



World Food
Programme

AFGHANISTAN FOOD SECURITY UPDATE

3rd Quarter September 2023

CHAPTER 01

The data presented in this chapter reference WFP's market monitoring and the World Bank's economic monitor



Inflation

Foreign Exchange

Market Prices Update

Afghanistan

Economic Overview

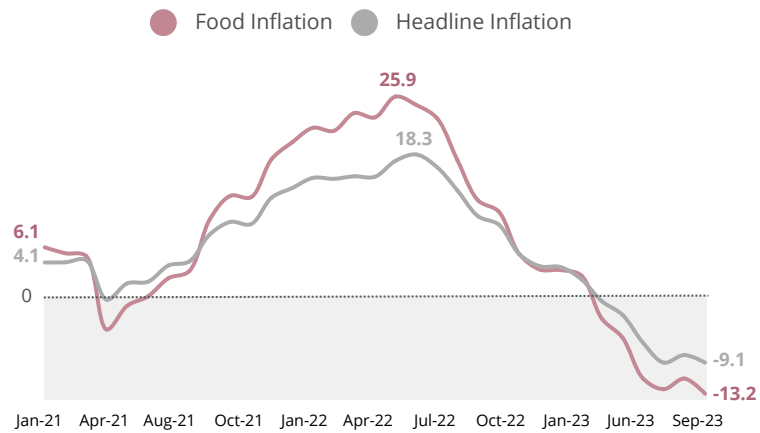
Headline and food inflation have been in decline over the past year

Since April 2023, a persistent deflationary trend has been evident, marked by dwindling household savings, reduced public spending, and adverse impacts on farmer incomes due to bans on opium cultivation.¹ This downturn in inflation rate can also be attributed to a combination of decreasing domestic prices for key food commodities as a result of global price trends, as well as the stability of the Afghani (AFN) throughout the past year.

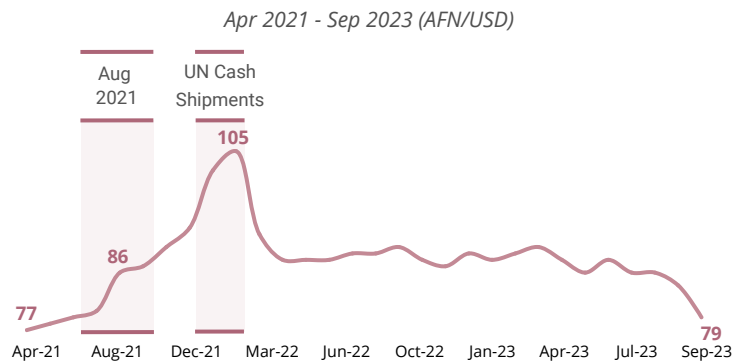
The AFN has remained stable against the USD since March 2022

The AFN has consistently maintained its stability against the USD since March 2022. There has been a significant appreciation between January and March 2022, primarily due to United Nations cash shipments and measures taken by the de facto authorities to control illicit foreign currency exports.

