Food and Agriculture Organization of the United Nations

World Food Programme

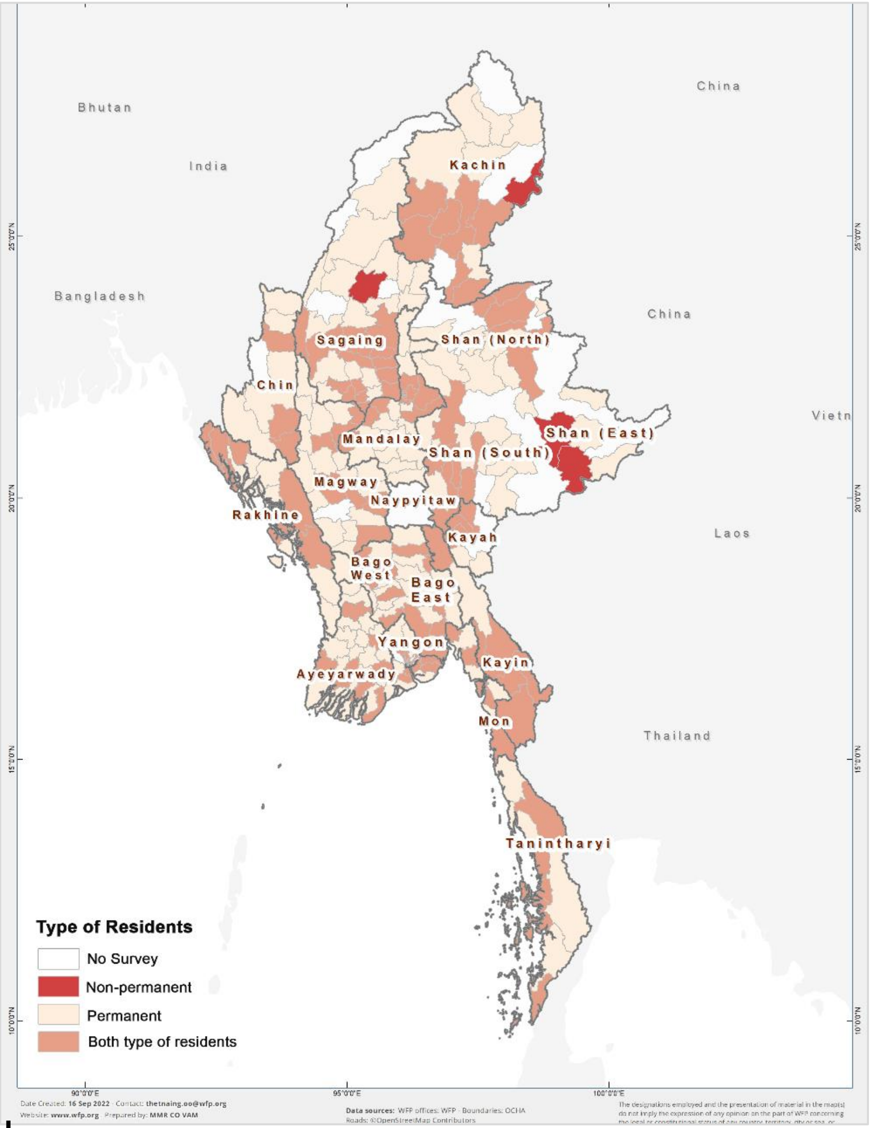
FAO-WFP Food Security & Livelihood Assessment
August - September 2022 - Round 4

Preliminary Findings

11 October 2022

August / September 2022 Survey Reach

ADM1	Target	Achieved		
		Total	Agricultural HHs	Non-Agricultural HHS
AYEYARWADY REGION	300	300	165	135
BAGO REGION	300	300	158	142
CHIN STATE	300	131	95	36
KACHIN STATE	300	300	158	142
KAYAH STATE	300	154	58	96
KAYIN STATE	300	236	80	156
MAGWAY REGION	300	300	168	132
MANDALAY REGION	300	300	147	153
MON STATE	300	300	143	157
RAKHINE STATE	300	262	121	141
SAGAING REGION	300	300	189	111
SHAN STATE	300	300	152	148
TANINTHARYI REGION	300	242	106	136
YANGON REGION	300	300	100	200
Total	**4200**	**3725**	**1840**	**1885**



- 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

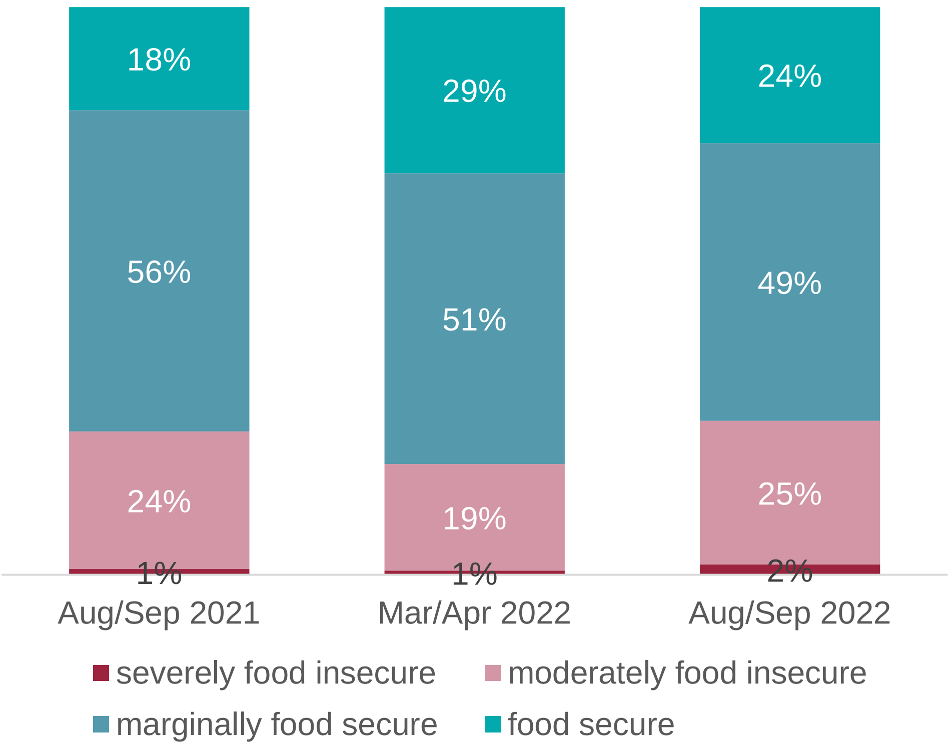
- Food Consumption Score (FCS), 7 day recall
- Reduced Coping Strategies Index (rCSI), 7 day recall
- Livelihood-based Coping Strategies Index (LCSI), 30 day recall

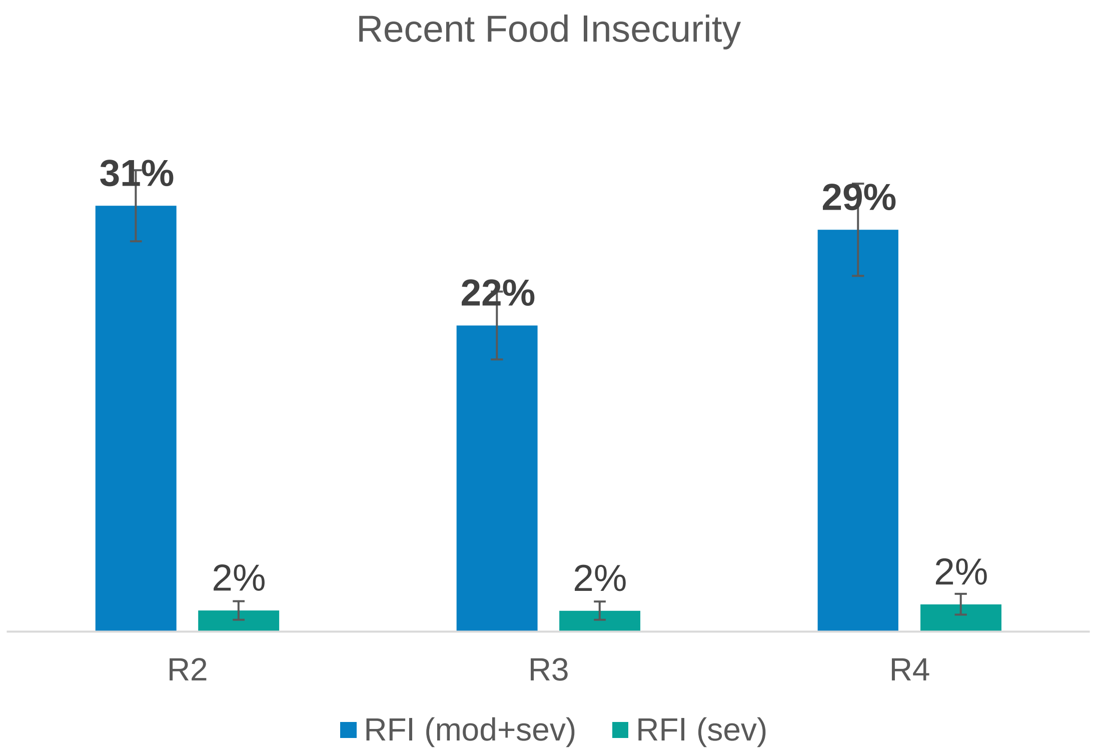
+ main income source and income change → computation of the remote Consolidated Approach for Reporting Indicators of Food Security (rCARI)

