



## BANGLADESH FOOD SECURITY MONITORING QUARTERLY BULLETIN

Issue No.17  
April-June 2014

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### HIGHLIGHTS

**Retail price of food:** The national average retail prices of rice and wholemeal wheat flour (*atta*) decreased slightly from the quarter of January-March 2014. Prices of lentils (*masur*) and oil (palm oil) began to increase prior to the month of Ramadan (July 2014) and are on an increasing trend. The average retail price of coarse rice decreased from 34 Tk/kg in April to 32.5 Tk/kg in June after the *Boro* harvest. The price in June is 13 percent higher than a year ago and 25 percent more than in June 2012. Prices are recorded higher in the divisional *sadar* markets of Barisal, Chittagong, Dhaka and Sylhet divisions than in Khulna and Rajshahi divisions. The average retail price of wholemeal wheat flour (*atta*) in the current quarter decreased slightly from the previous quarter and is on a decreasing trend. The price was exceptionally high in Sylhet division compared to other divisions. The average retail price of palm oil has been rising steadily since February 2014 and stood at 83 Tk/litre in June (up by 7 percent in four months). After decreasing throughout the previous quarter, the average retail price of lentils (*masur*) increased by 4 percent from April to June.

**Inflation:** General inflation fell to 6.97 percent in June on the back of a sharp fall in food inflation (from 9.09 percent in May to 8 percent in June). The Government set an ambitious inflation target of 6 percent for FY 2014/15.

**Remittances:** The remittance inflow (in USD) through formal channels in the second half of FY 2013/14 increased by 10 percent compared to the first half. However, total remittance inflow in FY 2013/14 (USD 14.23 billion) is 2 percent lower than in FY 2012/13 and this is the first time in 12 years that the remittance inflow dropped year-on-year.

**Food production, import and stock:** Rice production from *Aus* (harvested in July-August) and *Aman* (harvested in November to mid-January) is estimated by the Bangladesh Bureau of Statistics at 2.33 million MT and 13.02 million MT, which is slightly short of the target but higher than the actual production a year ago. The *Boro* production estimate has not been published but due to favourable weather conditions during the cultivation period, production is expected to have reached the target. The opening public stock of food grain for the FY 2014/15 was 1.15 million MT which has increased by around 20 percent from FY 2013/14 but is still low compared to FY 2012/13. The cumulative import of rice in FY 2013/14 was 0.38 million MT which was minimal and constituted mainly of private sector imports. The cumulative import of wheat was 2.7 million MT which was way above the import target (0.96 million MT).

**Public food distribution:** The Government distributed a total of 2.23 million MT of food grain (1.27 million MT of rice and 0.96 million MT of wheat) under the PFDS against a revised target of 2.56 million MT.

**Wage rate and purchasing capacity:** Year-on-year average agricultural daily wages for male labourers in the months of 2014 (latest available wage data from BBS is till March 2014) have increased by 5-8 percent. Rice purchasing capacity has improved in 2014 following decreasing trends in 2013. There continues to be a significant difference between the agricultural daily wages for male and female labourers. In March, which is agricultural lean season, the average wage for a female labourer was only 221 Taka/day whereas for a male labourer it was 278 Taka/day – a difference of 57 Taka/day.

**Global food prices:** Global food prices declined consecutively for three months (April to June) after increasing in the previous two months over speculation of unfavourable weather and political tensions in the Black Sea region. Cereal prices fell as production prospects improved and there were diminishing negative speculations over shipments from Ukraine.

## ENVIRONMENTAL CONDITIONS

### Favourable weather conditions for Boro harvesting and wheat planting

In the agricultural calendar *Boro* paddy is harvested in the April-May period and *Aman* is planted in the May-July period.

Month-Year	Average Rainfall (mm)			Average Temperature (Celsius)		
	Actual	Normal	Deviation (%)	Actual	Normal	Deviation (%)
Apr-14	27.90	130.00	-78.5	29.85	28.65	4.2
May-14	212.90	277.00	-23.1	30.75	28.70	7.1
Jun-14	543.80	459.00	18.5	29.50	28.75	2.6

Source: Bangladesh Meteorological Department

The country did not experience any early flash floods in March-April, which could have damaged the *Boro* paddy especially in the north-eastern *Haor* districts.

*Aus* planting season is from March to May and the rice varieties benefit from the summer rain. Rainfall was around 55 percent less than normal during this period, but adequate for *Aus* cultivation. Rainfall was also adequate for rainfall-dependent *Aman* varieties.

