



AFGHANISTAN FOOD SECURITY UPDATE

4th Quarter December 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

Labour Market Update

Afghanistan Economic Overview

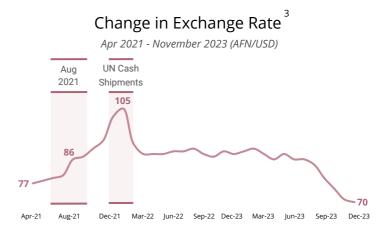
Inflation remained negative amid sustained economic weakness and depressed demand

Since April 2023, a persistent deflationary trend has been evident, marked by dwindling household savings, reduced public spending, increased unemployment, and adverse impacts on farmer incomes due to bans on opium cultivation. A reduction in international aid and restrictive policies on women and girls pose risks to Afghanistan's recovery. Additionally, concerns about the banking sector's functionality and challenges with the payment system remained significant.¹

The Afghani has demonstrated appreciation against the USD since March 2022

The AFN has consistently maintained its stability against the USD since March 2022. This stability can be attributed to the continued effects of United Nations cash shipments and the central bank's auctions for USD. As a result of these measures and a resultant monetary contraction, the AFN appreciated against major currencies throughout the year.

Change in Food and Headline Inflation Food Inflation Headline Inflation 25.9 18.3 -9.1 -14.0 Jan-21 Apr-21 Aug-21 Oct-21 Jan-22 Apr-22 Jul-22 Oct-22 Jan-23 Apr-23 Jul-23 Sep-23 Nov-23

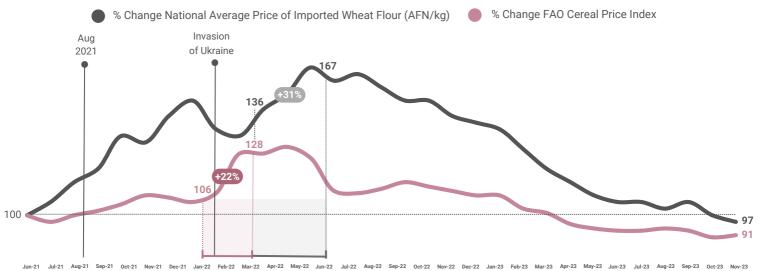




Afghanistan

Market Prices Update





DATA SOURCE: WFP Market Monitoring **NOTE**: June 2021 = 100

In Afghanistan, there has been a steady decrease in the national average prices of imported wheat flour, following its peak in June 2022. Currently, these prices have dropped even lower than those observed in June 2021, with the cost now standing at 32 AFN per kilogram.

The stabilization of national cereal prices is likely due to a confluence of factors, including the ongoing downward trend in global cereal prices and the positive outcomes of local harvests. Additionally, favorable production in Kazakhstan, historically a main exporter of wheat flour to Afghanistan, has contributed to this stability.

The WFP Food Basket prices have declined over the year

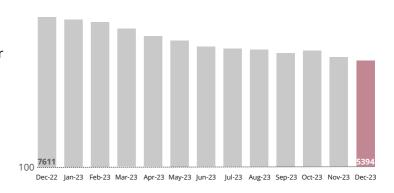
The WFP food basket average cost in December decreased to 5,394 AFN, marking a 29 percentage point reduction compared to the same period last year and a 7 percentage point reduction compared to the last quarter. Despite the earthquake in Herat, the WFP food basket prices in Herat continued their downward trend, falling from 5,521 AFN in the pre-earthquake period (September 2023) to 4,946 AFN in the postearthquake period (December 2023).

There has been a modest rise in the winter essential prices due to seasonal demand

In December 2023, the monthly average prices of winter essentials, commonly used as fuel in heating appliances, saw a slight uptick from the previous month, aligning with increased usage during the winter season. Specifically, the prices of pine wood and baloot wood rose by 4 percent and 10 percent, respectively, compared to the previous month.