- 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





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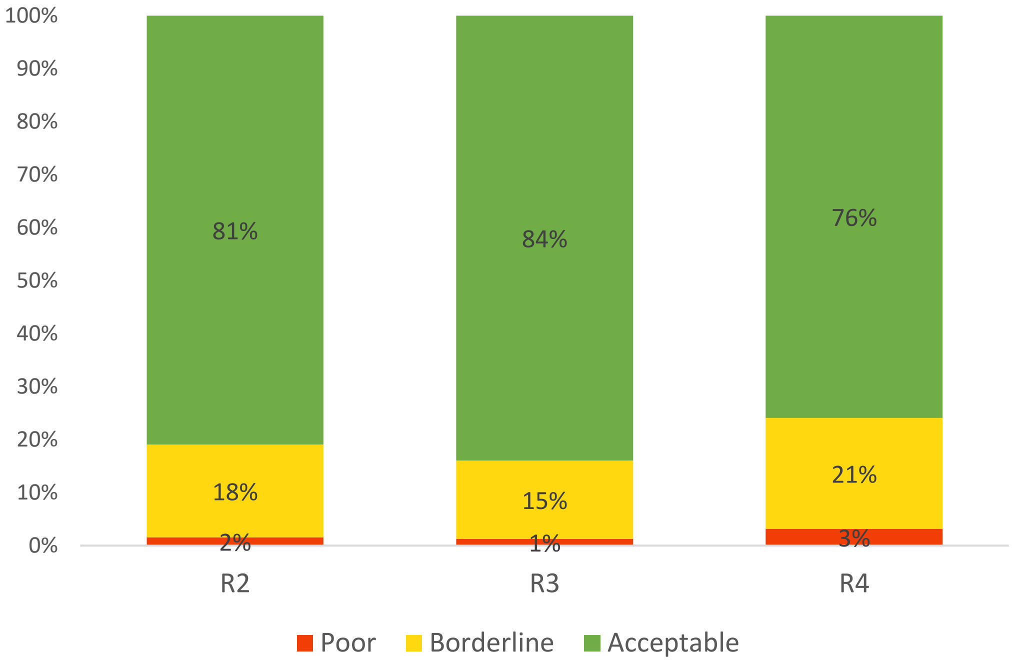
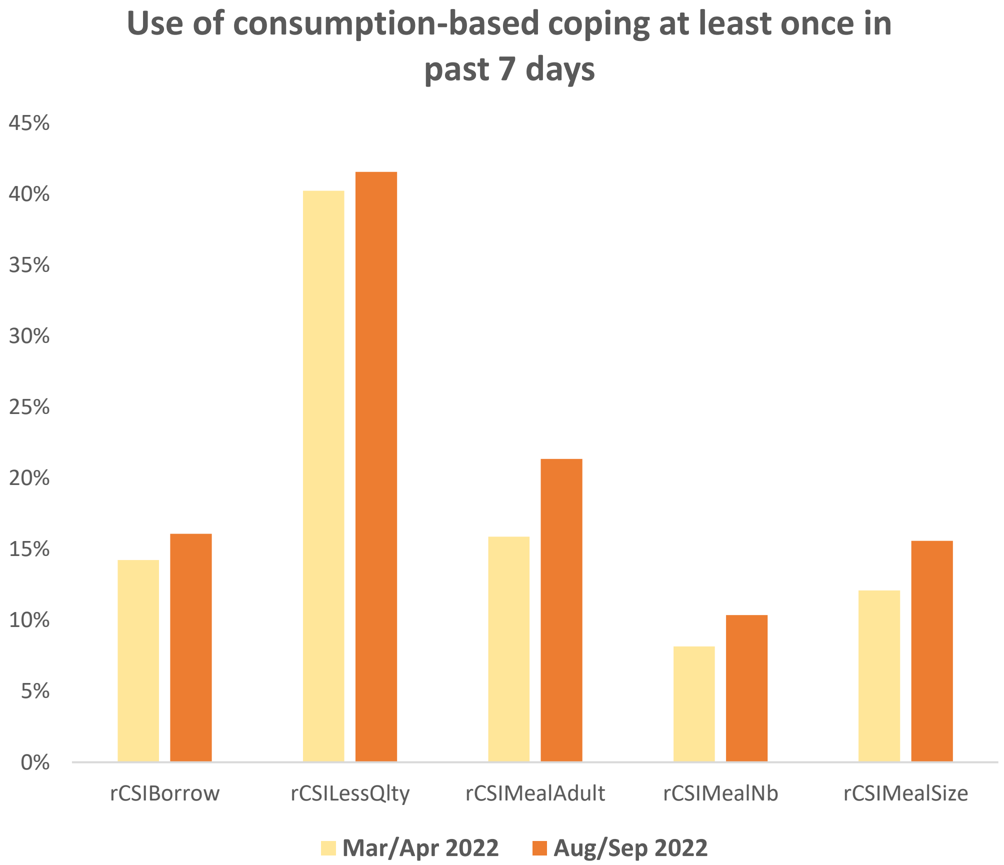
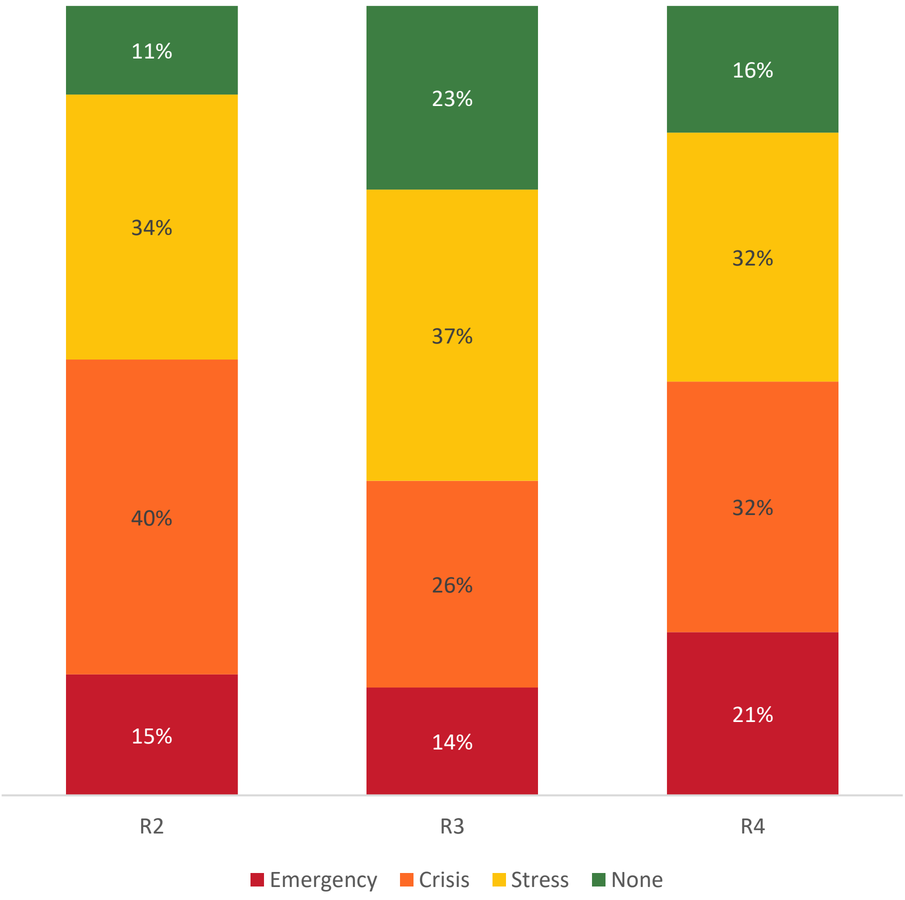
Food Consumption and Reduced Coping Strategy Index (rCSI)



