Initial Market Price Bulletin for the month of April 2017 (Reported in May 2017)

**HIGHLIGHTS:**
- **Wheat:** The current average wheat price in main cities’ markets of Afghanistan (AFN 23.5/Kg) is slightly lower by 3.0% compared to the same time last year (April 2016), but negligibly higher by 3.7% compared to the last 5-year average price of the same months (Aprils 2012 - 2016).
- **Wheat flour (High Price)** The current retail price (AFN 27.6/kg) is slightly lower by 3.7% compared to the same month last year (March 2016), and negligibly lower by 1.0% compared to the last 5-year average price of the same months.
- **Rice** is considered as the 2nd main staple food in Afghanistan. The current average retail price of Low Quality Rice (AFN 44.1/kg) is slightly higher by 8.3% compared to the same month last year (April 2016), and slightly higher by 7.2% compared to the last 5-year average price of the same months. The current average price of High Quality Rice (AFN 81.1/kg) is slightly higher by 5.3% compared to the same month last year (April 2016), and slightly higher by 5.2% compared to the last 5-year average price of the same months.
- **Sugar and Pulses** as important energy contributors of Afghan’s diet after staples and oil, prices are significantly higher from last year, 2 year back and long term average of the same month.

**Terms of Trade (ToT)**

**Casual Labor and Wheat (ToT):** The Terms of Trade (ToT) between casual Labor and wheat is a proxy indicator or the purchasing capacity of households mainly relying on casual labor as main income, and purchase of wheat in the market. This ToT reveals how many Kilograms of wheat can be purchased with one-day casual unskilled labor wage, but does not say how many days a month a laborer can get to cover the family food needs.

Labor wage/Wheat average ToT for the reporting month was 13.1 Kgs of Wheat. On average, this ToT negligibly improved (by 1.3%) from March to April 2017, mainly due to negligible decreased wheat price by 0.6% and increased labor wage by 0.5%. The variations in all main city markets were within normal range 0.0% to 4.3%). In the last three proceeding years, this improvement was experienced in:

- March to April 2016 (by 6.1%)
- March to April 2015 (by 10.6%)

While deteriorated only during:
- March to April 2014 (by 1.5%)

- In comparison to the same month one year ago (April 2016), this ToT significantly improved by 16.1%, mainly due to increased labor wage (by 13.4%) as well slightly decreased of wheat price (by 3.0%).
- On the two-year comparison (April 2015), this ToT slightly improved by 8.7%.
- Compared to the 5-year average of the same months (Aprils 2012-2016), this ToT negligibly deteriorated by 1.6%.

**Casual Labor and High Price Wheat flour (ToT):** The Terms of Trade (ToT) between casual Labor and High Price Wheat Flour is a proxy indicator or the purchasing capacity of households mainly relying on casual labor as main income, and purchase of Wheat Flour in the market. This ToT reveals how many Kilograms of Wheat Flour (HP) can be purchased with one-day casual unskilled labor wage, but does not say how many days a month a laborer can get to cover the family food needs.

Labor wage/Wheat flour (HP) average ToT for the reporting month was 11.2Kgs of Wheat flour which slightly improved (by 3.0%) from March to April 2017, mainly due to negligible decreased Wheat flour price by 2.6% and increased labor wage by 0.5%. The highest improvement only occurred in Faizabad (11%) due to increase in labor wage due to weather improvement for work. While the variation all other markets was within normal range (-1.0 to 4.3%).
In the last three proceeding years, this improvement was experienced in;

- March to April 2016 (by 2.9%)
- March to April 2015 (by 10.4%)

While deteriorated only during;

- March to April 2014 (by 0.2%)

- Compared to the same month one year ago (April 2016), this ToT significantly improved by 18.0%, mainly due to increased labor wage (by 13.4%) and decreased wheat flour price (by 3.7%).
- On the two-year comparison (April 2015), this ToT significantly improved by 11.6%.
- Compared to the 5-year average of the same months (April 2012 - 2016), this ToT negligibly improved by 2.8%.