Change in Food and Headline Inflation²



Change in Exchange Rate³



1. World Bank, Monthly Economic Monitor, October 2023

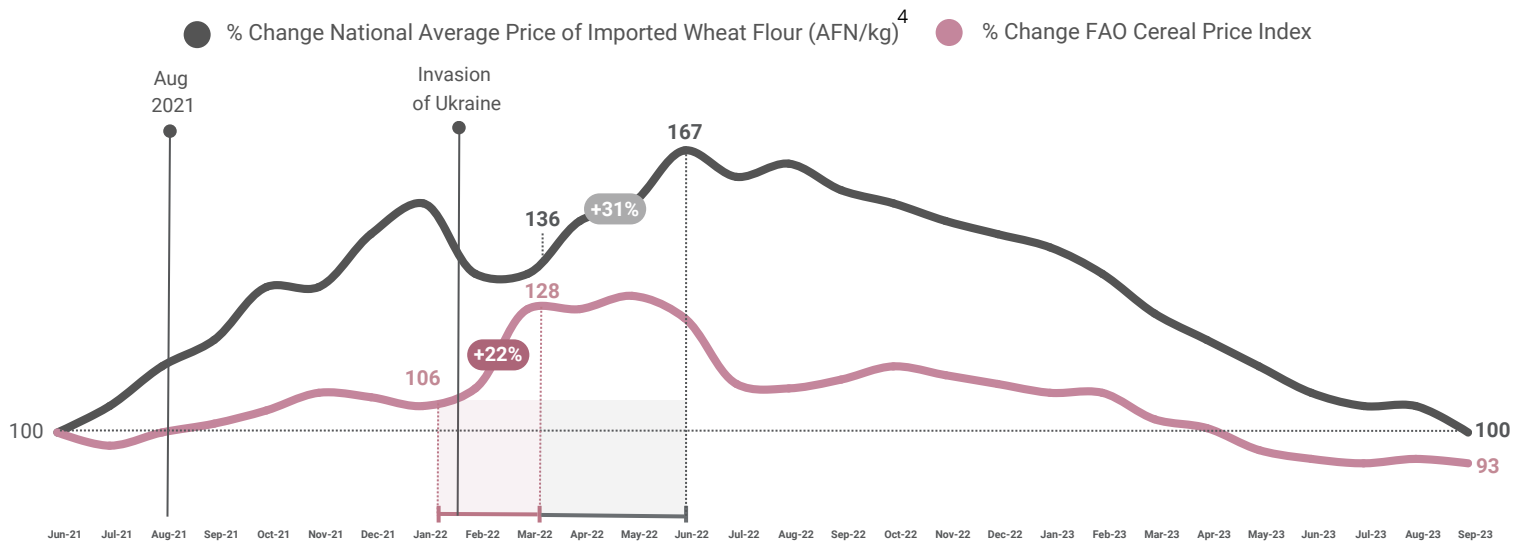
2. WFP, Data viz, September 2023

3. WFP, Afghanistan Monthly Market Monitoring, September 2023

Afghanistan

Market Prices Update

A Steady, 1-year Decline in Staple Food Prices



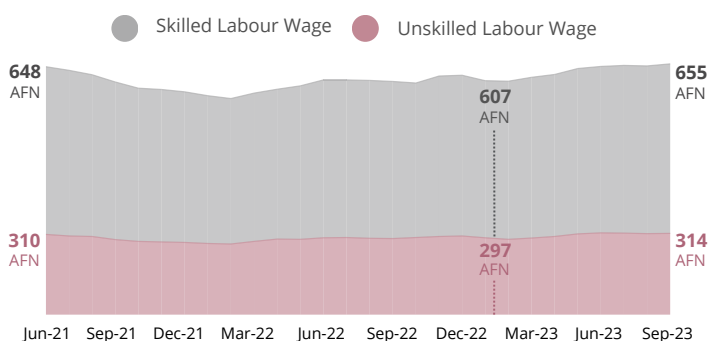
DATA SOURCE : WFP Market Monitoring

NOTE : June 2021 = 100

In Afghanistan, there has been a consistent decline in the national average prices of imported wheat flour since its peak in June 2022. Presently, prices have stabilized to levels comparable to those observed in June 2021, at 33 AFN per kilogram.