## ECONOMIC CONDITIONS

### INFLATION AND REMITTANCES

#### Food inflation dropped in June after increasing in the past four months

General inflation, measured by the point to point variation in the Consumer Price Index (CPI), fell to 6.97 percent in June after hovering around 7.5 percent in the previous five months. It fell on the back of a sharp reduction in food inflation in June 2014 (from 9.09 percent in May to 8 percent in June).

The decrease in rice price, which has an 80 percent weight in food inflation, due to a bumper *Boro* harvest and the increase in food imports at a time of low and stable international food price levels may have contributed to the decline in food inflation.



Food inflation is still very high compared to the pre-*hartal*/strike months in 2013 (5.02 percent in January 2013). Along with other economic and seasonality

	Inflation Rate (%) April-June 2014				
	General	Food	Non-Food	Food_Rural	Food_Urban
Apr-14	7.46	8.95	5.23	8.52	9.99
May-14	7.48	9.09	5.16	8.72	9.98
Jun-14	6.97	8.00	5.45	7.64	8.87

Base year: 2005/06 Source: BBS

factors political unrest resulting in *hartal*/strikes and blockades, which intensified during the months of November and December 2013, is considered a major contributing factor to the rise in food prices in 2013.

Non-food inflation went up slightly in June after declining steadily in the previous four months. The World Bank related the recent recovery in economic activities aided by political stability, revival of income growth in services and a significant moderation of remittance decline, to the slight increase while the Bangladesh

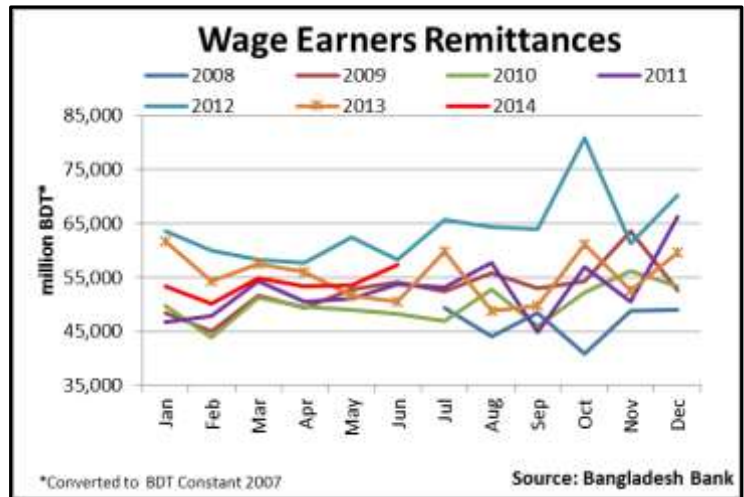
Institute of Development Studies considered the recent increase in consumer credit through banks as one of the reasons (03 August 2014, *The Daily Star*).

The average general inflation rate for FY 2013/14 was 7.35 percent against a target of 7 percent and an actual inflation rate of 6.68 percent in FY 2012/13. The Finance Minister in his Budget Speech in June set an ambitious inflation target of 6 percent for FY 2014/15.

**Remittance inflow dropped in FY 2013/14 for the first time in a decade**

With the country being relatively more stable politically and economically after the national election in January, remittance inflow was expected to gear up in the second half of FY 2013/14. Accordingly the remittance inflow (in USD) through formal channels in the second half of FY 2013/14 increased by 10 percent compared to the first half.

However, the total remittance inflow in FY 2013/14 (USD 14.23 billion) is 2 percent lower than in FY 2012/13, and it is the first time in 12 years that the remittance inflow dropped year-on-year. The main causes were political turmoil which disrupted and increased the costs of transactions, strengthened law enforcement against illegal workers, and the appreciation of the Taka against the USD. The rate of growth of migrant outflow continues to decline and the cumulative migrant outflow in FY 2013/14 is 7 percent less year-on-year.