Change in the WFP food basket prices

December 2022 - December 2023 (AFN)



Change in the winter essential prices, used as fuel in heating appliances

% Change Comparison between November and December 2023 (AFN/Kg)



Afghanistan Labour Market Update

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. While skilled labor wages showed a slight increase compared to the same period last year, unskilled labor wages remained stagnant for the past two years.

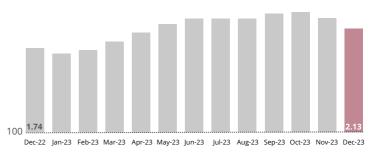
In December, precipitation deficits have increased, stemming from a delayed start to the wet season⁴

Contrary to expectations of above-average precipitation, the 2023/2024 season has recorded lower than average rainfall, with the onset of the wet season delayed by as much as ten weeks. Between October and December, the north and northeast regions experienced increasing precipitation deficits, marking historically low levels of rainfall.

This delay in precipitation has pushed the continuation of planting activities in these areas into January. Moreover, rain-fed winter wheat planting, especially in the north, has not commenced due to the delayed onset of the wet season and poor soil moisture, despite the typical planting period having ended. Consequently, the availability of agricultural wage work has significantly diminished, with the delayed rains curtailing opportunities for agricultural labor.

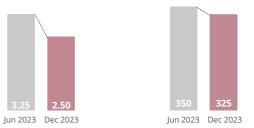
Number of available workdays has increased against the same period last year

NUMBER OF WORKING DAYS PER WEEK



The average number of available workdays per week nationwide has decreased to 2.13 days in December 2023, down from 2.46 days in September 2023. However, the availability in December represents a 22 percent increase in comparison to the same period last year.

In the northeast, unskilled labor wages and the number of working days have decreased due to the impact of the prolonged drought



While there was a marginal increase in the national number of working days per week, it has been decreased in northeastern region with the delayed start of wet season and winter wheat planting. In the northeast region, where heavily impacted by drought and precipitation deficits, the average wage of unskilled labour has declined from 350 AFN in June 2023 to 325 AFN in December 2023. Similarly, the number of working days has decreased from 3.25 days to 2.50 days in the same period.

^{4.} FEWS NET. Afghanistan Food Security Outlook Update December 2023: Precipitation deficits increase in December due to delayed start of wet season, 2023.

^{5.} The northeastern region refers to Badakhshan, Baghlan, Kunduz, and Takhar provinces.

CHAPTER 02

The data presented in this chapter are collected via mobile surveys



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 December 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 sociodemographic 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 (DECEMBER 2023)**

1,523 households surveyed



Male-headed households: 96% Female-headed households: 4%



Average household size: 10.5 members



Urban households: 48% Rural households: 52%



Households reporting having a member/s with a disability: 16%



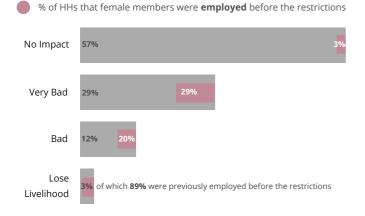


Restrictions against Women Working



Among those previously employed before the restrictions, the vast majority (77 percent) reported a very bad or bad impact on their households.

Impact of the restrictions on households DECEMBER 2023



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 nongovernmental organisations and the United Nations in 2023.

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

Among households that reported no impact, only 3 percent had female members previously employed before the restrictions. In contrast, among households that experienced a very negative impact, 29 percent had female members who were employed prior to the restrictions. Additionally, among those who reported livelihood loss due to the restrictions, 89 percent of households had female members who were previously employed.



Food Consumption



Hunger levels have consistently remained at a critical high throughout the year

Despite a slight improvement in food consumption during the spring wheat harvest season, July to September, and an overall declining trend in national cereal prices, the situation remains dire. The proportion of households with poor food consumption, which had marginally decreased to 48 percent in June 2023, rose again to 54 percent by December 2023.

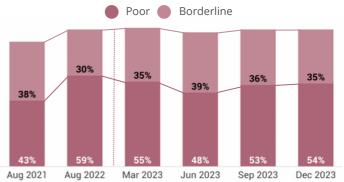
Female-headed households are disproportionately affected by negative food consumption outcomes

As of December 2023, 63 percent of femaleheaded households are experiencing poor food consumption, which is 9 percentage points higher than that of male-headed households.