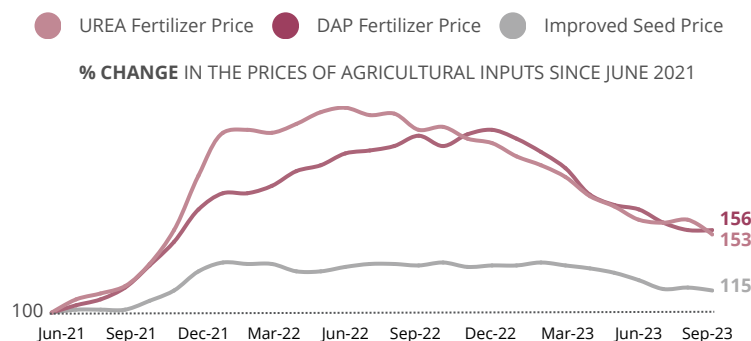
This price stability can be partially attributed to the year-long declining trend in global cereal prices, combined with the completion of recent harvests within the country and favorable production in Kazakhstan, ensuring a steady supply of imported wheat flour.⁵

Skilled and unskilled labour wages have stagnated over the past two years



Since January 2023, skilled and unskilled labour wages have seen a modest increase, coinciding with heightened demand in the labor market during the harvest season. Despite these increments, wage growth has remained stagnant for the past two years. Such stagnation and the undervaluation of wages are placing a strain on households, particularly those with limited employment opportunities.

Prices of agricultural inputs remained significantly higher than the two-year average



The domestic prices for DAP and UREA fertilizers have eased from their June 2022 peaks but they remain at significantly elevated levels due to the prolonged impact of the war in Ukraine and China's trade restrictions. As of September 2023, the domestic prices of DAP and UREA fertilizer were 56 and 53 percentage points higher, respectively, compared to June 2021, significantly burdening smallholders in Afghanistan.

4. The domestic wheat flour (imported) refers to wheat flour originating from foreign countries, but distributed and consumed within Afghan national boundaries.

5. FEWS NET. Afghanistan Key Message Update September 2023: Above-average 2023/24 precipitation season is expected to facilitate planting, 2023.

The data presented in this chapter are collected via mobile surveys



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Restrictions against Women Working
Food Consumption
Coping Strategies
Access to Market and Healthcare

Background and Methodology

WFP has been conducting monthly telephone surveys across all 34 provinces of Afghanistan for over 2.5 years to gain a better understanding of the food security situation and its underlying factors. Starting from 2023, the reporting frequency has transitioned to a quarterly basis, and this specific report presents data collected in September 2023.

The methodology has remained consistent throughout the survey rounds, with a few minor adjustments. Since August 21, 2021, panel surveys have been conducted for 80 percent of the respondents in each round. The results are weighted to ensure geographic and socio-demographic representativeness. It is important to note that due to the nature of this survey being conducted through mobile phones, the results may have an upward bias on key outcomes, as households with cell phone ownership are more likely to be better off.

Sample population at a glance:
MOST RECENT MONTH (SEPTEMBER 2023)

1,504 households surveyed



Male-headed households: 95%
Female-headed households: 5%



Average household size:
10.7 members



Urban households: 48%
Rural households: 52%



Households reporting having
a member/s with a disability: 18%

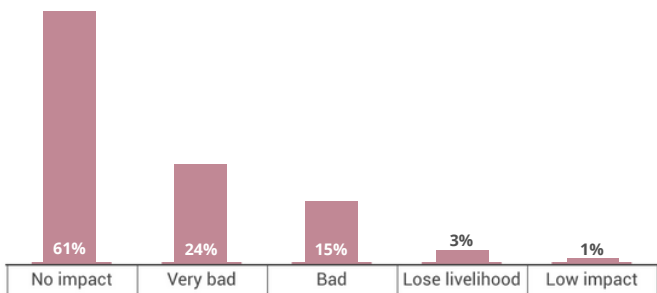
6. The data are weighted to ensure geographic representativeness with 9 regions (Central Highland, East, Hirat, Kabul, North, North East, South, South East and West)



Restrictions against Women Working

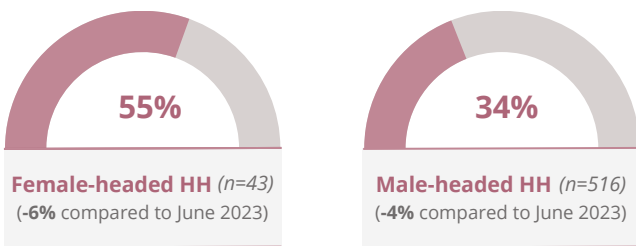
Over one-third of households have been adversely affected by restrictions against women working

SEPTEMBER 2023



% of households experiencing a negative impact of restrictions on women working

FEMALE VS MALE-HEADED HOUSEHOLDS



*With limited sample size for female-headed households, the above findings are only indicative.

