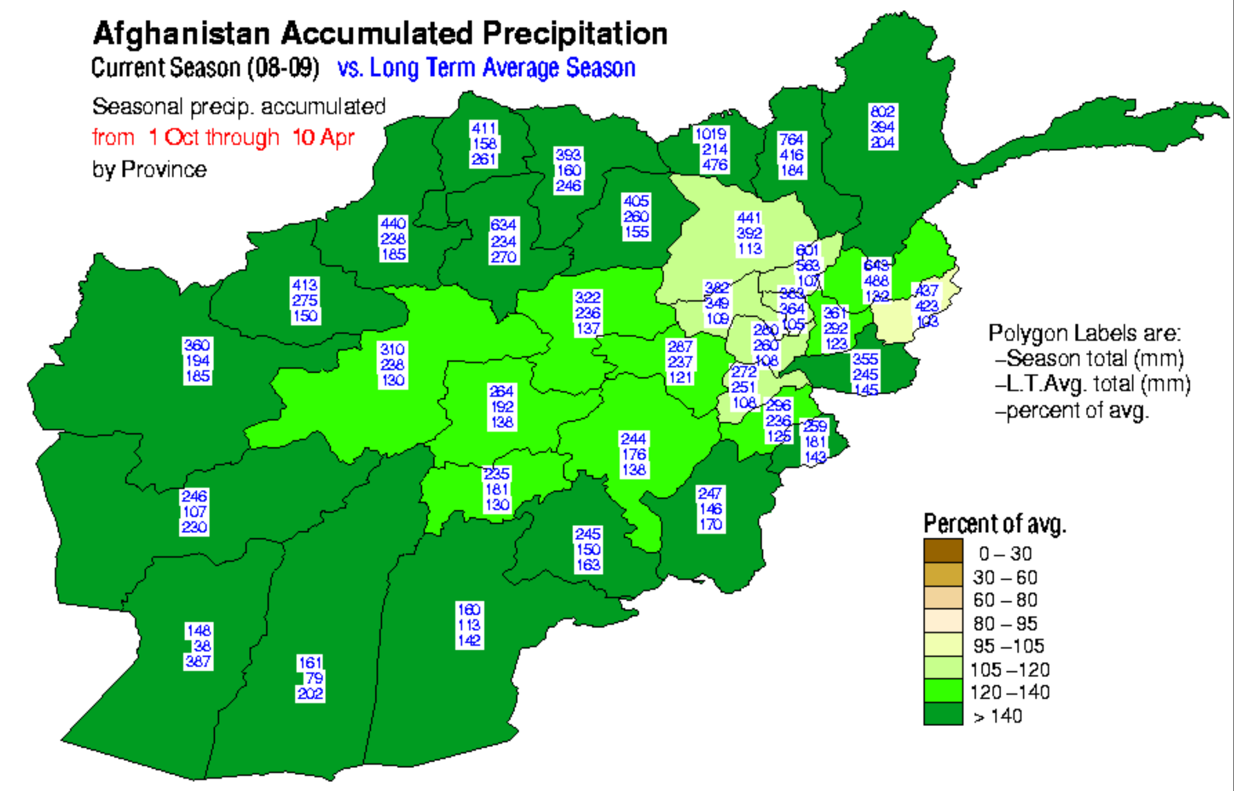
Figure 1. Accumulated precipitation vs. long-term average



Source: USGS

Crop condition/harvest forecasts

- *Crop conditions*: Winter wheat is now in the tillering stage at higher elevations, while in lower elevations it is in the heading stage. Generally, wheat plantings are facing heavy competition from weeds across the country, particularly in Kunar and Nangarhar provinces. In Baglan province, farmers are facing wheat worms and central parts of Farah province saw 10-15 percent of its wheat uprooted by heavy storms. To date, the availability of irrigation water has not been reported as problematic, except in some districts of Kandahar and Jawzjan provinces. The winter wheat area planted has increased compared to the previous year, but the degree to which farmers are shifting planting patterns from winter to spring due to irrigation supply constraints is unknown. The major hazard of concern at this point is the potential for early snowmelt, which could have a significant impact on both winter and spring-planted crops this season, as it has in recent years.
- *Most likely harvest scenario*: March precipitation suggests favorable climate conditions for agriculture, particularly for rainfed agriculture, although, as discussed above, there remains some debate about total rainfall, particularly in the north. Irrigated wheat prospects appear to be much improved compared to last year's drought-affected crop, although there is less certainty in the north. A study is underway to evaluate this issue. An additional feature that will be considered is the extent of increases in wheat plantings due to wheat prices and the availability of agricultural inputs, some of them from Government-assisted programs.