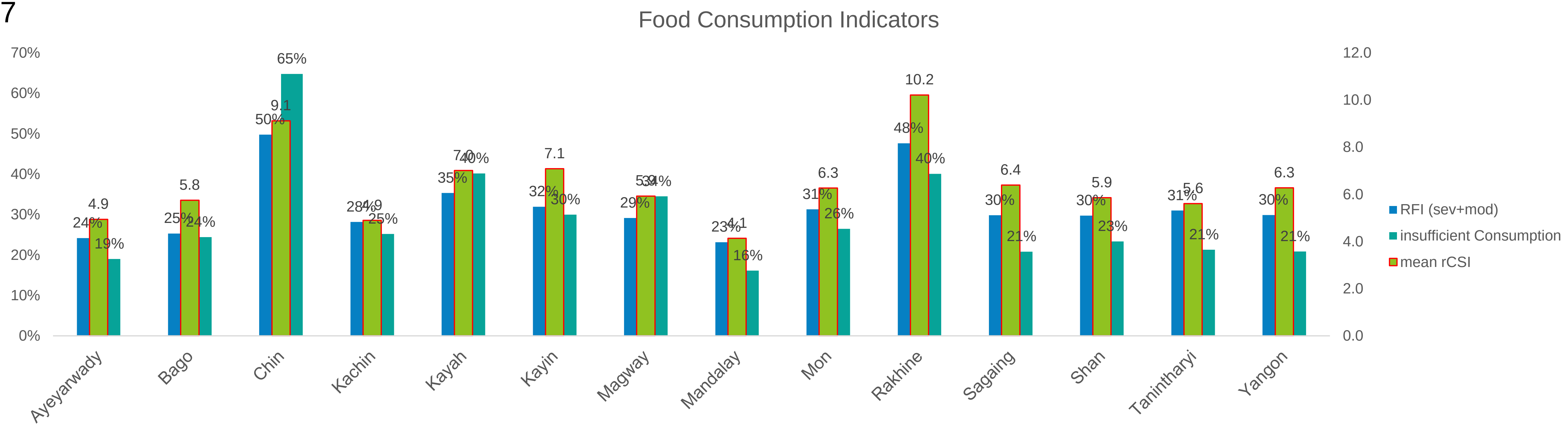


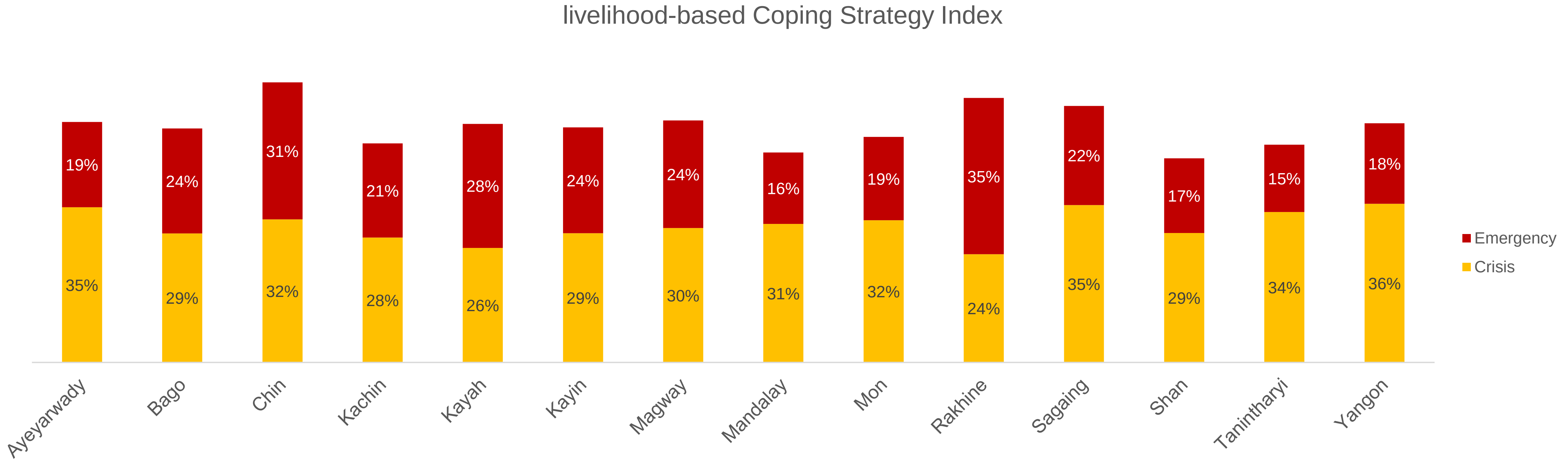
- **Deterioration in food consumption** from previous rounds to Aug/Sep 2022
- **Quality of diets worsened;** less protein rich foods consumed

Livelihood Coping Strategies

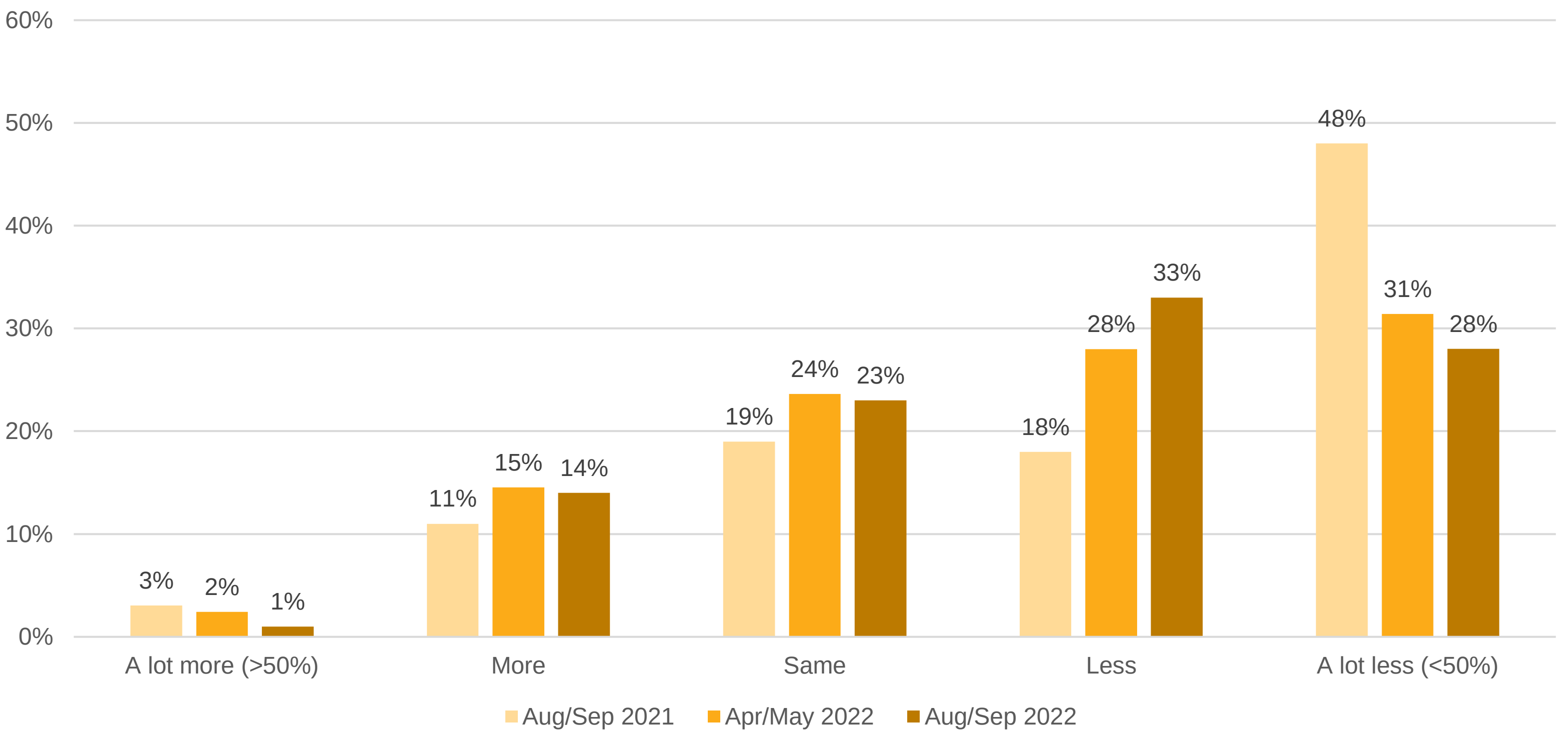


- Use of **coping strategies** **increased** from Apr/May 2022 to similar levels as in Aug/Sep 2021.
- **Emergency coping** **increased** (high risk jobs, migrated household, sold last working animals, mortgaged/sold house or land).
  - 18% of agricultural households consumed seed (compared to 23% in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


Food Consumption Indicators
RFI (sev+mod)
insufficient Consumption
mean rCSI
Ayeyarwady
Bago
Chin
Kachin
Kayah
Kayin
Magway
Mandalay
Mon
Rakhine
Sagaing
Shan
Tanintharyi
Yangon


livelihood-based Coping Strategy Index
Emergency
Crisis
Ayeyarwady
Bago
Chin
Kachin
Kayah
Kayin
Magway
Mandalay
Mon
Rakhine
Sagaing
Shan
Tanintharyi
Yangon