De-facto authorities have imposed restrictions on Afghan women, including banning them from most areas of public life, higher education and employment, since taking control of Afghanistan in August 2021. The restrictions were then extended to prevent Afghan women from working at non-governmental organizations and United Nations in 2023.

In a survey assessing the restrictions' impact on women's employment and economic participation,⁷ 42% of respondents indicated negative consequences, including the loss of primary income sources.

Female-headed households face disproportionate impact of the restrictions

These restrictions have had a particularly severe effect on female-headed households. More than half of such households have reported experiencing a negative impact (ranging from very bad to bad) due to these constraints. This is in contrast to male-headed households, where 34 percent have reported negative impact.

7. Refers to impact of restrictions against women from work, irrespective of sector



Food Consumption



of people in Afghanistan face inadequate food consumption⁸

Hunger levels have remained critically high throughout this year

Despite a slight improvement in food consumption during the recent harvest season and an overall declining trend in cereal prices, the situation remains dire. The households with poor food consumption, which had marginally decreased to 48 percent in June 2023, reverted again to 53 percent by September 2023.

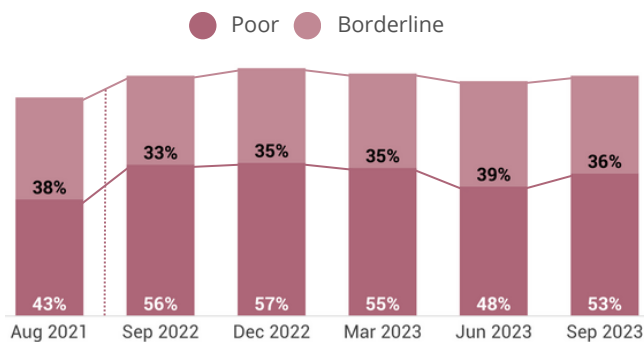
Female-headed households are disproportionately affected by adverse food consumption outcomes

As of September 2023, 67 percent of female-headed households are experiencing poor food consumption, in contrast to 52 percent of male-headed households. This disparity has widened since the previous survey conducted in June 2023.

Households with Person with Disabilities (PwDs) remain disproportionately impacted

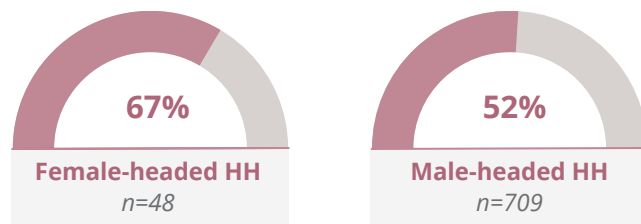
Households with PwDs are more likely to experience poor food consumption, with 64 percent having poor food consumption compared to 50 percent of households without PwDs.

Food Consumption Group

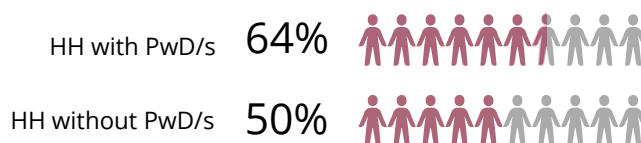


Proportion of Poor Food Consumption by Gender of Household Head⁹

FEMALE VS MALE-HEADED HOUSEHOLDS



Proportion of Poor Food Consumption by Household with PwDs



8. Based on the Food Consumption Score indicator which is calculated according to the types of foods consumed during the previous 7 days, the frequencies with which they are consumed and the relative nutritional weight of the different food groups. Inadequate food consumption refers to the households classified with Borderline or Poor food consumption.

