FAO-WFP Food Security & Livelihood Assessment
August - September 2022 - Round 4

Preliminary Findings
11 October 2022
### August / September 2022 Survey Reach

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- 3,725 interviews collected via CATI between 7 August and 15 September
- Representative at state/region level; small sample achieved in Chin, Kayah
- Results weighted by demographics, engagement in agriculture, wealth proxy (education)
Indicators for Food Security Outcomes

• Food Consumption Score (FCS), 7 day recall
• Reduced Coping Strategies Index (rCSI), 7 day recall
• Livelihood-based Coping Strategies Index (LCSI), 30 day recall
  + main income source and income change → computation of the remote Consolidated Approach for Reporting Indicators of Food Security (rCARI)
• Food Insecurity Experience Scale (FIES), 30 day recall
Overall Food Security Situation (CARI and FIES)

- **Deteriorating trend** since last year, accounting for seasonality
- **Overall, 15.2 million people food insecure** (severely and moderately, including 1.3m IDPs), an increase from 13.2 million last year

**Recent Food Insecurity**

- **R2**: 31% (mod+sev), 2% (sev), 2% (mod), 2% (marg), 2% (sev)
- **R3**: 22% (mod+sev), 2% (sev), 2% (mod), 2% (marg), 2% (sev)
- **R4**: 29% (mod+sev), 2% (sev), 2% (mod), 2% (marg), 2% (sev)

Aug/Sep 2021: 24% (sev), 56% (mod), 1% (marg), 1% (sec)
Mar/Apr 2022: 19% (sev), 51% (mod), 1% (marg), 1% (sec)
Aug/Sep 2022: 25% (sev), 49% (mod), 2% (marg), 2% (sec)
Food Consumption and Reduced Coping Strategy Index (rCSI)

- Deterioration in food consumption from previous rounds to Aug/Sep 2022
- Quality of diets worsened; less protein rich foods consumed
Livelihood Coping Strategies

- Use of coping strategies increased from Apr/May 2022 to similar levels as in Aug/Sep 2021.
- Emergency coping increased (high risk jobs, migrated household, sold last working animals, mortgaged/sold house or land).
  - 18% of agricultural households consumed seed (compared to 23% in R2 and 15% in R3)
  - 10% sold last draught animals (compared to 7% in R2 and 6% in R3)
Food Consumption Indicators

livelihood-based Coping Strategy Index

- Emergency
- Crisis

Emergency
Crisis
Income Change

- A lot more (>50%)
  - Aug/Sep 2021: 3%
  - Apr/May 2022: 2%
  - Aug/Sep 2022: 1%

- More
  - Aug/Sep 2021: 11%
  - Apr/May 2022: 15%
  - Aug/Sep 2022: 14%

- Same
  - Aug/Sep 2021: 19%
  - Apr/May 2022: 24%
  - Aug/Sep 2022: 23%

- Less
  - Aug/Sep 2021: 18%
  - Apr/May 2022: 28%
  - Aug/Sep 2022: 33%

- A lot less (<50%)
  - Aug/Sep 2021: 48%
  - Apr/May 2022: 31%
  - Aug/Sep 2022: 28%
Main Shocks

Sickness/death in the HH, loss of employment and high food prices are all associated with both moderate and severe food insecurity.

Although less frequent, drought and violence/conflict are associated with food insecurity.

Conflict as a main shock higher in: Chin 38%, Kayah 42%, Sagaing 23%
Who are food insecure?

- Rural households
- Female-headed HHs
- HHs with vulnerability to economic shocks
- HHs in conflict affected areas
- Crop producers (except those with a reduction in harvest) have a better outcome than livestock producers and non-agricultural HHs.
Recap

- **Growing food consumption gaps**, after the post-harvest period recorded in the previous round
- **Deteriorating asset depletion**, impeding vulnerable households to bounce back to sustainable livelihoods
- **Conflict and displacement** increasing in many areas
- **Worsening market access** and **rising food and fuel prices**
Slight improvement for cash croppers, since R3, but also a slight deterioration for staple producers…. But main income source is decreasing.
- Decrease in area planted since the last year.
- The retrenchment is slightly more pronounced among rice and cash crop producers.
- Associated with violence/conflict (t-tested).
- In fact, most frequent in Rakhine.