Income Change

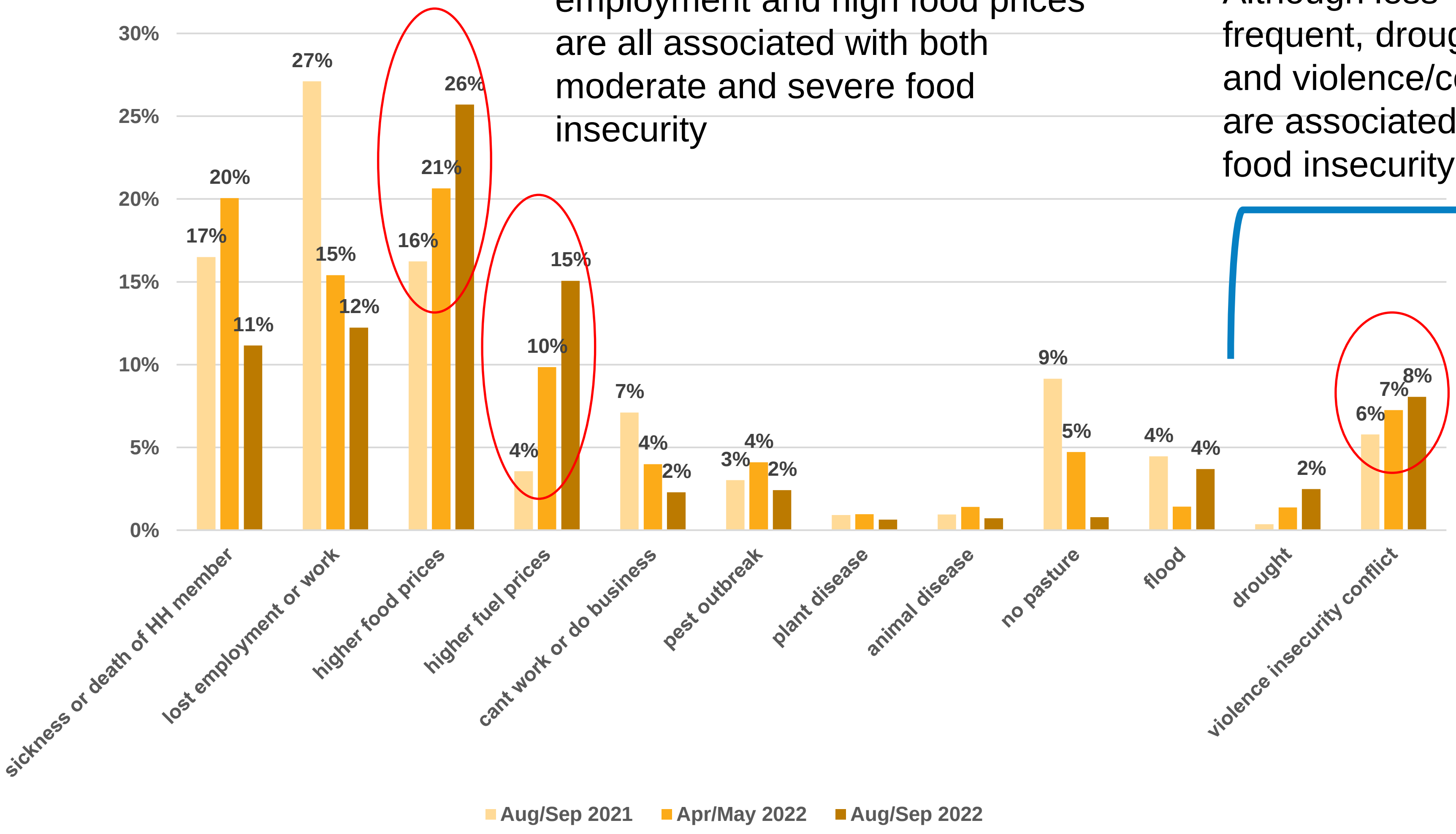


Main Shocks

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

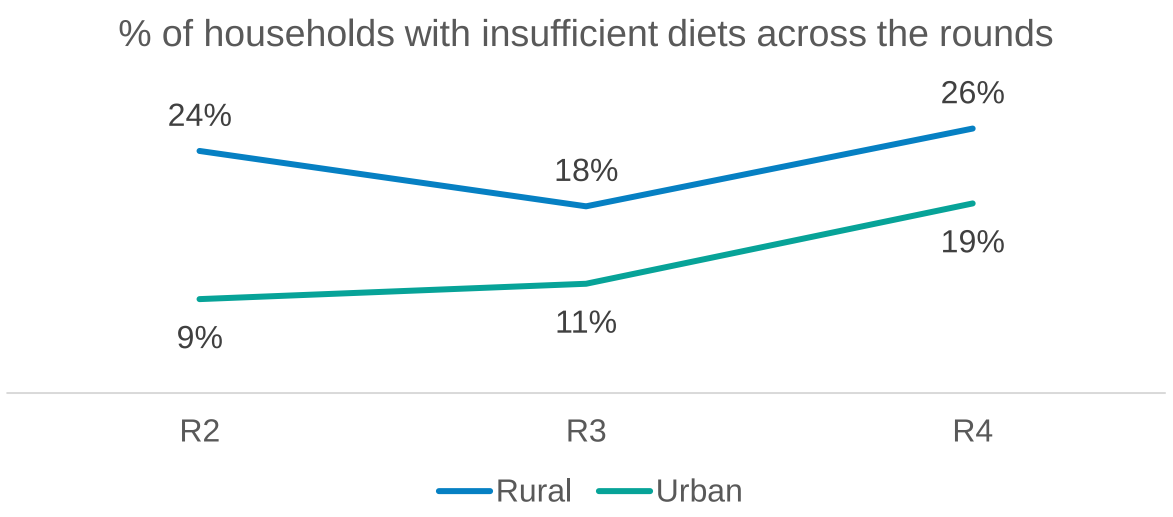
Although less frequent, drought and violence/conflict are associated with food insecurity

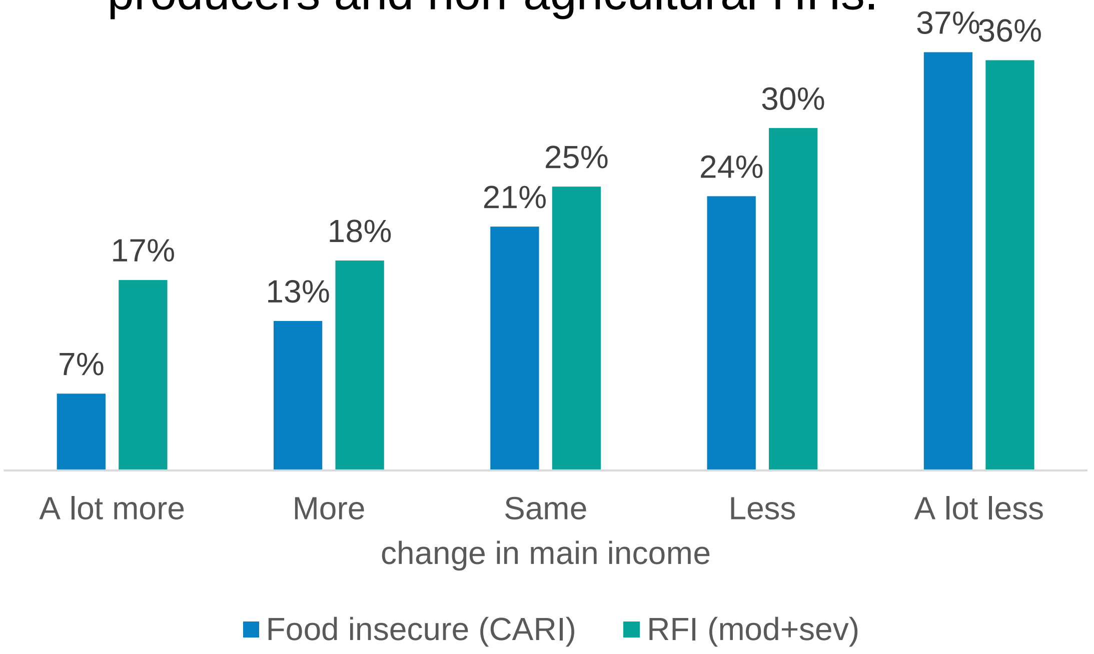
Conflict as a main shock higher in: Chin 38%, Kayah 42%, Sagaing 23%

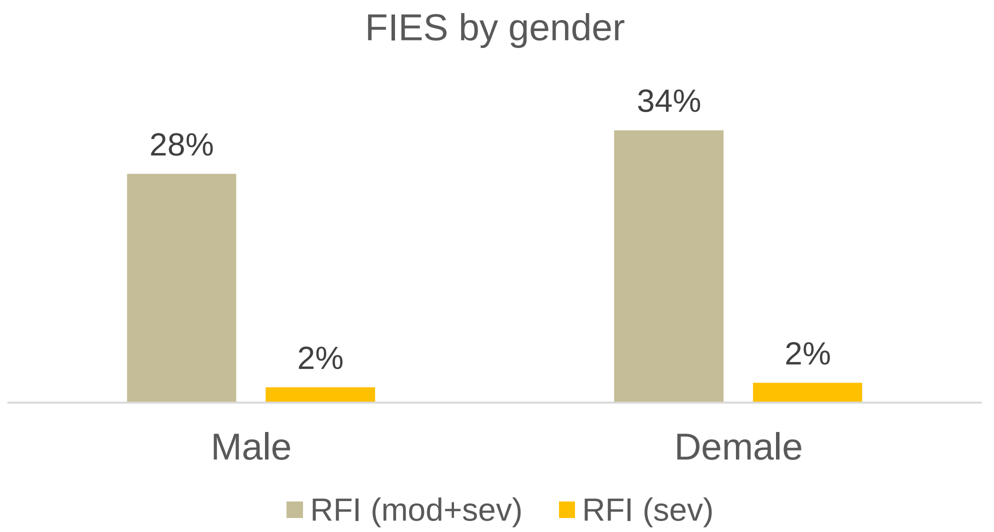


Who are food insecure?

- 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.