9. With limited sample size for female-headed households, the above findings are only indicative.



Consumption-based Coping Strategies

Households continue to resort to drastic measures to meet immediate food needs

In September 2023, 43 percent of households resorted to high coping strategies under the consumption-based coping strategies scheme, remaining at a level similar from the previous survey in June 2023. Compared to the same period last year, there was a 6 percentage point decrease in the proportion with high coping strategies.

While there has been a decline in the proportion of households with high coping strategies over the first quarter of this year, dropping from 57 percent in January to 36 percent in April 2023, it again has reverted to 43 percent by September 2023.

This reversal coincides with a deterioration in food consumption during the third quarter of this year. Specifically, the prevalence of poor food consumption worsened, increasing from 48 percent in June 2023 to 53 percent in September 2023. This trend indicates that households remain insufficient to adequately address their immediate food requirements while compromising on food quality, reducing both the size and frequency of meals.

Consumption-based Coping Strategies

ONE YEAR COMPARISON

September 2022 VS September 2023

Proportion of households which have used the following strategies at least once in the past seven days



Rely on less preferred and less expensive food

87% (-3% compared to September 2022)



Borrow food or rely on help from a relative or friend

76% (+1% compared to September 2022)



Reduce the number of meals eaten in a day

41% (+2% compared to September 2022)



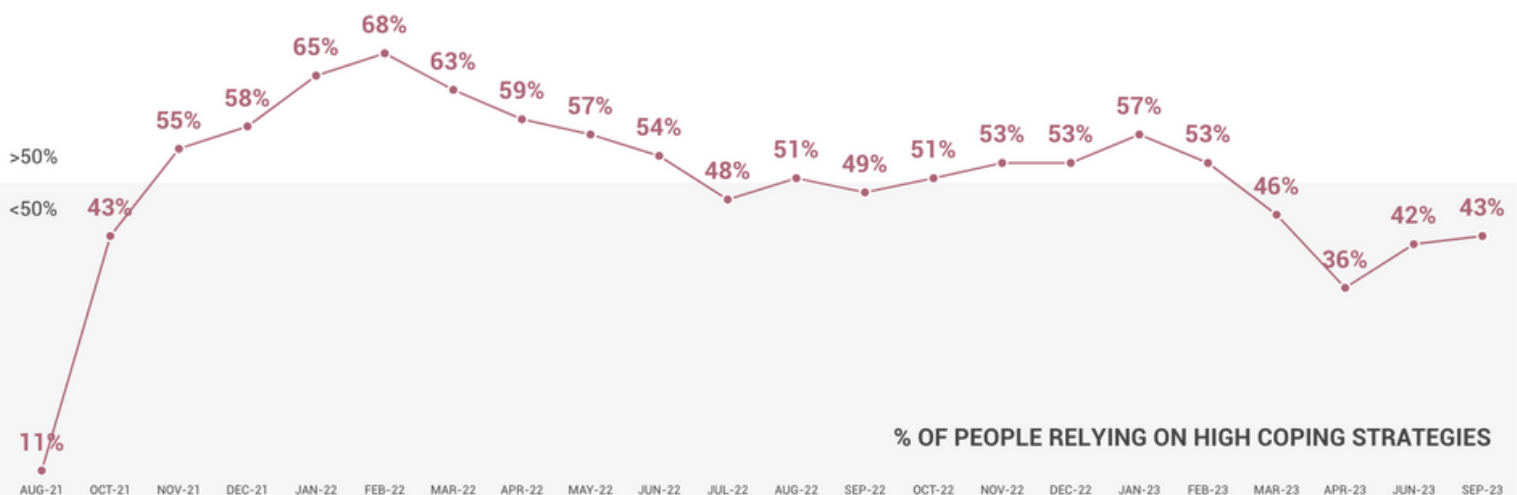
Limit portion size of meals at meal times