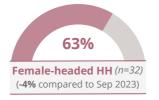
Households with Person with Disabilities (PwDs) remain disproportionately impacted

Households with PwDs are more likely to experience poor food consumption, with 64 percent having poor food consumption compared to 52 percent of households without PwDs.





Proportion of Poor Food Consumption by Gender of Household Head ⁹ 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

A modest improvement in the proportion of households employing high coping strategies has been reported

As of December 2023, 38 percent of households have engaged in high coping strategies under the consumption-based coping strategies scheme, marking a 5 percentage point decrease from the previous round in September 2023. Furthermore, this figure represents a 15 percentage point reduction compared to the same period last year.

Despite no significant changes in food consumption, the slight improvement in the proportion of households resorting to high coping strategies is noteworthy. This indicates a gradual decrease in the likelihood of households limiting their food portions at meal times and reducing the number of meals consumed daily.

This modest improvement can potentially be attributed to the beneficial effects of local harvests, which ensured that many households retained food stocks from their own production, coupled with the continuing decline in prices of key food commodities.

Consumption-based Coping Strategies

ONE YEAR COMPARISON

December 2022 VS December 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 December 2022)



Borrow food or rely on help from a relative or friend

76% (**+0%** compared to December 2022)



Reduce the number of meals eaten in a day

35% (-10% compared to December 2022)



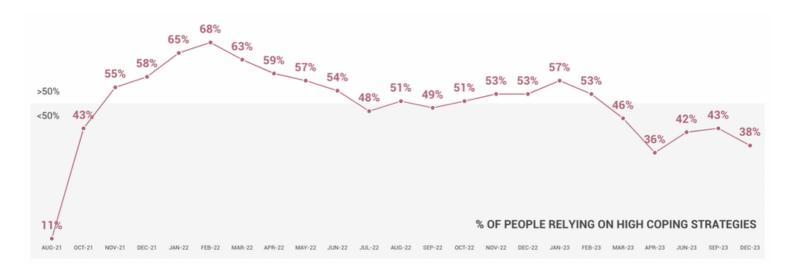
Limit portion size of meals at meal times

53% (-14% compared to December 2022)

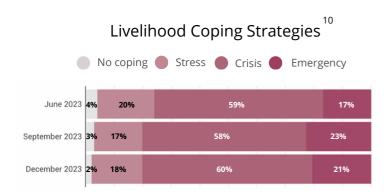


Restrict adult consumption so small children can eat

57% (**-5%** compared to December 2022)



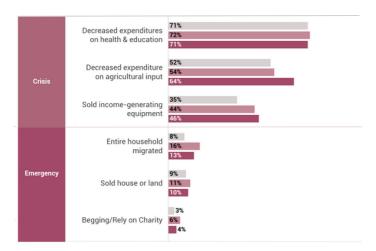
Livelihood Coping Strategies







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



Proportion of Emergency Coping Strategies by Household with PwDs

HH with PwD/s 28%

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 asset sales due to food scarcity.

11. The southern region refers to Hilmand, Kandahar, Nimroz, Uruzgan and Zabul and the northern region refers to Balkh, Faryab, Jawzjan, Samangan and Sar-e-pul.

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

The proportion of households employing emergency coping strategies remains 4 percentage points higher than in June 2023. This trend could potentially be associated with the end of the harvest season and the delayed onset of the wet season with below-average precipitation, consequently leading to a decrease in seasonal labor opportunities.

Households are increasingly compromising their expenditure on agricultural inputs

In December 2023, 64 percent of households reported a decrease in household expenditure on agricultural inputs, marking a 12 percentage point increase compared to the same period last year. This trend of reduced spending on agricultural inputs has been particularly prevalent in the southern region (74 percent) and the northern region (68 percent). In the southern region, Hilmand and Kandahar provinces have been heavily impacted by an opium ban imposed by the de facto authorities in April 2022, which likely contributed to the households' reduced expenditure on agricultural inputs. In the northern region, severely affected by drought, the delayed winter planting season may have led to decreased expenditure on agricultural inputs.