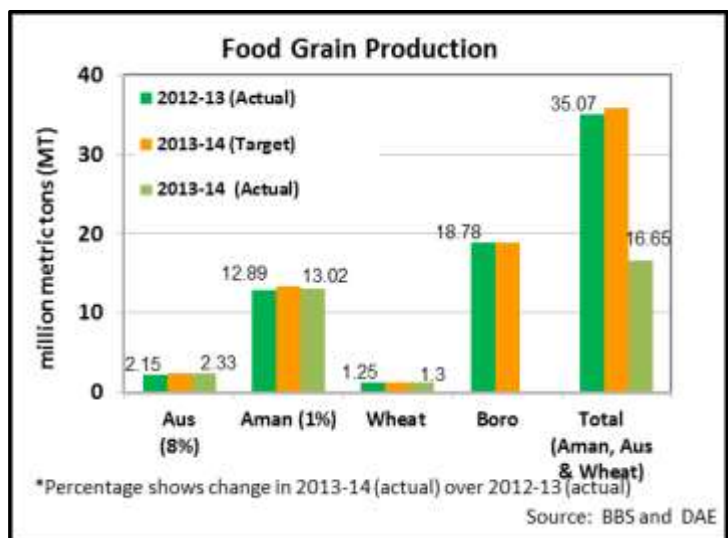


**FOOD AVAILABILITY**

**CROP PRODUCTION, FOOD GRAIN IMPORT AND PUBLIC GRAIN STOCK**

**Rice production in Aus and Aman falls slightly short of target, but was higher than a year ago**

- The Department of Agricultural Extension (DAE) set the target for total rice production in FY 2013/14 at 34.61 million MT. The targets for *Aus*, *Aman*, *Boro* and wheat production are 2.41 million MT, 13.28 million MT, 18.92 million MT and 1.28 million MT respectively (*FPMU, FSR 95*).
- Rice production from *Aus* (harvested in July-August) and *Aman* (harvested in November to mid-January) is estimated by BBS at 2.33 million MT and 13.02 million MT-which is slightly short of the target but higher (by 8 percent and 1 percent respectively) than the actual production a year ago. BBS finalized the wheat production estimate at 1.30 million MT.

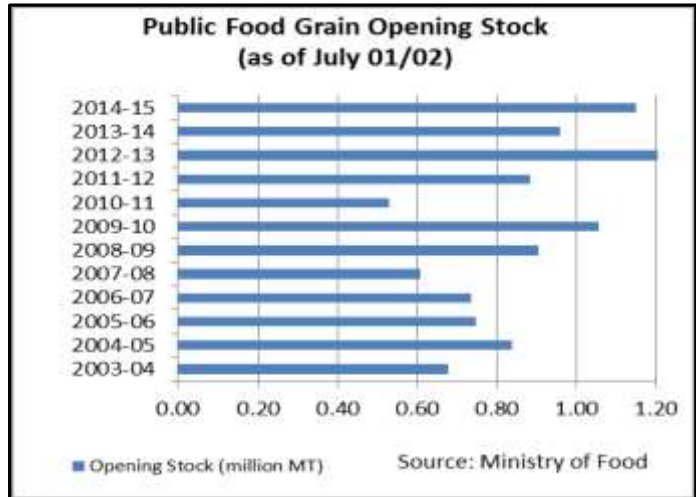


- The *Boro* production estimate has not been published but due to favourable weather conditions during the cultivation period, the production is expected to have reached target.

### **Food grain stocks, import, procurement and distribution**

#### **Food grain stocks: Opening public stock of food grain higher than in previous FY**

- The opening public stock of food grain for the FY 2014/15 was 1.15 million MT which has improved by around 20 percent from FY 2013/14 but is still low compared to FY 2012/13. Relatively high amounts of public distribution and low amounts of procurement of food grain during the second half of the FY 2012/13 had contributed to low end-of-FY stocks; this situation continued into FY 2013/14.
- With high food grain requirements for the Public Food Grain Distribution System (PFDS) during the quarter of October-December 2013, the end-of-month stocks of Government were lowest in December at 0.98 million MT (Ministry of Food).



#### **Food grain imports: Rice import minimal, wheat import geared up with increased share in PFDS programmes**

- Import of rice by both the private sector and the public sector was minimal in the first half of FY 2013/14 which was marred by frequent strikes and transport blockades. Cumulative import of rice in the FY 2013/14 was 0.38 million MT which is minimal and constituted mainly of private sector imports.
- Cumulative import of wheat was 2.7 million MT which is way above the import target (0.96 million MT) for FY 2013/14 as proposed in the budget speech. Public wheat import was geared up with the Government increasing the share of wheat in the PFDS programmes.

#### **Food grain procurement: Rice and wheat procurement target met for FY 2013/14**

- Actual rice and wheat procurements in FY 2013/14 were 1.29 million MT and 0.15 million MT respectively against revised targets of 1.30 million MT of rice and 0.15 million MT of wheat.
- *Boro* rice procurement started on 01 May with a target of 1 million MT of rice at 31 Tk/kg (which was 29 Tk/kg last year) and 0.15 million MT of paddy at 20 Tk/kg by 31 August. The production cost of *Boro* rice is estimated at 26.5 Tk/kg (which was 26 Tk/kg last year). Last year the actual procurement of *Boro* rice (0.83 million MT) fell short of its target of 1 million MT as the average market price was higher than the fixed procurement price. The increase in procurement price may largely benefit rice millers but the Directorate General of Food (DG Food) speculates that it will benefit small and marginal farmers as well through increased demand in the market by the millers.

