Overview of household food security between August and December 2010

- Overall food security situation is similar to the April-July period (6% severe and 24% moderate) but the dietary diversity of households not cultivating crops and living in remote areas and the number of meals eaten daily decreased.

- Rural households still benefit from a fairly good harvest, healthier livestock and high remittances but seasonal employment opportunities are decreasing.

- High staple food prices represent the main threat to households’ food security. The cost of the minimum food basket is at its highest: TJS 110/USD 25 per person per month compared to TJS 92/US$ 21 last year.

- Low dietary diversity might lead to acute malnutrition in remote areas and among the poorest households and further increase stunting.

- Food stocks are lower than last year at the same period, especially for wheat flour. To replenish their stocks before the winter and to cope with high prices and other shocks, households are selling more assets than usual, especially animals.

Focus on most the food insecure zones – December 2010

<table>
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<th>Area</th>
<th>Characteristics</th>
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| K. Mastchoh, Aini, South Pendjakent (56%) | Households rely mainly on daily wage labor and small remittances, few livestock owned. 
- 64% of the total budget is spent on food and 10% on fuel. 
- Current food stocks not sufficient for winter months, most food is bought on credit. 
- Poor dietary diversity: few proteins and fat, frequent problem satisfying food needs. 
- Main shocks: high food prices, reduced agricultural water and illness of household member. 
- Highest coping strategy index: often borrow food from relatives and limit size and number of meals. |
| Khuroson, Yovon, Jomi (49%) | 50% of households receive less remittance income than usual. 
- Families are purchasing cheaper foods on credit and the limit size of their meals. 
- Livestock is sold more than usual to cover high food prices, loss/lack of employment and loss of harvest due to high level of pest and crop diseases. 
- Drinking water remains a serious issue for this households as well as access to fruits, meat and milk. |
| Fayzobod, Vahdat, Varzob (48%) | Remittances and pensions are the main incomes. 
- Expenditures on health care and drugs are high. 
- Half of the families do not have food stocks partly due to low harvest. 
- Poor dietary diversity: meals consist mostly of cereals/bread and tea with sugar. No meat consumed. 
- Few meals eaten daily as households take on substantive debts to acquire food and send migrants to Russia. Families also sell more animals to make ends meet and seek employment. |
| Jirgatol, Nurobod, Tojikobod, Tavildara, Rasht (33%) | Main shocks are high food prices, crop diseases and harvest failure as potato harvest is greatly reduced compared to normal years. 
- Poor dietary diversity especially in remote areas, lack of proteins and low number of meals (less than 2 per day even for young children). 
- Livestock owned reduced compared to last year due to more selling than usual to cope with difficult economic situation. High reliance on credit from relatives and on barter. 
- Low stocks of wheat flour and oil. 100% of the households will not be able to build sufficient food stocks. |

Households in Muminobod/Shurobod/Khovaling (34%), Temurmalik/Danghara (32%) and Murghab (30%) are also demonstrating high levels of food insecurity.

Percentages shown above are the sum of severe and moderate food insecurity. See footnote page 4 for full methodology.
Context

Recent reports (UNDP, FEWS Net) noted the increase of prices outside and inside Tajikistan: food, fuel and other non-food items are on the rise. The increase of electricity tariffs could further add to the burden of households, especially in urban areas. Electricity rationing outside Dushanbe limits economic activities in other cities and in the regions.

The plowing campaign for winter wheat is ongoing but precipitations significantly below normal over the past three months threatens its future productivity. Although harvest in the Rasht Valley decreased, the national production of potato exceeded plans this year.

IMF data forecast for 2010 over US$2 billion remittances (second best year ever). Nonetheless, the construction sector has not yet fully recovered from the crisis.

Per capita cash income remains low (despite recent increase in pensions and Government salaries) at an average of TJS 140 (US$31) per month.

FAO figures for 2010 show that cereal production declined by at least 5% and should cover 50% of domestic utilization.

In the past three months, little assistance was provided to the households interviewed apart from school feeding, food for malnourished children and pregnant/lactating women and free health care.

The IPC report* pointed out to high risks of food insecurity in several parts of the country. The FSMS validates most of the IPC findings. Results might differ in some places as the FSMS focuses on households results.

Shocks†

Last round, 33% of the households reported that high food prices represented the main threat to their food security. Now, more than half of them cite prices as their main shock (see more on food prices on the last pages of this bulletin). Seasonal unemployment was also a main economic shock.

In addition, households reported that the lack of drinking water and irrigation water was still a serious concern for this season. The lack of precipitation in October and November has become a concern as well for the beginning of the sowing campaign and especially for winter wheat.

A significant number of households also reported illnesses and accidents of working members of their families.

Households were also asked about chronic shocks they faced in 2010 and the figure below presents the main difficulties they reported:

Coping strategies‡

Compared to last year at the same period, the coping strategy index has improved: households use harming coping strategies (like skipping entire day without eating) less frequently. But, instead of reducing their food intake, households change their eating habits (66% of the households), purchase food on credit (62%), decrease expenditures for agriculture (20%), borrow food from friends and relatives (33%) or seek alternative employment (34%).