Households with Person with Disabilities (PwDs) remain disproportionately impacted

Households with PwDs are more likely to resort to emergency coping strategies, with 28 percent relying on emergency coping compared to 19 percent of households without PwDs.

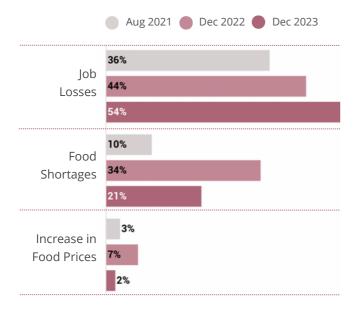
Stress coping indicates a reduced ability to deal with future shocks due to a current reduction in resources or increase in debts. Crisis coping directly reduces future productivity, including human capital formation. Emergency coping affects future productivity but are more difficult to reverse or more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

12. Opium poppy cultivation in Afghanistan plunged by an estimated 95 percent following a drug ban imposed by the de facto authorities in April 2022 (UNODC, 2023)

Concerns and Access

Top Concerns

% CITING THE TOP CONCERN



Market Access



9% (-13% compared to Dec 2022)

of households facing difficulties in accessing market

Health Access



30% (-7% compared to Dec 2023)

of households facing difficulties in accessing health care

An increasing number of households are concerned about job losses

As global and domestic food commodity prices have decreased over the past year, household concerns about food price hikes have remained minimal. However, the persistent deflation trend throughout year has heightened concerns about job losses.

Job loss worries were more frequently reported in Hirat (63 percent), Kabul (63 percent), and the Northeast (60 percent). The heightened concern about limited working opportunities in these areas can potentially be attributed to various factors: the earthquake's impact on the labor market in Hirat, reduced construction activities in Kabul with the harsh winter, and delays in the wet season and winter planting in the Northeast.

One in ten households is facing difficulties in purchasing basic needs

Lack of money has been reported as a major reason preventing access to markets at 70 percent, which is a 13 percentage point decrease from December 2023.

Over one-fourth of households have trouble accessing and/or receiving health care.

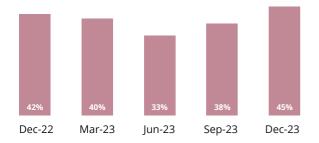
The vast majority of households (85 percent) cited lack of money as a major reason for having difficulties in accessing health care, followed by far distance to hospital (4 percent).



Incomes and Food Expenditure

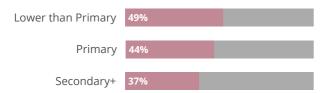
Income Change

% FACING SIGNIFICANTLY DECREASING INCOMES



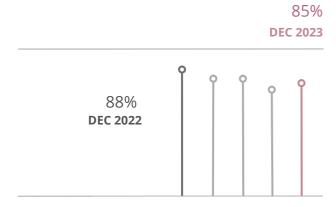
BY HOUSEHOLD HEAD'S EDUCATION

% FACING SIGNIFICANTLY DECREASING INCOMES



The majority of household income is allocated towards food expenses

PROPORTION OF INCOME SPENT ON FOOD (%)



About half of the population has experienced a significant reduction in income

The proportion of households reporting a significant decrease in their income increased from 33 percent in June 2023 to 45 percent in December 2023. This represents a 3 percentage point increase compared to the same period last year. This indicates that the reduction in seasonal labour opportunities with the end of the harvest season and the delayed onset of the winter planting season place a burden on household income.

Additionally, households headed by individuals with lower levels of education are more likely to experience a significant reduction in their income (49 percent) compared to households with a head who has completed secondary education (37 percent).

Households continued to allocate more than 80 percent of income on food

The proportion of income spent on food remained consistently high over the past year. In the region-wise analysis, the west region (Badghis, Farah and Ghor provinces) had the highest food expenditure share, with 93 percent of income spent on food.