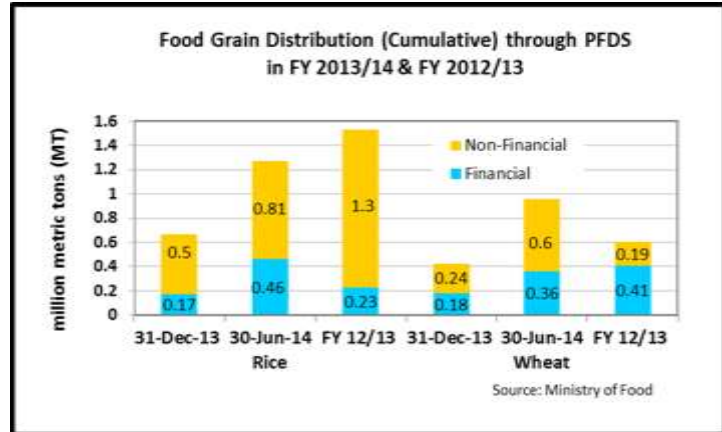
#### **Food grain distribution through PFDS: Wheat distribution increases and rice distribution decreases significantly**

- The total food grain distribution planned for FY 2013/14 was 2.73 million MT (*FPMU, FSR 94*) and was revised to 2.56 million MT (*FPMU, FSR 95*) against the actual distribution of 2.08 million MT in FY 2012/13. The Government actually distributed a total of 2.23 million MT of food grain (1.27 million MT of rice and 0.96 million MT of wheat) under PFDS.
- The second half of FY 2013/14 was marked by frequent *hartal*/strikes and blockades which disrupted the supply chain of rice while the price was already high and the Government increased the amount of



rice distributed especially through Test Relief (TR), Vulnerable Group Feeding (VGF) and Open Market Sales (OMS) programmes (*Ministry of Food*).

- The share of wheat in the food grain distribution has increased significantly. In the FY 2013/14 around 45 percent of the total amount of food grain distributed through the PFDS was wheat compared to around 30 percent in the previous two FYs.



## FOOD PRICE MONITORING

### WHOLESALE AND RETAIL PRICES AND TERMS OF TRADE

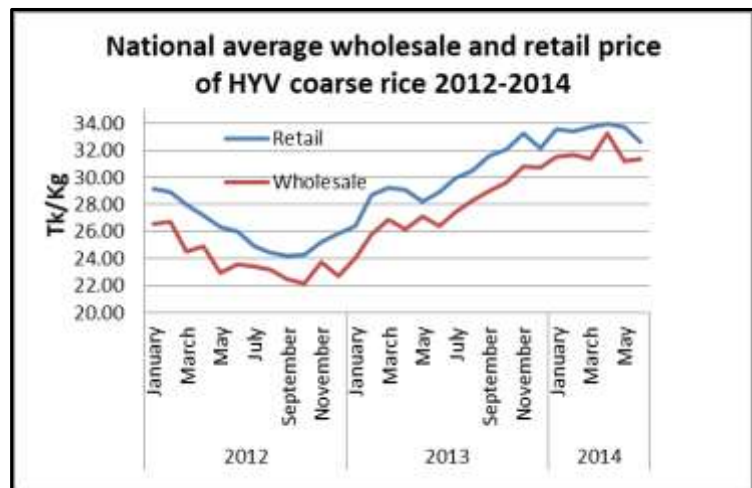
**Nominal and Real Wholesale Prices of Rice and Wheat in Bangladesh: Rice price decreases after Boro harvest, while wheat price increases in the current quarter**

In 2013, both wholesale and retail prices of rice were in general high which was mainly an effect of the disruption in the supply chain due to *hartal*/strikes and blockades. In 2014, the *hartal* and blockades continued till mid-January.

Rice prices are usually expected to come down after the *Boro* harvest (May-June) and after the *Aman* harvest (December-January). During the *Aman* harvest period of 2013-2014, the national average wholesale price of rice came down by only 0.25 percent from November to December.

Prices increased in January, remained stable in February and March and went up again in April (32.88 Tk/kg) prior to the *Boro* harvest.

The rice price came down in May-June (to around 30Tk/kg), however is still 11 percent higher than the price a year ago.