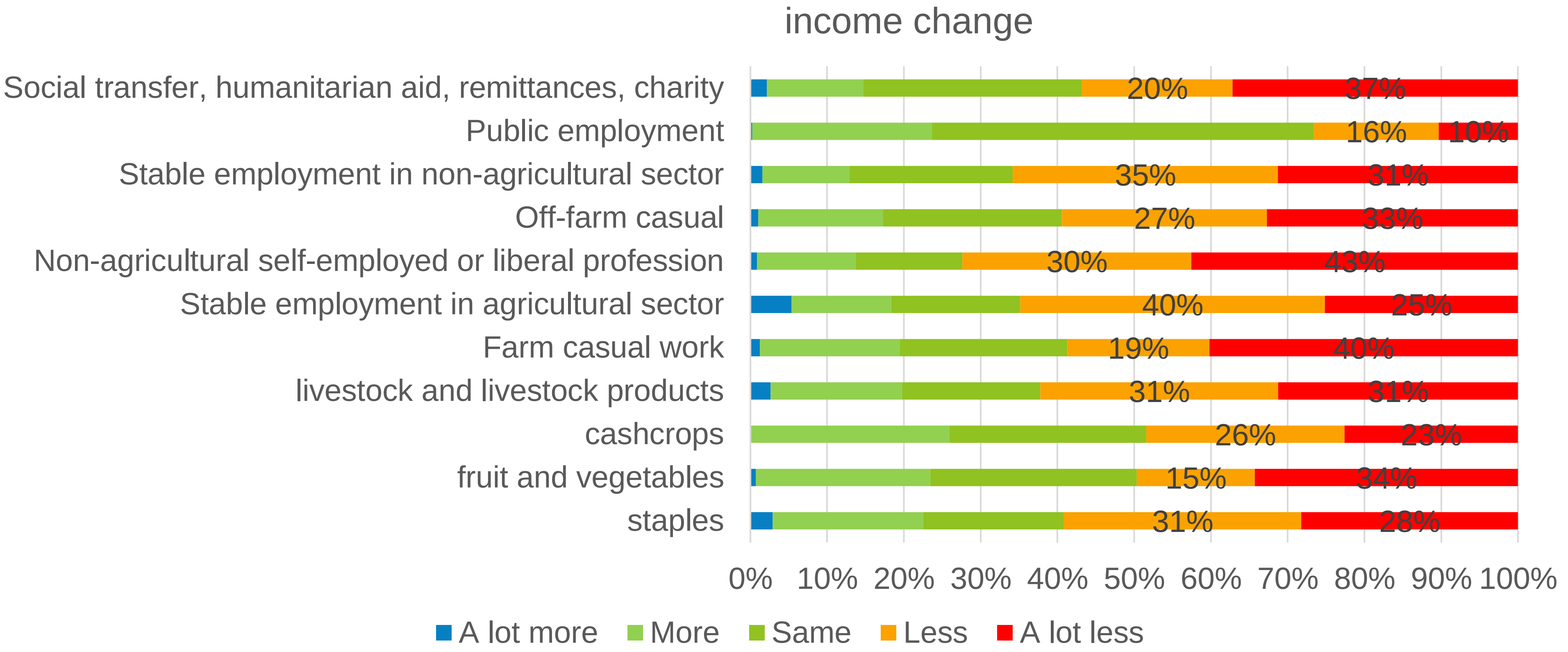




Recap

- **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**

INCOMES



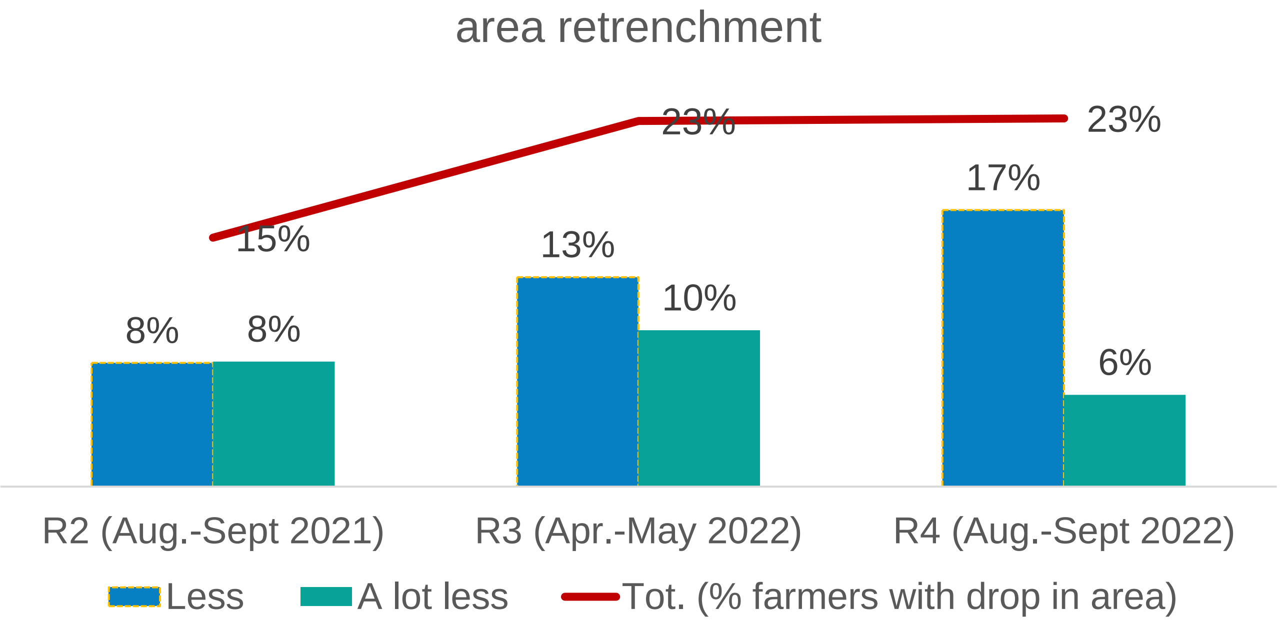
- Slight improvement for cash croppers, since R3, but also a slight deterioration for staple producers…. But main income source is decreasing