60% (-13% compared to September 2022)



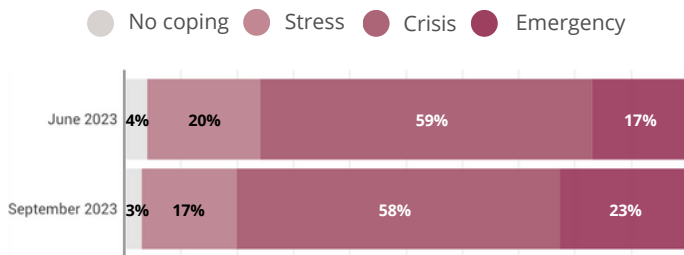
Restrict adult consumption so small children can eat

61% (-1% compared to September 2022)



Livelihood Coping Strategies

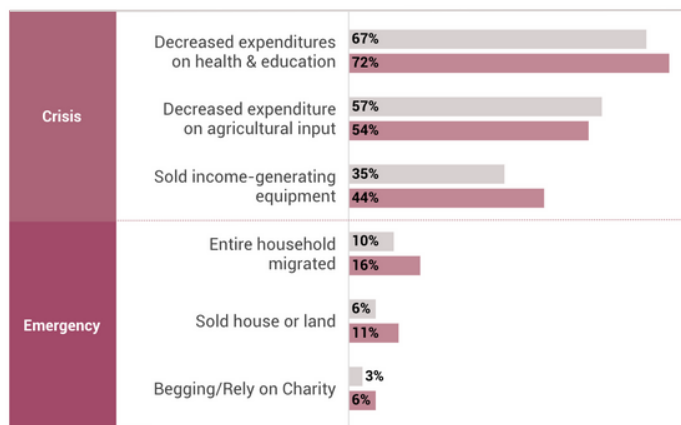
Livelihood Coping Strategies¹⁰



QUARTERLY COMPARISON

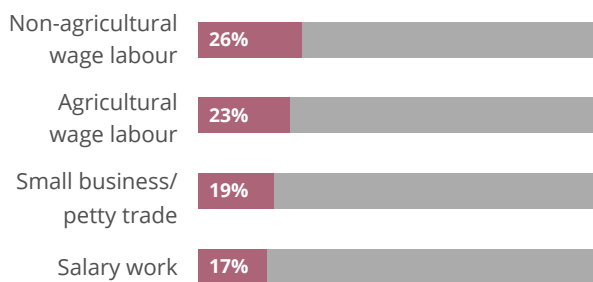
● June 2023 ● September 2023

Proportion of households which have used the following strategies at least once in the 30 days



Proportion with Emergency Coping Strategies

BY PRIMARY INCOME SOURCE (%)



10. The livelihood-based coping strategy index is designed to measure the extent of livelihood coping households need to utilise as a response to lack of food or money to purchase food during the 30 days prior to the survey. This includes mid-term changes in income-earning or food production patterns, as well as their actions such as asset sales due to food scarcity.

About one-fourth of households are resorting to emergency coping strategies

The proportion of households resorting to emergency coping strategies increased from 17 percent in June 2023 to 23 percent in September 2023. This rise may be linked to the end of the harvest season and the consequent reduction in seasonal labor opportunities, necessitating the search for new livelihoods during the winter.

People are increasingly selling their income-generating assets

According to the most recent survey from September 2023, there was a significant 9 percentage point increase in the number of households selling their income-generating assets compared to June 2023. Moreover, there's an emerging trend of entire households migrating, especially in the Eastern region.

This shift could indicate that, in response to both internal and external shocks, households in the Eastern region are increasingly moving towards urban areas as winter approaches. Factors such as limited working opportunities and land ownership could be driving this migration.