While key food commodities prices remained stable, limited working opportunities and a slowing down of labour market with the persistent deflation trend continued to put a strain on the financial status of households.

This report updates Afghanistan's food security situation based on 23 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 2024, WFP requires US\$2.2 billion to deliver emergency food, nutrition, and livelihood support to those in need.



CHAPTER 03

Herat Earthquake & The Influx of Afghan Returnees from Pakistan

The data presented in this chapter reference WFP Herat Earthquake Response and Returnees Response Post-distribution Monitoring



Background & Methodology
Impact of Earthquake
Food Security Outcome of Earthquake-affected Population

A Closer Look at Herat Earthquake: Background & Methodology

Sample population at a glance: **DECEMBER 2023**

487 Households Surveyed

Zindajan: 37% Kushk: 36% Injil: 13%

Kushk-e-Kuhna: 10%

Gulran: 5%



Male-headed households: 91% Female-headed households: 9%



Households headed by individual with disability or chronic illness: 21%

Between October 7 and 15, three powerful earthquakes (6.3 magnitude) struck Herat Province in western Afghanistan, causing extensive destruction across 8 districts (Ghoryan, Gulran, Guzara, Herat, Injil, Kohsan, Kushk, ZindaJan) and directly affecting 275,256 people in 382 villages, with losses in food stocks and livestock. Extensive damage was reported on vital water and sanitation facilities.

WFP has been conducting post-distribution monitoring to assess the direct and indirect impact of earthquake, food security status and experiences of beneficiaries affected by the earthquakes in Herat. Data was collected face-to-face from a sample of 500 households between late November and December 2023, resulting in 487 interviews and achieving a 97 percent response rate.



Direct Impact of Earthquake

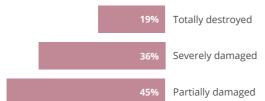
Housing and shelter



91%

answered that their housing and shelter have been affected by the earthquake,

of which



Food stock



42%

answered that their food stocks and reserves have been affected by the earthquake,

of which

31%	Totally destroyed
28%	Severely damaged
42%	Partially damaged

Infrastructure & Income-generating assets



45%

answered that household's infrastructure and income-generating assets have been affected by the earthquake,

of which

27%	Totally destroyed
31%	Severely damaged
42%	Partially damaged

Water and Sanitation



26%

answered that household's water and sanitation system have been affected by the earthquake

of which

49%	Totally destroyed
29%	Severely damaged
22%	Partially damaged

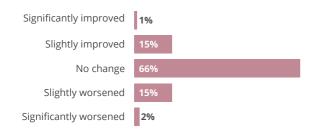
1. Grain storage facilities, livestock shelter and irrigation canal



Indirect Impact of Earthquake

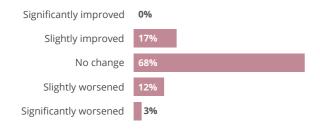
Food Accessibility

How has the earthquake affected your accessibility to markets for food and other essential items?



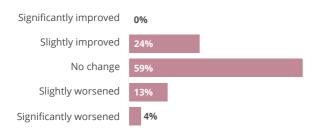
Food Availability

Have you noticed any changes in food availability in the markets since the earthquake?



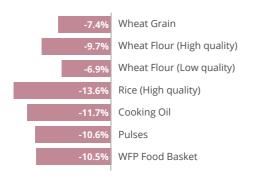
Food Prices

Have you noticed any changes in the prices of food commodities in the markets?



Change in Key Food Commodities Prices in Herat Province (Pre and Post-Earthquake)

% Change Comparison between September and December 2023



Households in Gulran and Injil are facing food accessibility challenges

While about two-thirds of respondents reported no change in their accessibility to markets after the earthquake, the remaining responses were divided. Households that experienced slightly or significantly worsened access to markets were predominantly located in Gulran (82 percent) and Injil (46 percent). Conversely, 19 percent of households in Kushk district rated their accessibility as slightly or significantly improved.