Households reporting a drop in main source of income

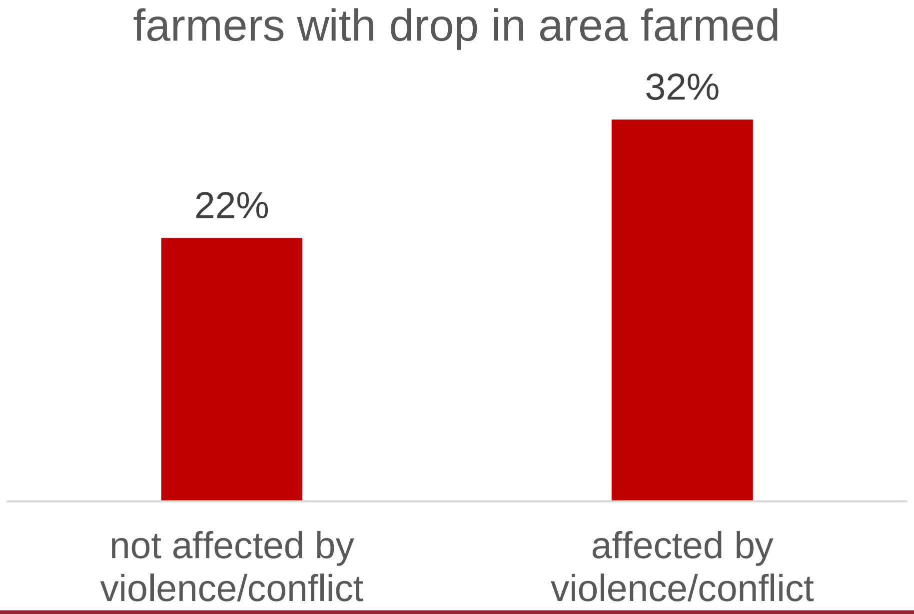
> 40 - 60

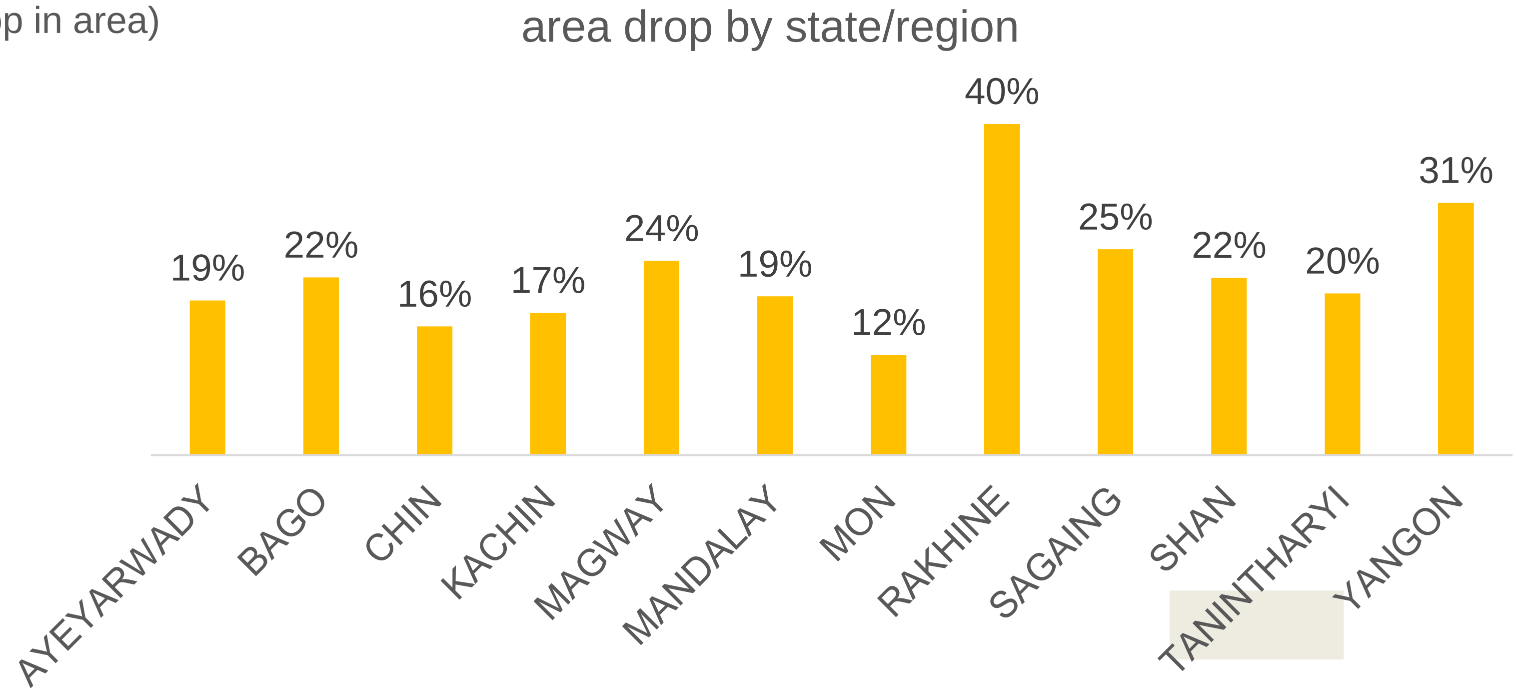
> 60 - 80

MAIN CROPS AND AREA PLANTED



- 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



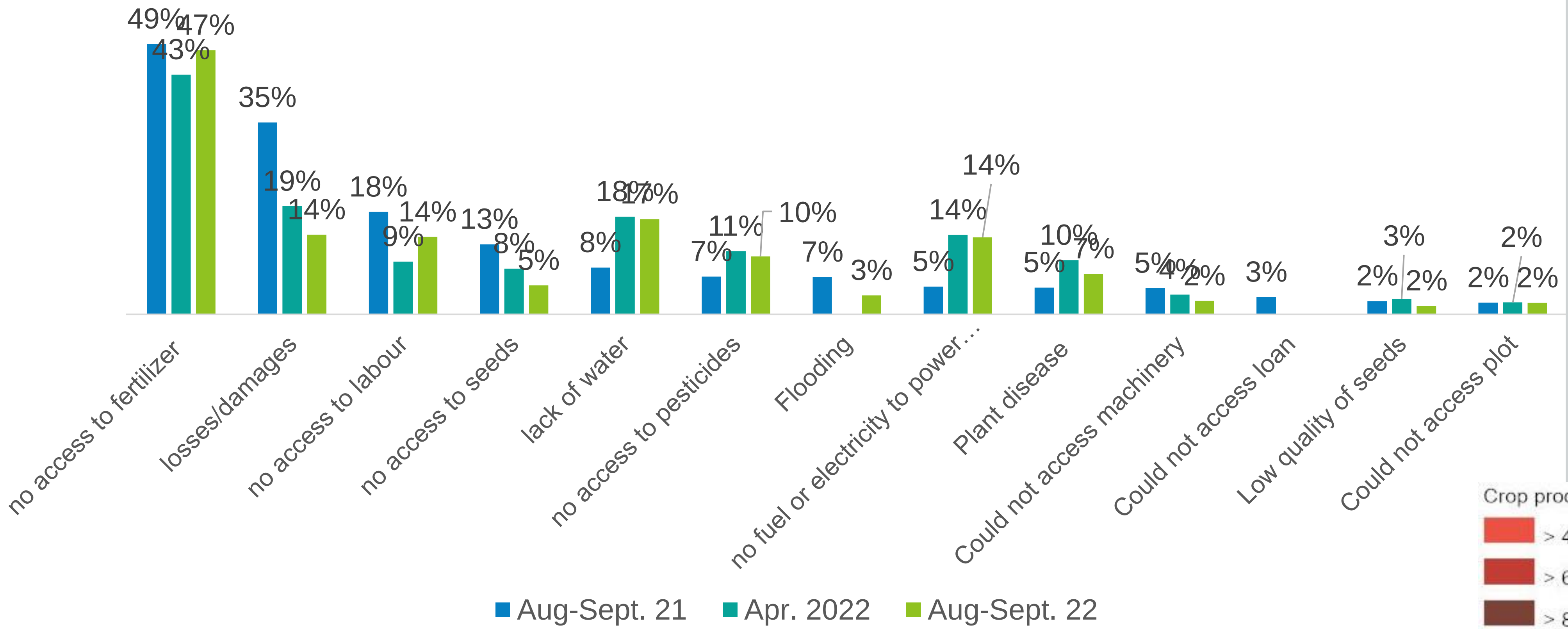


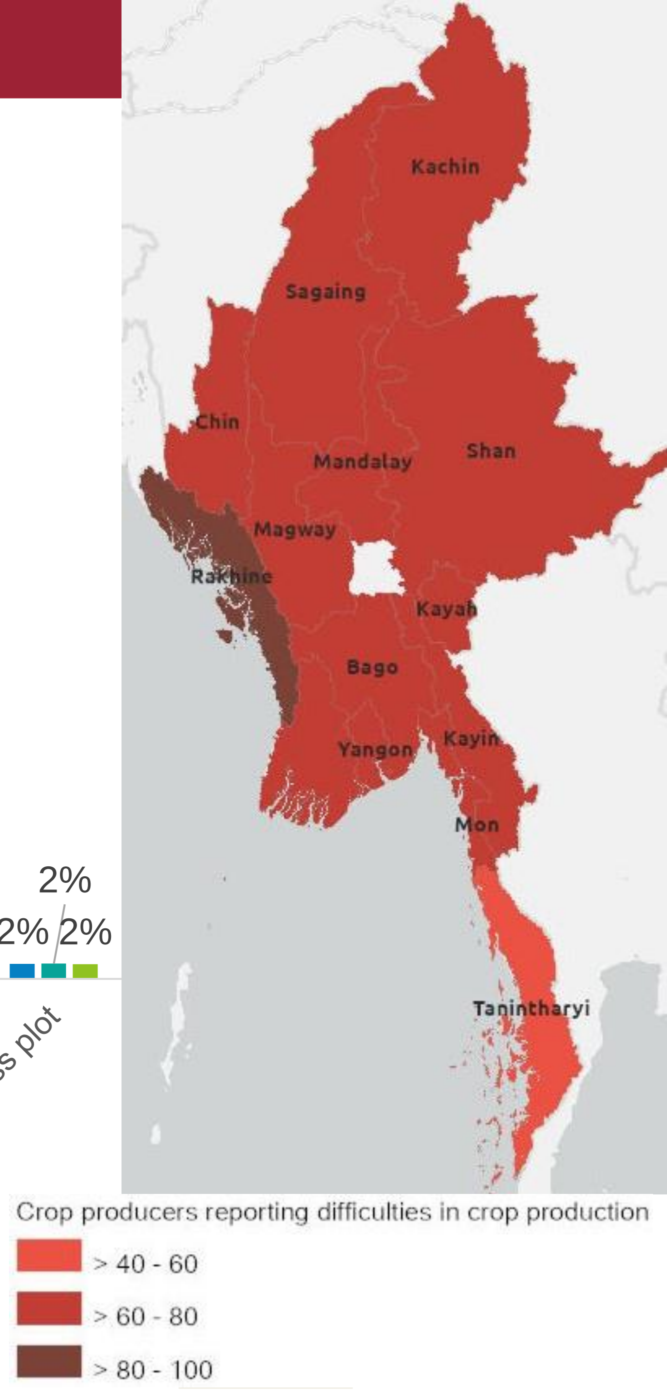
CROP PRODUCTION DIFFICULTIES AND HARVEST

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,

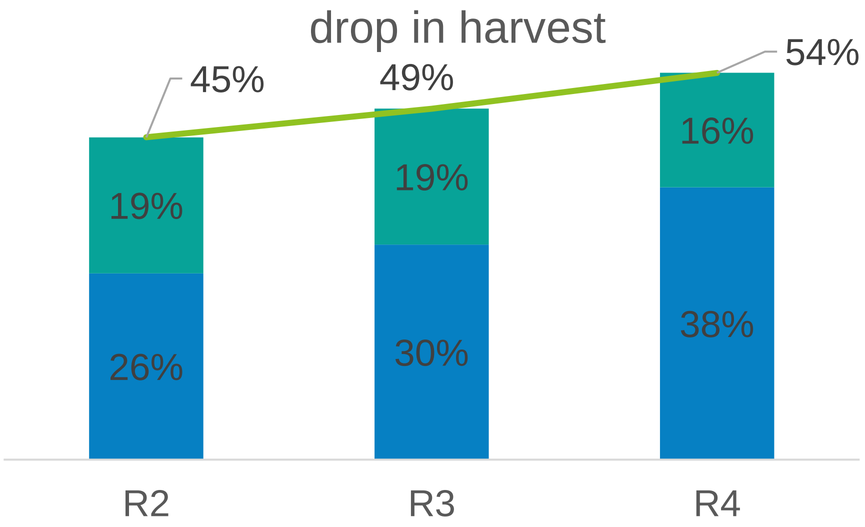
- challenges to access to fertilizer are more pronounced for cereal producers;
- accessing labour was a more frequent problem for vegetables and fruit producers;