The prevalence of emergency coping varies by income source

Households reliant on non-agricultural wage labor are more likely to use emergency coping strategies, with 25 percent experiencing it. Conversely, households with salaried employment demonstrate a relatively lower prevalence of emergency coping, which is a 9 percentage point lower than those with non-agricultural wage labour.

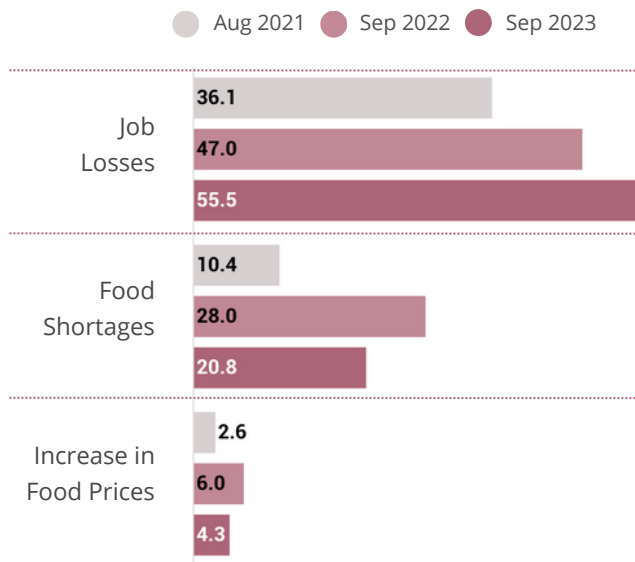
Stress coping indicates a reduced ability to deal with future shocks due to a current reduction in resources or increase in debts. Crisis coping directly reduces future productivity, including human capital formation. Emergency coping affects future productivity but are more difficult to reverse or more dramatic in nature.



Concerns and Access

Top Concerns

% CITING THE TOP CONCERN



An increasing number of people are concerning about job losses

As the prices of global and domestic food commodities have declined over the past year, the level of household concern about price increases has remained at minimal level. However, due to the persistent deflation trend over this year, concerns about job losses have risen.

Furthermore, the data from WFP's market monitoring indicates that the average working days for casual labour per week were only 2.5 days in September 2023, stagnating from 2.1 days since August 2021. This suggests that despite reduced anxiety over food prices, limited working opportunities and purchasing power continue to strain household finances.

Market Access



21% (+3% compared to June 2023)

of households facing difficulties in accessing market

One in five households is facing difficulties in purchasing basic needs

Lack of money have been reported as a major reason preventing accessing markets at 80 percent, which is a 4 percentage point decrease from June 2023.

Health Access



35% (+1% compared to June 2023)

of households facing difficulties in accessing health care

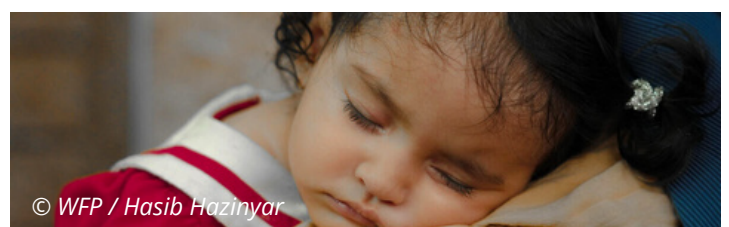
Over one-third of households has trouble accessing and/or receiving health care

The vast majority of households (81 percent) cited lack of money as a major reason for having difficulties in accessing health care, followed by far distance to hospital (9 percent).

This report updates Afghanistan's food security situation based on 22 rounds of data collection via telephone surveys across 34 provinces. Since August 2021, panel surveys are conducted for 80 percent of respondents in each round. Results are weighted to ensure socio-demographic representativity.

WFP Response:

WFP is working to meet the food and nutrition needs of millions of people in Afghanistan. In 2023, WFP requires US\$2.2 billion to deliver emergency food, nutrition, and livelihood support to those in need.



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