Households in the Gulan district are facing issues with food availability in the market

While approximately two-thirds of respondents reported no change in food availability in the markets since the earthquake, the remaining responses varied. About one-fifth reported a slight improvement in food availability, potentially attributed to the influx of humanitarian assistance. Notably, households that experienced a slight worsening in food availability were predominantly located in the Gulan district, accounting for 67 percent of such cases.

About one in four households observed a slight improvement in food commodity prices

About 60 percent of households reported no change in the prices of food commodities since the earthquake. However, households that experienced an increase in food prices were largely located in Injil (43 percent) and Zindajan (30 percent). In contrast, households in Kushk-e-Kuhna (50 percent) and Kushk (37 percent) reported a decrease in food prices.

The prices of key food commodities in Herat province have decreased since the earthquake

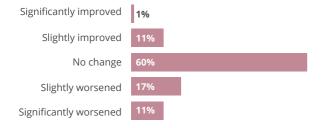
Specifically, the price of imported wheat flour in Herat province continued to decline from 31 AFN per kilogram in the pre-earthquake period (September 2023) to 28 AFN per kilogram post-earthquake (December 2023).

This price stability can be partially attributed to the yearlong declining trend in global cereal prices and appreciation of AFN. Additionally, the completion of recent harvests within the country, coupled with favorable production in Kazakhstan and Uzbekistan, has ensured a steady supply of imported wheat flour.

Indirect Impact of Earthquake

Labour Opportunities

Have labor opportunities for your household changed since the earthquake, either from a market slowdown or increased opportunities due to humanitarian assistance?



Purchasing Power

How has your household's purchasing power or income level changed since the earthquake?

Significantly improved	0%
Slightly improved	12%
No change	31%
Slightly worsened	42%
Significantly worsened	16%

About one in four households have faced a decrease in working opportunities

Although a significant proportion of households reported no change in working opportunities after the earthquake, 73 percent of households in Injil and 56 percent in Gulran experienced a slight or significant decrease. This decline is attributed to a slowdown in the labor market. Conversely, around one in four households (26 percent) in Zindajan have experienced a slight or significant increase in labor opportunities, likely due to the influx of humanitarian assistance.

More than half of the households have observed a decrease in their purchasing power

While 58 percent of households reported a decline in income level and purchasing power post-earthquake, only 12 percent saw an improvement. The earthquake's disruption has extended to the industrial sector within Herat province, damaging factories and causing a subsequent deceleration in the labor market. Households engaged in skilled labour, manufacturing and small businesses are also facing economic strain due to the slowdown in commercial activity and the redirection of finances toward reconstruction efforts.



Food Consumption

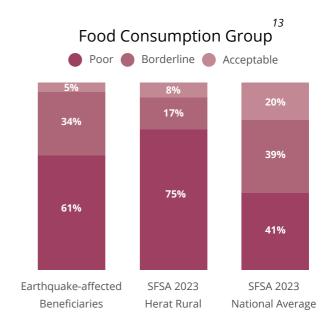


Households in earthquake-affected areas face significant food consumption challenges

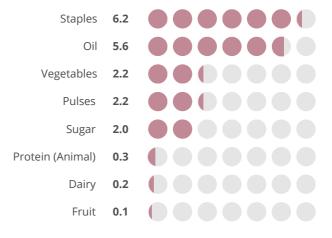
There is a heightened prevalence of poor food consumption among households in earthquake-affected areas, which is 20 percentage points higher than the national average. Additionally, when comparing the prevalence of poor food consumption among earthquake-affected beneficiaries, it was found to be 14 percentage points lower than the average in Herat rural areas. This suggests the effectiveness of emergency food assistance in mitigating food insecurity.

There is a discernible trend of people consuming less diverse diets

While staple foods and oil are consumed among earthquake-affected households regularly, averaging six days a week, the intake of other essential food groups remained at significantly low level. Specifically, the animal-sourced protein is consumed only 0.3 days a week, dairy 0.2 days, and fruit is barely consumed at 0.1 day. Additionally, vegetables and pulses are consumed only 2.2 days a week. This significant lack of dietary diversity is concerning as it can lead to nutrient deficiencies and consequent health problems.