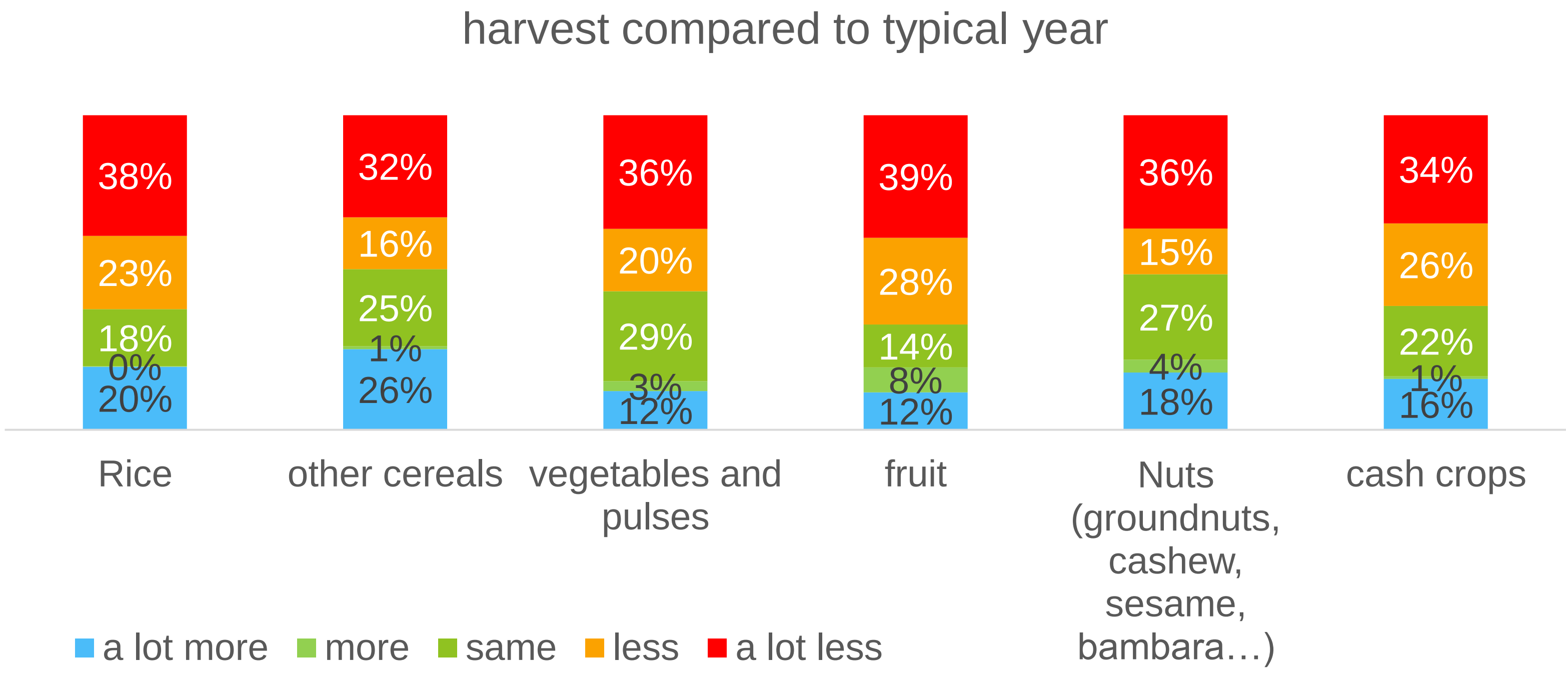


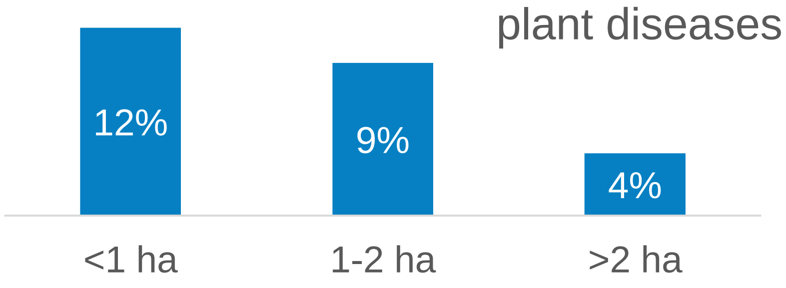


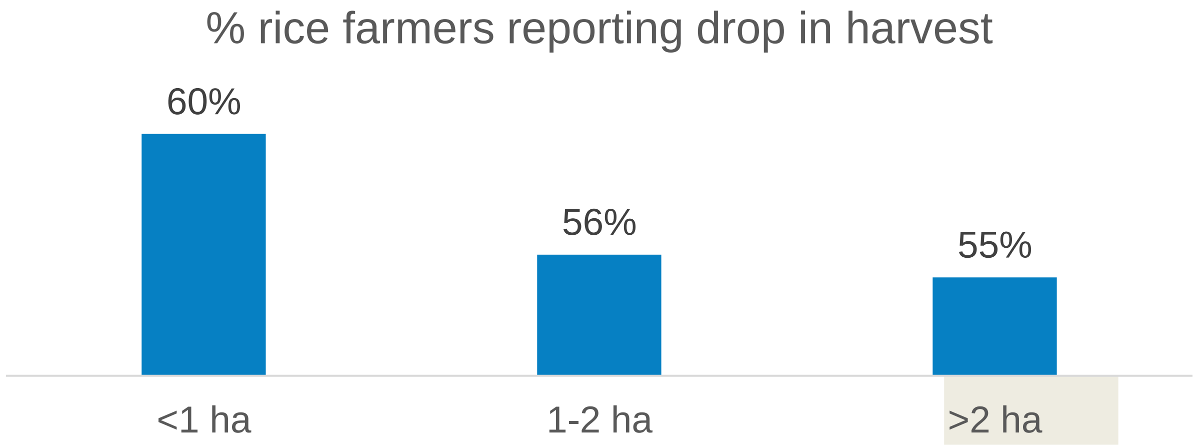
CROP PRODUCTION DIFFICULTIES AND HARVEST

- Below normal harvest (particularly for rice)
- Effect of land size



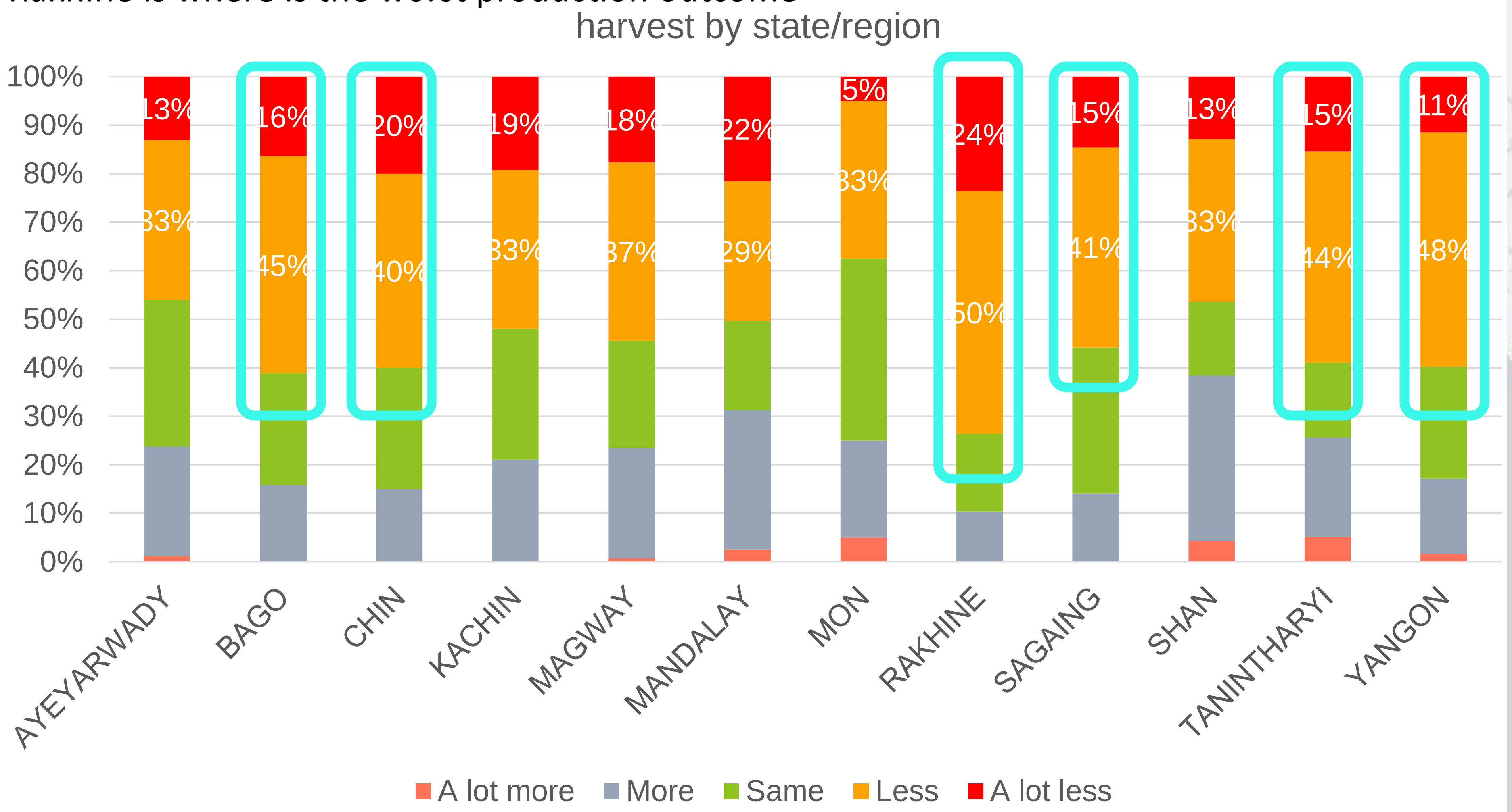


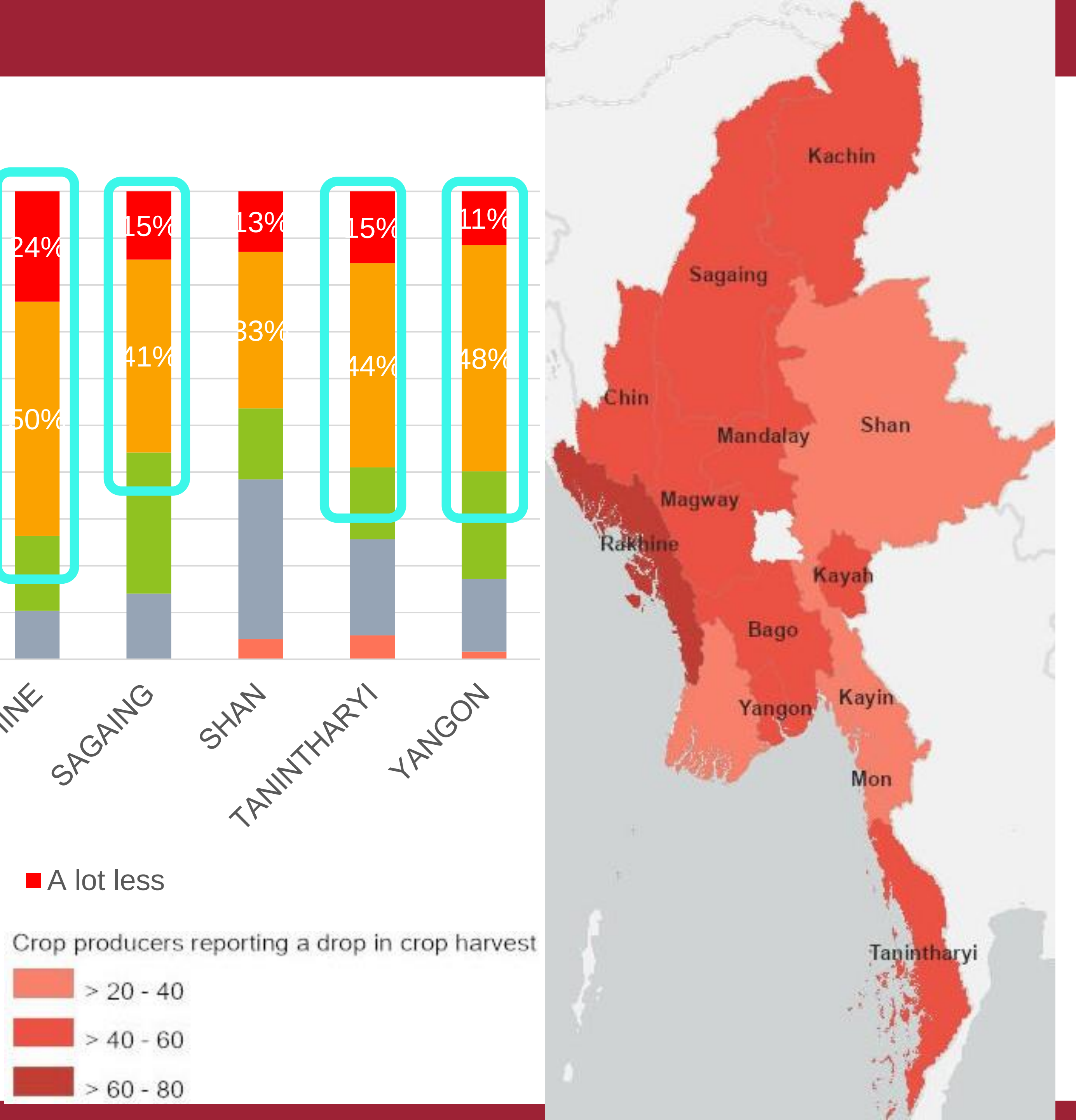




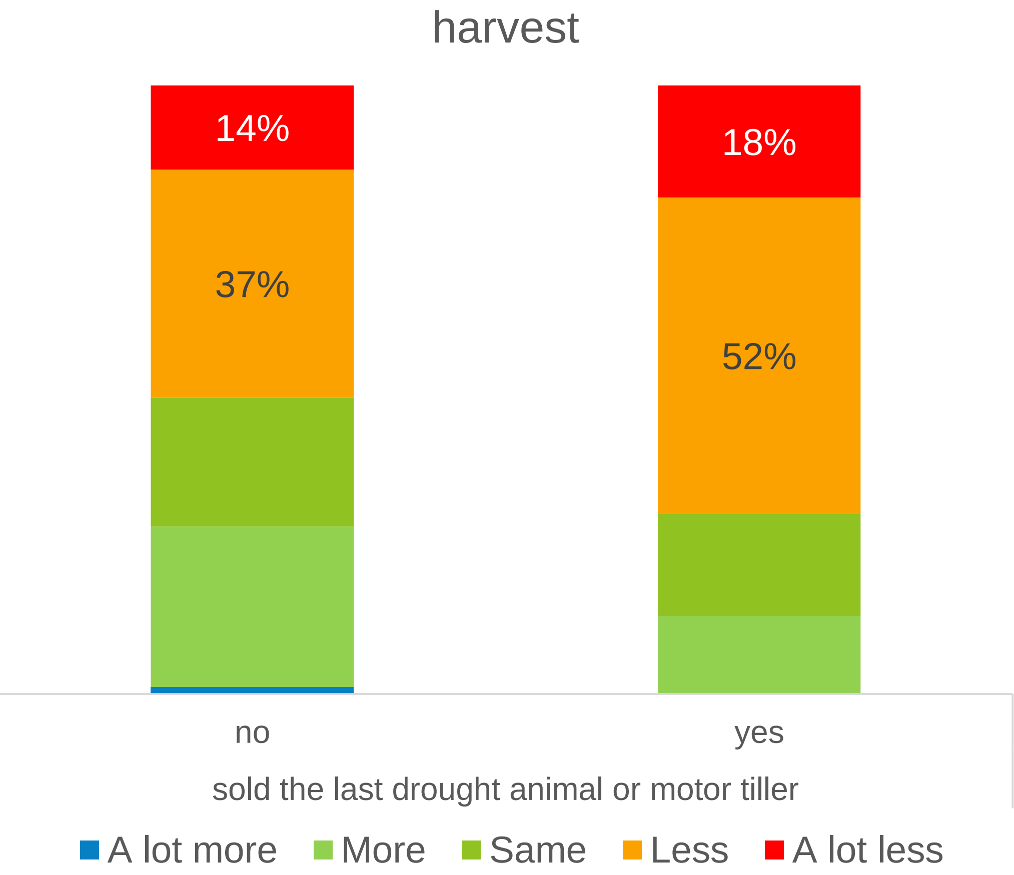
CROP PRODUCTION DIFFICULTIES AND HARVEST