Average whole sale price of rice & wheat (Tk/Quintal); Dhaka Division				
Time Period	Rice		Wheat	
	Nominal Price	Real Price	Nominal Price	Real Price
Apr-June'14	3161	1601	2531	1282
Previous Quarter (Jan-Mar'14)	3361	1693	2605	1298
Previous Year (Apr-June'14)	2928	1596	2845	1546
Pre-shock Years (Apr-June '07)	1958	1748	1933	1725
Shock Period (Mar-May '08)	3081	2477	3149	2532

Source:DAM

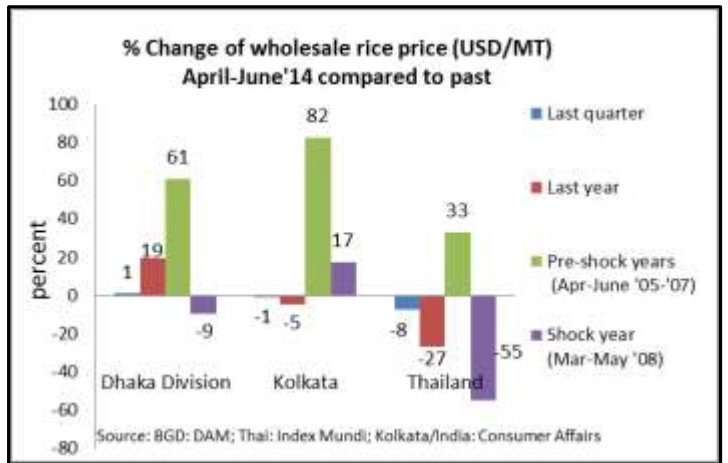
The wholesale price of wheat in Dhaka *Sadar* steadily dropped from June to November 2013 and since December 2013 has been fluctuating- decreasing and increasing in alternate months-but averaging around 25 Tk/kg. In the current quarter, the average wholesale nominal price and real price is significantly less (by 11 percent and 17 percent respectively) than in the corresponding quarter of 2013.

**International wholesale prices of rice and wheat: Rice prices are stable, wheat prices drop in June**

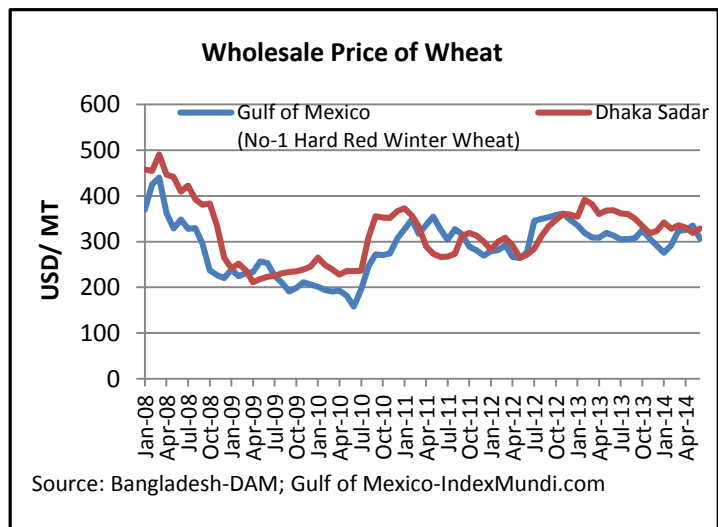
International rice prices, as per FAO rice price index (which is based on 16 rice export quotations), fell throughout 2013 with small fluctuations. The index increased from 227 in January to 238 in June 2014 with relative stability since March. The wholesale rice prices in Kolkata (India) and of Thai 5% broken rice were unstable in the current quarter—dropping by around 11 percent and 8 percent respectively from March to April only to rise again in May-June.



A convergence of prices in Dhaka division, in Kolkata and in Thailand is observed in recent months which bear important trade implications. The average wholesale prices of Dhaka coarse rice, Kolkata coarse rice, and Thai 5% broken rice in June were 401 USD/MT, 385 USD/MT and 415 USD/MT respectively.



Export prices in Thailand increased in June (by 3 percent from May) after the current Government announced it would not continue the controversial rice pledging programme which had been introduced in 2011 by the previous Government. In an effort to boost farmers' incomes, in 2011 the Government had started paying paddy farmers 15,000 baht (US\$420) per ton - a 60 percent increase over 2010. With its higher price Thailand lost out to India (which took off a four year ban on the export of non-basmati rice) in 2012 as the world's largest rice exporter. One year after the start of the programme rice export prices for Thailand were on a decreasing trend as it tried to sell its huge stockpile of rice as a result of the intervention. Thailand may be set to reclaim its status as world's largest rice exporter as weak monsoon rains curb India's production (21 July 2014, Reuters).



After decreasing steadily from October 2013 to January 2014, the average wholesale price of wheat in the Gulf of Mexico increased significantly in the following four months over growing speculation on effects of unfavourable weather in parts of the American continent. The price went up by 20 percent from January to

May 2014. With improvements in production prospects, it dropped again by 8 percent in June 2014 (335 USD/MT in May to 307 USD/MT in June).