Food Groups by Number of Days AVERAGE CONSUMPTION EVERY 7 DAYS IN DEC 2023



13. The data for Herat rural and national average were sourced from the Afghanistan Seasonal Food Security Assessment (SFSA), 2023.



Livelihood Coping Strategies

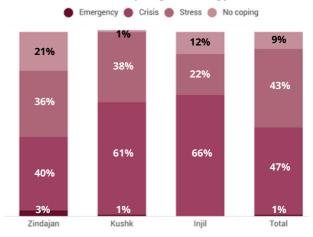
About half of the households are resorting to crisis or emergency coping strategies

A significantly high proportion of earthquake affected households are resorting to crisis or emergency coping strategies. Given that the livelihood coping strategy index is based on a 30-day recall period, there is a potential for an increased reliance on crisis or emergency coping strategies as the direct and indirect impacts of the earthquake continue throughout the winter season.

Households have begun to decrease their expenditures on health and education

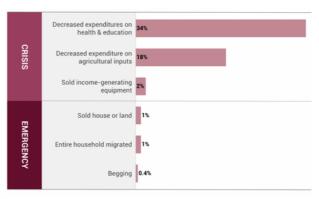
This trend is more pronounced in the Injil district, where 52 percent of households are cutting back on these essential expenditures on health and education, compared to other districts. Furthermore, just under one-fifth of households (18 percent) have reduced spending on agricultural inputs. This practice is more prevalent in the Kushk district, where 29 percent of households have decreased their agricultural investment.

Livelihood Coping Strategy Index



Details on Livelihood Coping Strategies

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



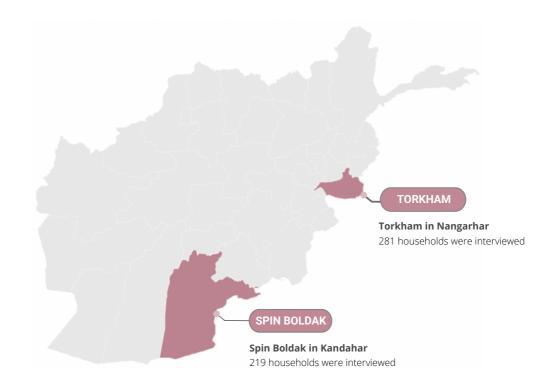


A Closer Look at Afghan Returnees from Pakistan

Background

Since the Government of Pakistan's announcement in October 2023 mandating the deportation of all undocumented foreigners, there has been an influx of Afghan returnees crossing through the Torkham and Spin Boldak borders. As of January 4, 2024, approximately 493,300 people have returned to Afghanistan, according to UNHCR.

With this forced deportation, many of these returnees were compelled to leave behind most of their possessions, leading to considerable vulnerability. Restrictions included livestock such as cows and goats, motorbikes, and other personal assets. Furthermore, they were not allowed to bring more than 50,000 PKR (approximately 180 USD) into the country.



Sample population at a glance: **DECEMBER 2023**

500 Households Surveyed



Spin Boldak in Kandahar: 44% Tokham in Nangarhar: 56%



Male-headed households: 93% Female-headed households: 7%



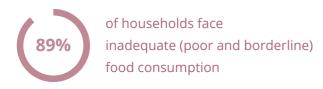
Households headed by individual with disability or chronic illness: 8%

Methodology

This survey is designed to measure the food security status and experiences of targeted beneficiaries who recently deported from Pakistan to Afghanistan.

Data collection, conducted using the mVAM tool, targeted a sample of 500 households. It was completed between late November and December 2023, with a total of 500 interviews conducted, achieving a 100 percent response rate. The list of beneficiaries for sampling was prepared by CPs and staffs of Jalalabad and Kandahar Area Offices. The selection of beneficiaries for interview was conducted by a random sampling approach.

Food Security Outcome



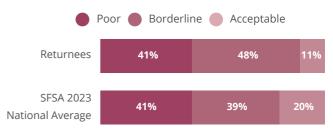
Households returning to Afghanistan face significant food consumption challenges

Households that returned from Pakistan exhibited a higher prevalence of inadequate food consumption, which was 9 percentage points higher than the national average reported in the September 2023 SFSA.