**Sheep and Wheat (ToT):** The Terms of Trade between a one year old female sheep and Wheat is a proxy for the purchasing capacity of those households mainly relying on income from livestock (pastoralists). It says how many kilograms of Wheat can be obtained when selling a one year old female sheep.

Sheep/Wheat average ToT for the reporting month was 269 Kgs of wheat against one-year alive female sheep, which slightly improved by 2.7% from March to April 2017, mainly due to increased sheep price (by 1.5%) and decreased of wheat price by 0.6%. The highest improvement occurred in Hirat (10.9%) and in Kandahar (9.9%) due to increase in sheep price and a deterioration has been occurred in Faizabad by 9.9% due to decrease of sheep price. While the variation all other markets was within normal range (0.0% to 3.8%).

In the last three proceeding years, this improvement was experienced in;

- March to April 2016 (by 2.2%)
- March to April 2015 (by 2.5%)
- March to April 2014 (by 1.2%)

- Compared to the same month one year ago (April 2016), this ToT significantly improved by 13.7%, which is mainly due to increased sheep price (by 12.1%) and decreased wheat price by 3.0%.
- On the two-year comparison (April 2015) this ToT significantly improved by 11.8%.
- Compared to 5-year average of the same months (April 2012 - 2016), this ToT negligibly improved by 4.1%.

**Sheep and High Price Wheat flour (ToT):** The Terms of Trade between a one year old female sheep and High Price Wheat Flour is a proxy for the purchasing capacity of those households mainly relying on income from livestock (pastoralists). It says how many kilograms of Wheat Flour (HP) can be obtained when selling a one year old female sheep.

Sheep-Wheat flour (HP) average ToT for the reporting month was 229 Kgs of Wheat flour against one-year alive female sheep, which slightly improved by 4.0% from March to April 2017, mainly due to decreased of wheat flour by 2.6% and increased sheep price by 1.5%. The highest improvement in Kandahar by 11.3%, Hirat 8.4% and Jalalabad 5.7% due to due to increase in sheep price. While the variation all other markets was within normal range (-3.4 to 4.3%). In the last three proceeding years, this improvement was experienced in;

- March to April 2015 (by 0.3%)
- March to April 2014 (by 2.4%)
While deteriorated only during;
  o March to April 2013 (by 1.0%)

• Compared to the same month one year ago (April 2016), this ToT significantly improved by 15.5%, mainly due to increased sheep price (by 12.1%) and decreased wheat flour price (by 3.7%).
• On the two-year comparison (April 2015), this ToT significantly improved by 14.6%.
• Compared to 5-year average of the same months (Aprils 2012 - 2016), this ToT slightly improved by 7.9%.

Retail Price of Wheat Grain in Main Urban Cities:
The monthly average price of Wheat in main cities’ markets of Afghanistan was AFN 23.5/Kg in April 2017. Compared to the past month (March 2017), the average price negligibly decreased by 0.6%. The variation in all main cities was within a normal range (-2.6% to 0%). In the last three proceeding years, this price decrease was experienced in;
  o March to April 2016 (by 1.3%)
  o March to April 2015 (by 1.9%)
While the price increased during;
  o March to April 2014 (by 3.1%)

• Compared to the same month one year ago (April 2016), the average wheat price slightly decreased by 3.0%. The highest decrease only occurred in Nili (12.1%), which was mainly due to increased supply of local wheat from nearby provinces and imported wheat from Kazakhstan. The variation in other main cities was within a normal range (-7.7% to 7.0%).
• On the two-year comparison (April 2015), the average price negligibly decreased by 1.0%.
• Compared to the last 5-year average price of the same months (Aprils 2012 - 2016), the average price negligibly increased by 3.7%.