In-country wheat pricing trends

- *Current internal wheat price trends*: Food prices have been declining in Afghanistan since October 2008, with wheat prices dropping by 19 percent, although prices remain above-average in almost all monitored markets. The arrival of the harvest season in Afghanistan (June), and in the region more broadly, in combination with potential food imports from India, will likely push down wheat prices even further over the next six months.

Regional wheat availability, import expectations

- *Regional harvest forecasts:* According to the USDA's Global Agriculture Information Network March report, 2009 wheat production in Pakistan is forecast at 24 million MT, nearly 12 percent higher than last year. The increase in wheat production is a result of favorable climatic conditions and an increase in the Pakistani government's procurement prices, which have motivated farmers to grow more. Pakistan's domestic wheat needs are 22 million MT and the remaining portion is likely to be exported into neighboring countries, mainly Afghanistan. It is very possible that old Pakistani wheat stocks, some of which may include inferior grain, will be the first exported to Afghanistan. The forecast for the Pakistan harvest has positive implications for Afghan food security, with wheat prices likely to decrease following the imports, especially if Afghanistan also produces as much as an average harvest.
- Pakistani rice production in 2009 is forecast to be 6.2 million MT, slightly lower than in 2008 (6.3 million MT), and its exports are forecast at 4 million MT in 2009, also slightly lower than in 2008 (4.2 million MT). Reduced rice exports are largely due to lower rice prices on international markets. This may be a positive feature of future food security in Afghanistan, where rice is typically a lower-cost substitute for wheat flour.
- The Kazakhstan agriculture ministry has forecast an optimistic harvest in 2009, suggesting that the Kazakh government can supply the same amount of wheat exports (6 million MT) as in 2008.

Scenarios: Afghanistan food security outlook

- *Key areas to watch for most severe acute food insecurity*: Jawand and Bala-Murghab districts of Badghis provinces, Taywar and Passwand districts of Ghor province, and northern districts of Badakhshan province need to be watched closely, since they received limited assistance in 2008, due to logistical and civil insecurity problems. Nevertheless, cash-for-work programs, animal feed, and food aid provided by ACTED, Solidarities, AREA, ICRC, and Afghan-AID are expected to increase access to food in these areas.
- *Key information gaps to fill*: Precipitation amounts across the country, and how they compare to the average. Crop diseases, especially wheat rust, and competition from weeds that can threaten food security, even if a good harvest is forecast.
- *Most likely post-harvest food security scenario*: Taking into consideration all factors, even with the recent uncertainties about the actual amount of rainfall, we assume that food security conditions will be better than in 2008, after the harvest.
- *Most likely food aid implications for most likely scenario*: It is too early to determine how the current conditions may indicate the need for food aid. However, the arrival of 250,000 MT of wheat, donated by India, will strengthen the strategic grains reserve, thus improving the potential for emergency response and the control of wheat prices. The WFP food pipeline is secure through November 2009.

Sources of information consulted: 1) FEWS NET Monthly Update, February 2009; 2) USDA/FAS/Office of Global Analysis Gain Report, February 25, 2009; 3) USGS January 2009 Agromet report; 4) FEWS NET Price Watch, February 2009; 5) USGS/FEWS NET weather and crop monitoring products, March 2009, http://earlywarning.usgs.gov/afghan/; and 6) NOAA/FEWS NET weather monitoring products, March 2009, http://www.cpc.ncep.noaa.gov/products/fews/AFGHANISTAN/.