Bangladesh is South Asia's biggest wheat importer and wholesale prices are mainly influenced by international prices. In 2013 the price difference with the Gulf of Mexico market went up as high as 72 USD/MT. In recent months prices have shown better convergence.

**Retail prices for essential food commodities: Prices of rice and wheat flour decrease slightly, prices of lentils (masur) and palm oil increase**

The national average retail prices of rice and wholemeal wheat flour (*atta*) decreased slightly from the quarter of January-March 2014. Prices of lentils (*masur*) and oil (palm oil) began to increase prior to the month of Ramadan (July 2014) and are on an increasing trend.

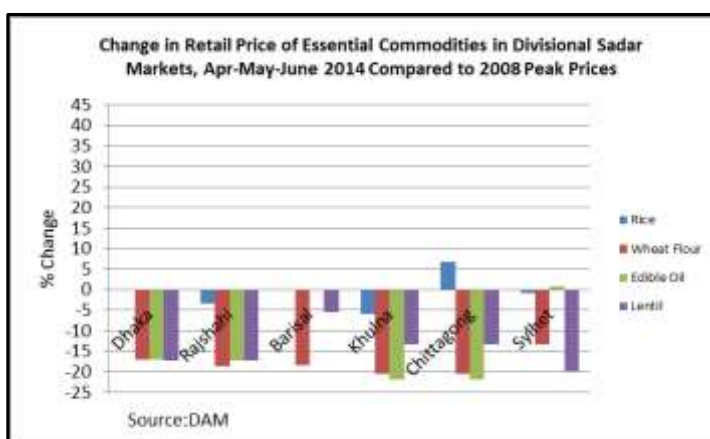
The national average retail price of coarse rice decreased from 34 Tk/kg in April to 32.5 Tk/kg in June after the *Boro* harvest, which accounts for 55 percent of the total domestic rice production. The price in June is 13 percent higher than a year ago and 25 percent higher than in June 2012. Prices are recorded higher in the divisional *sadar* markets of Barisal, Chittagong, Dhaka and Sylhet (around 34 Tk/kg) than in Khulna (31 Tk/kg) and Rajshahi (32 Tk/kg) divisions.

Retail prices of essential food commodities (Tk/kg); Dhaka Sadar Market					
	Jan'14	Apr'14	May'14	June'14	Peak 2008
Coarse Rice	35	35	36	34	35
Whole w heat flour	38	38	37	37	45
Palm Oil	76	81	83	85	100
Lentil (masur)	77	77	76	78	92

% Change of Retail Prices (National Average) of April-June'14 compared to-			
Commodities	Last Quarter Jan-Mar'14	Last Year Apr-June'13	2008 (high food price)
Coarse Rice	-0.4	16.4	0.9
Wheat Flour (atta)	-1.2	-2.5	-16.0
Palm Oil	4.2	2.6	-19.7
Lentil (masur)	-0.2	-2.7	-9.8

The average retail price of wholemeal wheat flour (*atta*) in the current quarter decreased slightly from the previous quarter and is on a decreasing trend. The price was exceptionally high in Sylhet division (39 Tk/kg) compared to other divisions (36 Tk/kg).

After decreasing steadily for a year (from 105 Tk/litre in August 2012 to 76 Tk/litre in September 2013), the retail price of palm oil rose again in all divisions throughout the *hartal*-stricken quarter of October-December 2013 and fluctuated around 79 Tk/litre in the previous quarter. The national average price rose steadily from February 2014 and stood at 83 Tk/litre in June 2014 (up by 7 percent in four months).

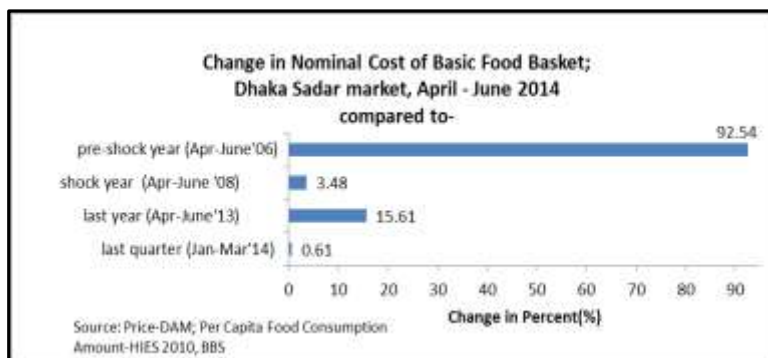


Palm oil is the dominating edible oil in the country, accounting for around 64 percent of the market share among the three major edible oils (the other two are soybean oil and mustard oil). 90 percent of the edible oil requirement is imported. Despite static oil prices in the international market, prices in Bangladesh kept rising in the months nearing Ramadan when the use of edible oil increases.