Retail Price of Wheat flour in Main Urban Cities:
Wheat flour (High Price):
The monthly average price of Wheat flour (High Price) in main cities’ markets was AFN 27.6/Kg in the reporting month (April 2017). The average price slightly decreased by 2.6% compared to the previous month (March 2017). The highest decrease only occurred in Faizabad (by 5.9%), which was mainly due to increased supply of imported wheat flour. The variation in all main cities was within a normal limit (-4.2% to 1.0%). In the last three proceeding years, this decrease was experienced only in;
  o March to April 2015 (by 1.5%)
While the price increased during;
  o March to April 2016 (by 0.6%)
  o March to April 2014 (by 2.1%)
• Compared to the same month last year (April 2016), the current average price negligibly decreased by 3.7%. The highest decrease only occurred in Kabul (by 11.6%), which was mainly due to increased supply of imported wheat flour compared to the same time one year ago. The variation in all other remaining main cities was within a normal range (-7.4% to -3.6%).

• Compared to the same month two years ago (April 2015), the average price of wheat flour negligibly decreased by 1.9%.

• Compared to 5-year average price of the same months (April 2012 - 2016), the average price negligibly decreased by 1.0%.

Wheat flour (Low Price):
The monthly average price of Wheat flour (Low Price) in main cities’ markets was AFN 24.9/Kg in the reporting month (April 2017). The average price negligibly decreased by 1.6% compared to previous month (March 2017). The highest decrease only occurred in Kabul (by 5.0%) due to increased supply. The variation in all main cities was within a normal range (-4.5% to 2.4%). In the last three proceeding years, this decrease was experienced only in;

  • March to April 2015 (by 0.8%)
  While the price increased during;

  • March to April 2016 (by 0.8%)
  • March to April 2014 (by 1.9%)

• Compared to the same month one year ago (April 2016), the current average price negligibly decreased by 2.7%. The highest decrease only occurred in Maimana (by 12.5%) due to increased supply of wheat flour, while the variation in other remaining main cities was within a normal range (-7.1% to 6.7%).

• Compared to the same month two years ago (April 2015), the average price negligibly decreased by 2.4%.

• Compared to 5-year average price of the same months (April 2012 - 2016), the average price negligibly increased by 0.5%.

Retail Price of Rice in Main Urban Cities:

Rice (High Quality):
• The monthly average price of Rice (High Quality) in main cities’ markets was AFN 81.1/Kg in the reporting month (April 2017) which negligibly increased by 1.9% compared to the previous month (March 2017). The largest increase occurred in Kandahar and Maimana (5.4%), mainly due to temporary decreased supply from source points (Pakistan and India), while the variation in other remaining main cities was within a normal range (-0.6% to 4.8%). In the last three proceeding years, this increase was experienced only in;

  • March to April 2014 (by 1.6%)
While the price decreased during;

  • March to April 2015 (by 2.4%) and remained unchanged in March to April 2016.

• Compared to the same month one year ago (April 2016), the average price negligibly increased by 5.3%. The largest increase occurred in Hirat (20.0%), Kandahar (16.8%) and Maimana (10.7%), mainly due to decrease of supply. The variation in all main cities was within a normal range (-6.3% to 6.4%).

• Compared to the same month two years ago (April 2015), the average price negligibly increased by 1.2%.

• Compared to 5-year average price of the some months (April 2012 - 2016), the average price negligibly increased by 5.2%.

Rice (Low Quality):
• The monthly average price of Rice (Low Quality) in main cities’ markets was AFN 44.1/Kg in the reporting month (April 2017), which slightly increased by 1.8% compared to the previous month (Mach 2017). The largest increase occurred in Maimana (8.1%) and Kandahar (7.3%), mainly due to decreased supply of low quality rice from Pakistan. The variation in all main cities was within a normal range (0.0% to 2.0%).

In the last three proceeding years this increase was experienced only in;
  - March to April 2014 (by 0.2%)
  - March to April 2016 (by 0.4%)
  - March to April 2015 (by 1.5%)

• Compared to the same month one year ago (April 2016), the average price slightly increased by 8.3%. The largest increase occurred in Hirat (15.8%), Kandahar (13.3%) and Faizabad (11.8%), mainly due to decreased supply of low quality rice from Pakistan this year. The variation in all main cities was within a normal range (0.0% to 8.3%).

• Compared to the same month two years ago (April 2015), the average price significantly increased by 14.4%.