In the most food insecure areas, households still limit their food consumption by restricting adults’ consumption in order for children to eat enough. The most vulnerable households also sold more animals than usual and jeopardized their health by reducing their expenses on drugs and health care.

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† Shocks are defined by an event that has a negative impact on food and nutrition security. Shocks can be natural or caused by human action
‡ The coping strategy index takes into account the frequency of use of the most harmful coping mechanisms such as not eating during a full day or adults restricting their consumption to allow children to eat.
Migration and remittances
Two-thirds of the interviewees did not receive remittances in the past three months. Although this might be explained by the fact that migrants had yet to come back in December, it means that the lack of remittances might have led for some to increased difficulties in procuring food and essential non-food items over the past three months. On the other hand, households in Pendjakent seemed to have received more regular remittances (75%). More than two thirds of the households receiving regular money transfers declare that remittances represent more than 50% of their total income which is an increase compared to last year. When asked what they spend remittances in priority on, 63% of the households responded food, 10% health and 10% construction.

Agriculture, livestock ownership and conditions
Wheat harvest was less than average for one third of the households in the sample, mainly due to bad climatic conditions. Last year at the same period, 20% of the households were reporting a better wheat harvest than average. Households in Qumsangir, Pandjakent, Kulob, Ghonchi, Tursunzoda, Fayzobod Temurmalik and Muminobod are the most affected by the decreased harvest.

Similarly to last year, a majority of households (92%) report that they do not sell their wheat harvest but instead use it for their own stocks and consumption.

The main constraints to cultivation of wheat but also of potatoes and vegetables are as follow:

Income and expenditures
Compared to last year, households interviewed spend less of their income on food (58% this year against 63% in October 2009). Like during the crisis in 2008, when prices of food increase above a certain level, households will decrease their food purchase as a whole or, as mentioned above, they will rely on cheaper foods. Less is spent on oil and meat for example and more is spent on wheat.

Another reason for food expenditure to be lower is that prices of non-food items and especially fuel have also pushed further up expenditures on transport and fuel (10% of households’ budget compared with 5% last year). Finally, this period coincided with several cultural and religion events as well as with the start of the school year and its associated expenses. Households still mainly buy food on credit.

Remittances account for the main income source for this round for the first time since 2008 for almost one third of the families surveyed. Daily wage labor, government salaries and revenue from selling field crops were the second most important livelihood. Government salaries and pensions amount now respectfully to an average of TJS 140 and TJS 85 (US$31 and US$19) according to the State Statistics Agency (SSA).

Since the beginning of the economic crisis pensions remain the most important second income. For households depending mainly on this livelihood, salaries are not enough to afford the minimum monthly food basket. WFP calculations show that the price of the minimum food basket (based on the World Bank/TLSS methodology) is TJS 110 (US$24.5).

It means that at a time when households are supposed to build stock, the prices of basic staple foods are out of reach for many of them. Overall, half of the people surveyed reported their economic situation as worse than last year.

Debts taken this round are of bigger amounts than last year and in August as 57% of the households who contracted debts borrowed more than TJS 500 (US$111). Most credit come from relatives and friends (53% of the credit taken) followed by banks (29%).
Food sources, food stocks and markets
As stated above, food stocks are crucial at this time of the year and are a good indicator for the food security outlook of the country. Like before the winter last year, 88% of the households have food stocks, but in Isfara, Nurobod, Fayzobod and Jilikul, a quarter to a third of the interviewees did not have any stock. Moreover, wheat stocks reported are of shorter duration than last year and expensive food items such as oil are stocked by only 62% of the households this year compared to almost 75% last year. On the other hand, potato stocks for households living in production areas seem higher than last year as harvest was good this year.

In October 2009, 63% of the households reported not having sufficient stocks for the winter. This round, 76% of the households will not be able to stock enough for the months to come. In nine districts, more than 90% of the families interviewed reported not having enough for the winter (in October 2009 only 6 districts were in such a situation). As three fourth of the stocks are bought in the market, the lack of income was the main reason for the insufficient stocks, only 7% of the households blamed it on their poor harvest. Households were getting more than two-third of their food from markets which is quite usual for the season while 20% comes from their own production.

Food consumption
At this season, food consumption is normally better as households have access to their own production in better quantities but also to a wider range of food products such as fruits and vegetables. This round confirms this tendency for most districts. The dietary diversity of the sampled households is higher than last round and similar to last year. Nonetheless, households in remote areas are showing severe lack of protein intake and their diet lack vegetables and fruits.

Nonetheless, diversity of the food is only one indicator. Quantity of meals eaten per day has, on the other hand reduced, compared to last year especially for families in Jirgatol, Temurmalik, Ghonghi and Asht districts. Three fourth of the adults and one third of the children under 5 years of age eat maximum twice a day. In Murghab, the number of meals eaten by adults per day was 1.1. More alarming, children under 5 were only eating 1.3 meals per day. Households in the Rasht Valley also showed that men, women and children were not eating more than 2 meals per day. This is reflected in the fact that 66% of the families declared having problems to satisfy their food needs in the past three months.
The households interviewed show distinct characteristics depending on their food security status. Severely food insecure households do not seem to cultivate as most of them lack manpower, land, capital and experience to grow wheat, potato, vegetables or fruits. As a result, having a garden and growing part of its annual food needs is essential to guaranty households’ food security.