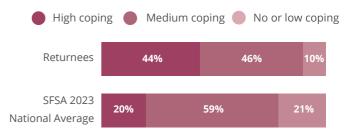
People are resort to drastic measures to meet immediate food needs

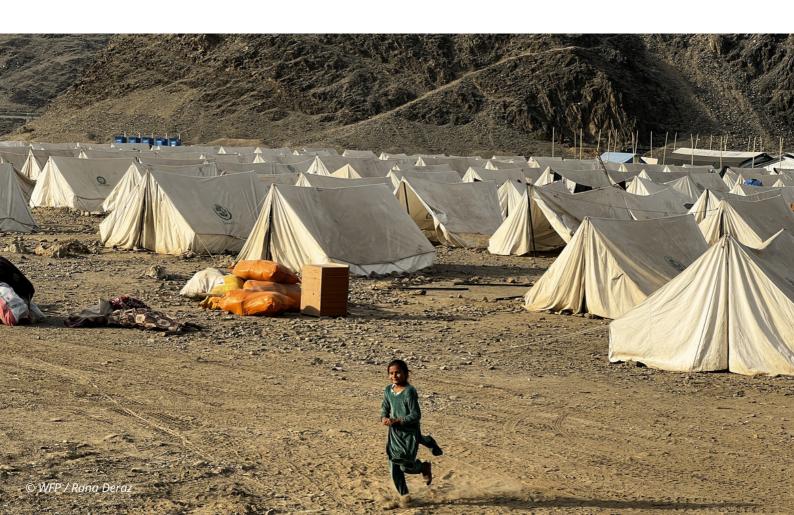
Nearly half of the surveyed households (44 percent) were found to be resorting to high coping strategies, which was 24 percentage points higher than the national average. This indicates an increasing trend in compromising food quality and decreasing meal frequency among households to meet basic food needs.

Food Consumption Group



Reduced Coping Strategies Index



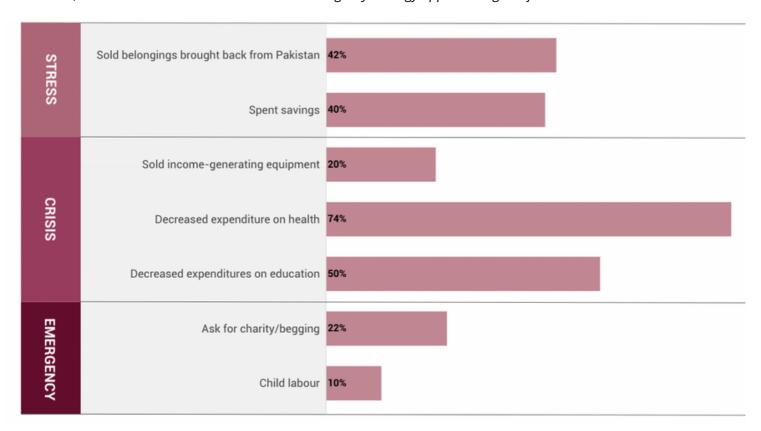


Livelihood Coping Strategies

Details for Livelihood Coping Strategy

% OF HOUSEHOLDS ADOPTING EACH STRATEGY

A shortened questionnaire was used for this survey, there is no standardized LCSI calculation. However, the overall reliance on each crisis and emergency strategy appeared high as follows.



People are selling income-generating assets to meet their basic food needs

About one in five households that returned to Afghanistan has sold income-generating assets that could eventually limit their future productivity. Furthermore, a significant proportion of households are reducing expenditures on health (74 percent) and education (50 percent).

In one out of every ten households that are returning, children are compelled to work

While about one-fifth of the households rely on charity or begging, the prevalence of child labor is notably high at 10 percent. This reflects the precarious conditions faced by displaced households. Moreover, their reliance on emergency coping strategies may increase as the labor market slows down during the harsh winter.