• Compared to 5-year average price of same months (Aprils 2012 - 2016), the average price slightly increased by 7.2%.

Retail Price of Cooking Oil in Main Urban Cities:

The monthly average price of cooking oil in main cities’ markets was AFN 81.6/Kg in the reporting month (April 2017), being negligibly decreased by 0.7% compared to previous month (March 2017). The variation in all main cities was within a normal range (-4.7% to 1.3%). In the last three proceeding years this decrease was experienced only in;
  - March to April 2015 (by 1.0%)

While the price decreased during;
  - March to April 2016 (by 1.5%)
  - March to April 2015 (by 0.1%)

• Compared to the same month one year ago (April 2016), the average price slightly increased by 4.3%. The largest increase occurred in Nili (13.3%), main reason for the increase was increased price of oil by the traders and decreased supply of oil from source points. The variation in all other main cities was within a normal limit (6.5% to 9.6%).

• Compared to the same month two years ago (April 2015), the average price slightly increased by 7.3%.

• Compared to 5-year average of the same months (Aprils 2012 - 2016), the average price negligibly increased by 2.5%.

Retail Price of Pulses, Salt, Sugar and No. of days averagely worked by a labourer:

Pulses: The monthly average price of Pulses in April 2017 in main cities’ markets was AFN 85.3/Kg negligibly increased by 1.2% from last month (March 2017). The largest increase only occurred in Maimana (by 8.9%), mainly due to decreased supply. The variation in all other main cities markets was within a normal range (-2.9 to 4.3%).

• Compared to the same time last year (April 2016), the price of pulses significantly increased by 25.2%, the highest increase occurred in Jalalabad (51.9%), followed by Kandahar (27.4%), Mazar (27.0%), Faizabad (25.1%), Hirat (22.5%), Kabul (20.8%), Nili (18.4%) and Maimana (16.7%) mainly due to decreased supply from Pakistan.

• Compared to the same time two years ago (April 2015), the price of pulses significantly increased by 43.7%.

• Compared to 5-year average of the same months (Aprils 2012 - 2016), the prices of pulses increased significantly by 40.5%.

Salt: The monthly average price of Salt in April 2017 in main cities’ markets was AFN 14/Kg which is remained unchanged compared to the previous month (March 2017). The current average price of salt negligibly increased by 0.5% compared to the same month last year (April 2016), and slightly increased by 6.8% compared to the same month two years ago (April 2015).
Sugar: The monthly average price of Sugar in April 2017 in main cities’ markets was AFN 55/Kg, being negligibly decreased by 1.7% compared to the previous month (April 2017). The highest decrease only occurred in Kabul (11.0%), mainly due to increased supply. The current average price of Sugar significantly increased by 20.0% compared to the same month last year (April 2016), and by 33.3% compared to the same month two year ago (April 2015) due to increased price in source points.

Number of days averagely worked by a labourer: The monthly average number of days worked by a laborer during April 2017 was reported at 11.1 days. The highest number of working days was in Jalalabad and Kabul (14 days) followed by Kandahar, Hirat and Nili (12 days), Mazar and Maimana (8 days), while it was least in Faizabad (4 days). Compared to the previous month (March 2017), the average number of days worked increased by 13.4%, significant increase occurred in Kabul by 35.7% (10 days), Nili 71.4 % (5days) and Faizabad 14.3% (0.5 days), the variation in other main cities remain unchanged.
- Compared to the same month last year (April 2016), the average number of working days in a month decreased by 1.7% (0.2day), decreased in Nili and Hirat 25 % (4 days) and Faizabad 11.1% (0.5 day) and increased in Kandahar by 50 % (4days) and Kabul 18.8 % (4 days). The variation in other main cities was zero.
- Compared to the same month two years ago (April 2015), the average number of working days for main cities decreased by 9.2% (1.1 days).

Market Watch:

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Source: WFP/VAM market data from Afghanistan main cities (Kabul, Kandahar, Mazar, Jalalabad, Faizabad, Hirat, Maimana and Nili)

Vulnerability Analysis and Mapping (VAM) – World Food Programme (WFP), Afghanistan