Food insecure households seem to also be more affected by water shortage, both for drinking and agricultural water. The economic situation of the most food insecure households is also reported as being much worse than last year pointing toward the importance of a good economic and financial situation to remain food secure.

Outlook for the coming months (December to April)
Food security in the country during the winter will depend mostly on two factors:

- Fuel and food prices have continued to increase. It is unlikely that the situation will change in the coming months as prices traditionally increase in the winter. The impact of high prices on households’ food security at this season cannot be stressed enough: prices remain the main issue for the food access of rural households, it will be important to continue monitor prices in the coming months. The last FAO Food Outlook does not foresee a decrease in wheat prices in 2011.

- As income opportunities decrease in the winter, remittances will be determinant for households in December and in January and should be monitored closely. Without remittances, households will have to engage in selling assets or reducing essential expenses such as health and heating.

In addition, the coming months are traditionally difficult for households and should result in:

- Decreased food intake and dietary diversity as the availability of fruits and vegetables decrease and prices further increase

- Reduced economic activity for local businesses due to lack of electricity and difficult access to markets.

Finally, precipitation in the coming months should be closely monitored as the last months of 2010 saw a deficit in rain and snow at the time of wheat sowing. The Meteorological Agency Hydromet forecasts precipitations in the first quarter of the year as ‘normal’ for the season. The Ministry of Agriculture has already expressed concerns about localised droughts and the impact continued low precipitations could have for farmers and their crops.

A close look at the food markets and village shops
WFP conducted this round a survey in local markets and shops in 95 villages in all regions of the country. WFP also continues to monitor the prices of 30 food commodities in 5 major markets since 2002. The results of these surveys are presented below and on the next page and allow for a better understanding of the impact of food prices on the food security of rural households.

More food bought on credit. In the most food insecure districts, households have requested more credit than last year at the same period. Households mostly take credit as a result of low income (including low remittances) and unemployment.

Credit given to shop owners come mostly from the traders they work with and from banks and have been harder to get in the Rash Valley. Credits do not exceed 3% but 56% of the shops make at least 25% of their sales on credit.

Shop owners: ‘Prices will continue to increase’. The price increase in the past three months is mainly due to the increase of wholesale prices (or prices at the source) and to the increase of transport costs. Shop owners are unanimous: prices will continue to increase in the next four months primarily due to increases in wholesale prices, transport costs (higher fuel costs) but also to increases of taxes and storage.

Less wheat flour available. Between September and November, local wheat flour is not available in most shops. Imported flour is available but just enough to meet demand. Shops owners in Sughd, Kulob, Murghab and Jilikul noted a decreased availability of wheat flour over the past three months. Although most shops owners declare that essential food products will be available in the winter, wheat flour might be an issue in the coming months in Asht, Jilikul, Mastchoh, Aini and Qumsangir.
Markets/commodities with the largest changes
The prices of the major commodities in international prices have fluctuated a lot in 2010, most increasing in prices. Wheat prices continue to increase and the regional decrease in production to affect prices in Tajikistan. The other main factor for the increase in wheat prices is linked to the increase of fuel prices.

Prices of wheat flour for the whole country have reached their highest level since April 2008
- In Kurgan-Tyube, since October, prices of imported flour surpass the peak of August 2008.
- Prices are following a normal trend as they usually increase in the autumn when households stock-up for the winter but normally start their decrease in December as it is the case in Gharm. Prices stagnated in Dushanbe, Khorog and Khujand but continued their increase in Kurgan-Tyube.
- Per capita monthly consumption of bread is around 13kg representing over one-third of the consumer’s food basket. This helps understanding the impact of the increase of wheat prices on families.

Prices of petrol remain at their highest
- Despite a recent stagnation in Dushanbe, prices are still on the rise in Khorog (TJS 4.78/ US$ 1/liter) and in Kurgan-Tyube (TJS 4.58).
- Prices are normally expected to decrease at this season and rise again late spring but experts agree that prices will not decrease to last year level and will remain above TJS 4.5/liter during the winter.

Prices of meat are well above the average
- The price of maize used to feed animals increased and general costs of breeding animal are higher this year.
- Increase is normal at this season as demand increased for events and holidays. The evolution of prices early 2011 will tell if prices follow the seasonal trend or will remain inflated for the season.

Prices of other essential foods are also on the rise
- Prices of cotton and vegetable oils are rising in all markets but Kurgan-Tyube.
- Prices of potatoes are also increasing in Khorog and Khujand but remain in all the markets of the country under the high prices of 2008.

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The results of the FSMS bulletin feed into the IPC analysis every three months and are used by WFP and partners to better target their interventions. The methodology used for this bulletin is in line with WFP’s corporate methodology on food security assessments.

Views expressed hereby are those of the authors only.