After decreasing throughout the previous quarter, the average retail price of lentils (*masur*) increased by 4 percent from April to June. Prices ranged from 81 Tk/kg in Dhaka division to 84 Tk/kg in Chittagong division.

### Retail cost of basic food basket

The cost of this basket is calculated based on the monthly average prices of essential food items, i.e. rice, wheat flour, edible oil and lentils and the average daily consumption of these items (Source: Household Income and Expenditure Survey 2010, BBS) by a typical 5-member household. With rice constituting around 80 percent of the total cost of a basic food basket, divisional variations in cost are mostly reflections of divisional variations in rice retail prices. In the current quarter, the cost is highest in Chittagong division followed by Dhaka and Sylhet divisions.



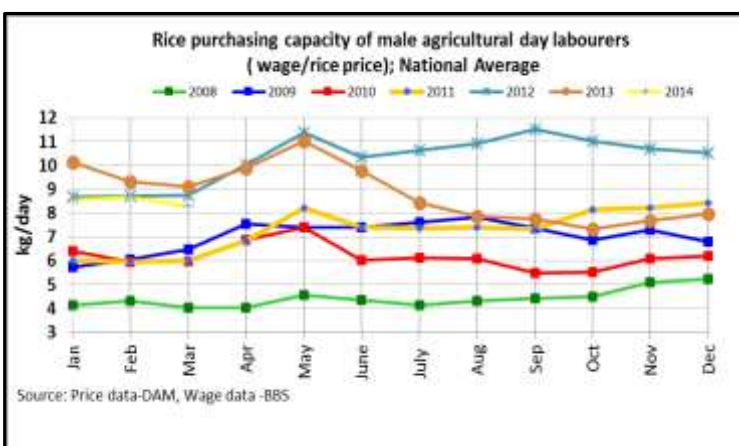
The average daily household food basket cost in Dhaka Sadar during January-March 2014 (Taka 87.29) remained unchanged from the previous quarter (Taka 87.83).

### Terms of Trade/ Food purchasing capacity of agricultural day labourers: Rice purchasing capacity began to improve from the beginning of 2014

Year-on-year average agricultural daily wages for male labourers in the months of 2014 (latest available wage data from BBS is till March 2014) have increased by 5-8 percent. The average rate of growth in 2012 was 15 percent. Compared to that it was only 5 percent in 2013-a year marred by political turmoil which affected the migration of labourers during agricultural peak seasons.



There continues to be a significant difference between the agricultural daily wages for male and female labourers. In March, which is agricultural lean season, the average wage for a female labourer was only 221 Taka/day whereas for a male labourer it was 278 Taka/day – a difference of 57 Taka/day. After the Aman harvesting period ends, there are far less work opportunities for female agricultural labourers than for their male counterparts. Agricultural activities such as Boro planting are predominantly practiced by male agricultural labourers.



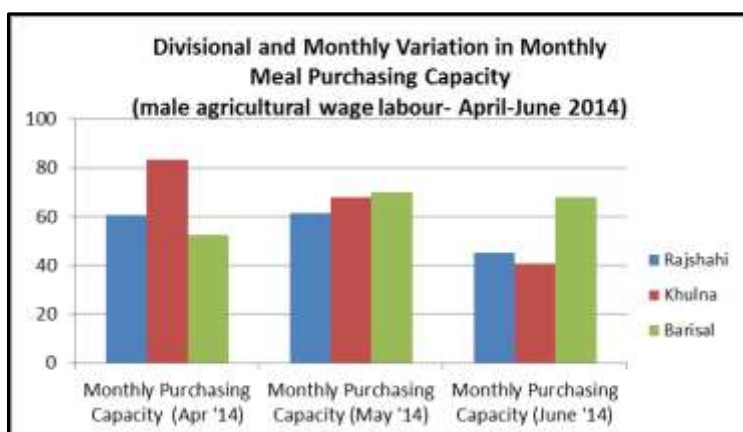
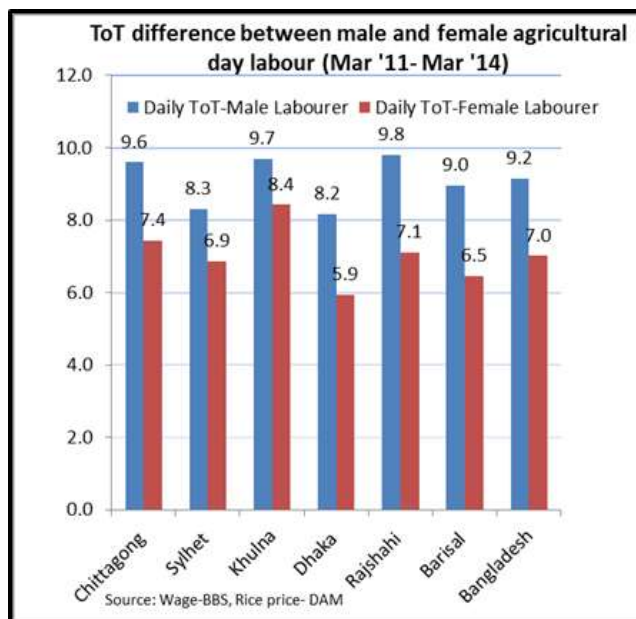
The Terms of Trade (ToT) of agricultural day labourers is an indicator of the quantity of essential food items that an agricultural day labourer can buy with his/her daily income. Since rice is the staple food and constitutes the major share in household food expenditure, rice purchasing capacity is an important indicator of the ToT.