**MAIN CROPS AND AREA PLANTED**

- **Area Retrenchment**
  - R2 (Aug.-Sept 2021): 8% Less, 8% A lot less, 15% Total (% farmers with drop in area)
  - R3 (Apr.-May 2022): 13% Less, 10% A lot less, 20% Total
  - R4 (Aug.-Sept 2022): 17% Less, 6% A lot less, 23% Total

- **Farmers with Drop in Area Farmed**
  - 22% not affected by violence/conflict
  - 32% affected by violence/conflict

- **Area Drop by State/Region**
  - Ayeyarwady: 19%
  - Bago: 22%
  - Chin: 16%
  - Kachin: 17%
  - Magway: 24%
  - Mandalay: 19%
  - Mon: 12%
  - Rakhine: 40%
  - Sagaing: 25%
  - Shan: 22%
  - Tanintharyi: 20%
  - Yangon: 31%
Similar challenges in crop production, compared to previous rounds: access to fertilizer still a problem, but also below-average rainfalls and lack of fuel. Especially in Rakhine and Yangon.

Some difficulties are more specific to the crops: For example,

- challenges to access to fertilizer are more pronounced for cereal producers;
- accessing labour was a more frequent problem for vegetables and fruit producers;
• Below normal harvest (particularly for rice)
• Effect of land size

CROP PRODUCTION DIFFICULTIES AND HARVEST

- Harvest compared to typical year
- Plant diseases

% rice farmers reporting drop in harvest

- <1 ha: 60%
- 1-2 ha: 56%
- >2 ha: 55%

plant diseases

- <1 ha: 12%
- 1-2 ha: 9%
- >2 ha: 4%

R2
R3
R4

Rice
other cereals
vegetables and pulses
fruit
Nuts (groundnuts, cashew, sesame, bambara…)
cash crops

- a lot more
- more
- same
- less
- a lot less

- <1 ha
- 1-2 ha
- >2 ha

drop in harvest

- 26%
- 30%
- 38%

- 19%
- 19%
- 16%

- 45%
- 49%
- 54%

- 38%
- 32%
- 36%
- 39%
- 36%
- 34%

- 23%
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- 26%
- 22%
- 16%

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- 8%
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- 1%

- 38%
- 32%
- 36%
- 39%
- 36%
- 34%

- 32%
- 36%
- 39%
- 36%
- 34%
- 34%
Rakhine is where the worst production outcome occurred.

Harvest by state/region:

- A lot more: 5% (Rakhine), 16% (Bago), 19% (Kachin), 22% (Mandalay), 33% (Mon), 15% (Sagaing), 13% (Shan), 15% (Tanintharyi), 11% (Yangon)
- More: 24% (Rakhine), 45% (Bago), 37% (Kachin), 29% (Mandalay), 50% (Mon), 33% (Sagaing), 33% (Shan), 24% (Tanintharyi), 38% (Yangon)
- Same: 15% (Rakhine), 40% (Bago), 33% (Kachin), 33% (Mandalay), 41% (Mon), 41% (Sagaing), 33% (Shan), 15% (Tanintharyi), 15% (Yangon)
- Less: 13% (Rakhine), 20% (Bago), 18% (Kachin), 19% (Mandalay), 13% (Mon), 14% (Sagaing), 14% (Shan), 11% (Tanintharyi), 11% (Yangon)
- A lot less: 33% (Rakhine), 16% (Bago), 18% (Kachin), 22% (Mandalay), 5% (Mon), 24% (Sagaing), 15% (Shan), 15% (Tanintharyi), 11% (Yangon)
One of the coping strategies recorded, the sale of the last traction animal or motor tiller. It is difficult to assess whether this is a cause or an effect of a decrease in harvest. But of course they are associated.

A decrease in harvest is associated with ALL food security indicators.

In addition:

- A reduction of planted area among smallholder (less than 1 ha) is associated with insufficient consumption
- A decrease in herd/flock size is associated with more severe coping strategies
Decline in frequency of marketing difficulties except marketing (transportation) costs.

In the past round, difficulties in marketing were especially for cash crops and vegetables. In this round it is mainly cash crops.

Selling vegetables affected by marketing costs (as expected, these are perishable produces), low demand was frequent for cash crops.

Low prices were particularly mentioned in Mon and Bago, the higher marketing costs in Shan and the marketing losses in Sagaing.
In the previous round 42% of livestock producers experienced a decrease in herd/flock size. In R4, the share has increased to 47%. Decreases were more frequent for swine (55%) and poultry (50%)

Reasons for decrease and increase seem similar to the previous round. But:

- Animal deaths have decreased
- Selling for good prices has decreased, expect pigs (it was 12% for cattle, 13% swine and 11% poultry)
- Distress sales have increased (it was 7% for cattle, 11% swine and 8% poultry)
Overall, 46 percent of livestock producers reported difficulties (42% in R3)
Incidence of livestock diseases decreased, and market access improved, but the share of reporting difficulties accessing feed has increased, as well as issues in accessing pastures

Purchasing feed was more frequently cited by swine producers, but in R4, this was 34% for cattle, 60% swine and 29% poultry, so there is a more generalised trend
Diseases concerned mostly poultry in R3 (57%). Now, this frequency decreased for all.
Access to pasture deteriorated particularly for cattle (from 13% in R3).

Marketing conditions for livestock have not improved, mostly for the high transportation costs, but also low demand (and price) for cattle
CONCLUSIONS

Shocks and income
• Decrease in shocks related to COVID-19 restrictions, but increase reporting of food and fuel prices as a shock, as well as conflict/violence. Income still declining for most people.

Crop production
• The retrenchment of farmed area seems more pronounced among rice and cash crop producers. Planting decisions are associated with violence/conflict, and the reduction in area planted is most frequent in Rakhine.
• Similar challenges in crop production, compared to previous rounds: access to fertilizer still a problem, but also below-average rainfalls and lack of fuel. Especially in Rakhine and Yangon.
• The 2022 main rainfed production is likely below-average.
• Rakhine is where is the worst production outcome, but Chin, Magway, Sagaing, Tanintharyi and Yangon did not do well.
• Decline in frequency of marketing difficulties except marketing (transportation) costs.

Livestock production
• In the previous round 42% of livestock producers experienced a decrease in herd/flock size. In R4, the share has increased to 47%. Decreases were more frequent for swine (55%) and poultry (50%).
• Animal deaths have decreased, Selling for good prices has decreased, expect pigs, and distress sales have increased. Incidence of livestock diseases decreased, and market access improved, but the share of reporting difficulties accessing feed has increased, as well as issues in accessing pastures.
• On livestock marketing, citing a lower demand became less frequent, but increase in marketing cost, and low prices (mentioned in past rounds) have not improved.

Food security
• growing food consumption gaps, after the post-harvest period recorded in the previous round, in a context of open conflict in many areas, Worsening market access and Rising food and fuel prices.
• Deteriorating assets depletion, impeding vulnerable households to bounce back to sustainable livelihoods.
### Food Security Situation (rCARI) by State/Region

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The 2021 PIN was calculated using results from 2 surveys (FAO/WFP R2 survey + a separate WFP survey) as round 2 of the FAO/WFP survey did not cover all state/regions.

*The analysis is based on WFP’s Consolidated Approach for Reporting Indicators of food security using remote data collection (rCARI)*
# Recent Food Insecurity Situation (FIES) by State/Region

<table>
<thead>
<tr>
<th>State/Region</th>
<th>RFI (mod+sev)</th>
<th>RFI (sev)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ayeyarwady</td>
<td>24.2 (±7)</td>
<td>0.9 (±1.1)</td>
</tr>
<tr>
<td>Bago</td>
<td>25.3 (±7)</td>
<td>1 (±1.2)</td>
</tr>
<tr>
<td>Chin</td>
<td>49.7 (±14)</td>
<td>6.4 (±6.4)</td>
</tr>
<tr>
<td>Kachin</td>
<td>28.2 (±7)</td>
<td>2 (±1.9)</td>
</tr>
<tr>
<td>Kayah</td>
<td>35.3 (±12.3)</td>
<td>1.6 (±2.6)</td>
</tr>
<tr>
<td>Kayin</td>
<td>31.9 (±10.3)</td>
<td>2.8 (±3)</td>
</tr>
<tr>
<td>Magway</td>
<td>29.1 (±7.8)</td>
<td>2.3 (±2.5)</td>
</tr>
<tr>
<td>Mandalay</td>
<td>23.1 (±7.1)</td>
<td>1.6 (±1.8)</td>
</tr>
<tr>
<td>Mon</td>
<td>31.3 (±7.9)</td>
<td>0.9 (±1)</td>
</tr>
<tr>
<td>Rakhine</td>
<td>47.6 (±10.5)</td>
<td>5.3 (±4)</td>
</tr>
<tr>
<td>Sagaing</td>
<td>29.8 (±7.8)</td>
<td>2.5 (±2.4)</td>
</tr>
<tr>
<td>Shan</td>
<td>29.7 (±10.1)</td>
<td>2.1 (±2.9)</td>
</tr>
<tr>
<td>Tanintharyi</td>
<td>31 (±9.9)</td>
<td>2.8 (±3.2)</td>
</tr>
<tr>
<td>Yangon</td>
<td>29.9 (±7.4)</td>
<td>1.5 (±1.6)</td>
</tr>
</tbody>
</table>