Rice purchasing capacity has begun to improve in 2014 following decreasing trends in 2013. With an increase in rice prices in 2013, it was expected that the purchasing capacity would not be as high as in 2012. However the gap between 2012 and 2013 ToTs widened to an average of 3 kg/day in the second half of 2013 and from October the ToT was less than 2011 levels.

The difference in wage between male and female agricultural day labourers is reflected in the ToT. In the past three years, the average gap has been 2 kg of rice per day. This has had significant implications on the food security status of households dependent solely on the income of female members.

The monthly basic food basket purchasing capacity is measured by multiplying the daily capacity of an agricultural wage labourer to purchase a basic food basket for a typical 5 member household with the average number of work days available in a month. Across divisions over the period October to December 2013, the cost for rice constituted 82 percent of the total cost of a basic food basket of rice, lentils, edible oil and wheat four. Differences in rice prices weigh little on the monthly ToT. The significant difference in the monthly ToT is due to regional differences in wage rates and work opportunities. Wage rates are usually higher in the southern divisions than in the northern Rajshahi division which results in better purchasing capacity of agricultural labourers in Barisal and Khulna divisions than in Rajshahi division.



	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
1. Aus Rice			Planting	Planting	Planting		Harvesting	Harvesting				
2. Aman Rice						Planting	Planting	Planting				
3. Wheat				Planting	Planting						Harvesting	Harvesting
4. Boro Rice	Planting	Planting			Planting	Planting						Harvesting

## FOOD SECURITY OUTLOOK

### FOOD GRAIN PRODUCTION, IMPORT, EXPORT AND PRICE PROSPECT

#### Global

Global food prices declined consecutively for three months (April to June 2014) after increasing in the previous two months over speculation of unfavourable weather and political tensions in the Black Sea region (concerning Ukraine which is considered the breadbasket of Europe). The Food Price Index (consisting of average food price indices of five commodity groups-cereal, dairy, oil, sugar and meat) reported by the Food and Agriculture Organization (FAO) declined to 206 points in June from 213 points in March 2014 which

was the highest since May 2013. The decline was mainly on the back of a reduction in cereal and vegetable oil prices.

Cereal prices fell as production prospects improved and there was diminishing negative speculation over shipments from Ukraine. The July forecast for world cereal production in 2014 was revised to 2.5 billion MT -up by 18 million MT from the June forecast (*FAO Cereal Supply and Demand Brief, July 2014*). The recent upward revision reflects improved production prospects for coarse grains and wheat crops, particularly in the United States, the EU and India.

## **Bangladesh**

Although food inflation decreased at the end of the FY, rice price levels remain high compared to the past few years. The Government's general inflation target of 6 percent is very ambitious given that rice price levels are yet to show any significant decreasing trend (rice price has 80 percent weight in food inflation). The recent decrease in rice price is the result of a bumper *Boro* harvest which will soon be followed by a lean season.

Public wheat import has been geared up with the Government increasing the share of wheat in the PFDS programmes. International wheat prices were speculated to increase due to the effect of unfavourable weather. That speculation has subdued and wheat prices are on a decreasing trend.

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The Bangladesh Food Security Monitoring Bulletin is prepared by the Vulnerability Analysis and Mapping (VAM) unit of the World Food Programme (WFP) and published by the WFP Bangladesh Country Office. It is published four times a year and focuses on developments affecting food security in Bangladesh. This issue covers the quarter of April to June 2014.

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For suggestions or queries, please contact Kayenat Kabir, Senior Programme Officer, VAM Unit, WFP Bangladesh at [kayenat.kabir@wfp.org](mailto:kayenat.kabir@wfp.org).