Rakhine is where is the worst production outcome



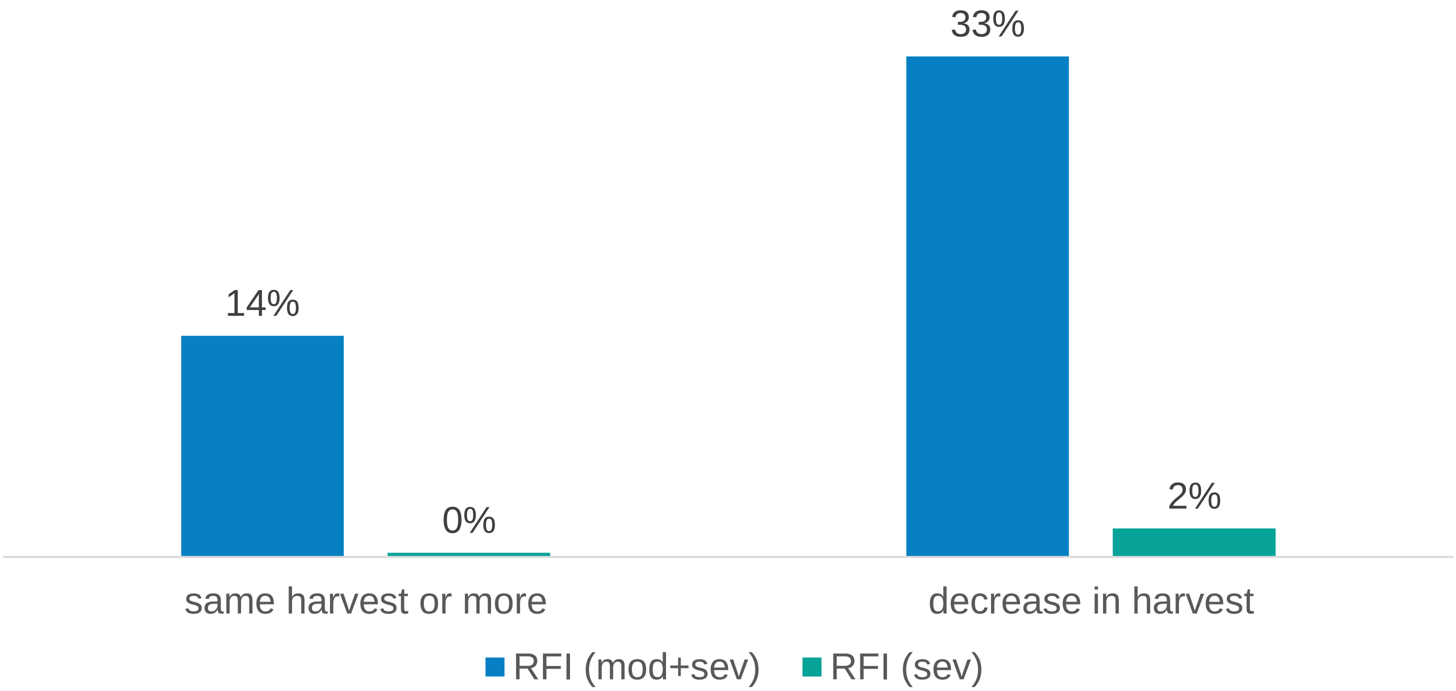


HOW ASSETS DEPLETION THREATHENS FOOD CONSUMPTION



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.



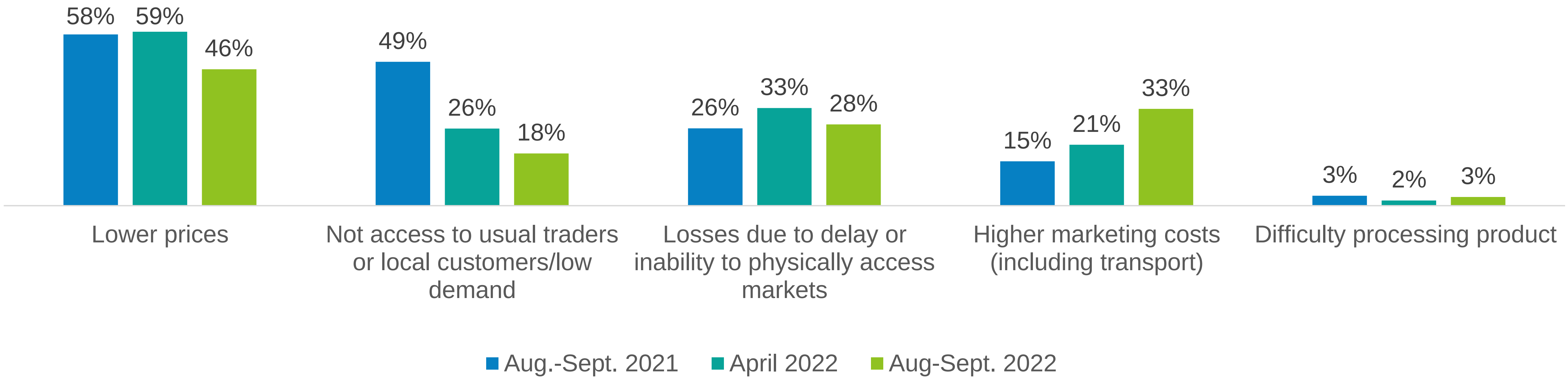
In addition:

- 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

CROP SELLING DIFFICULTIES AND PRICES

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.

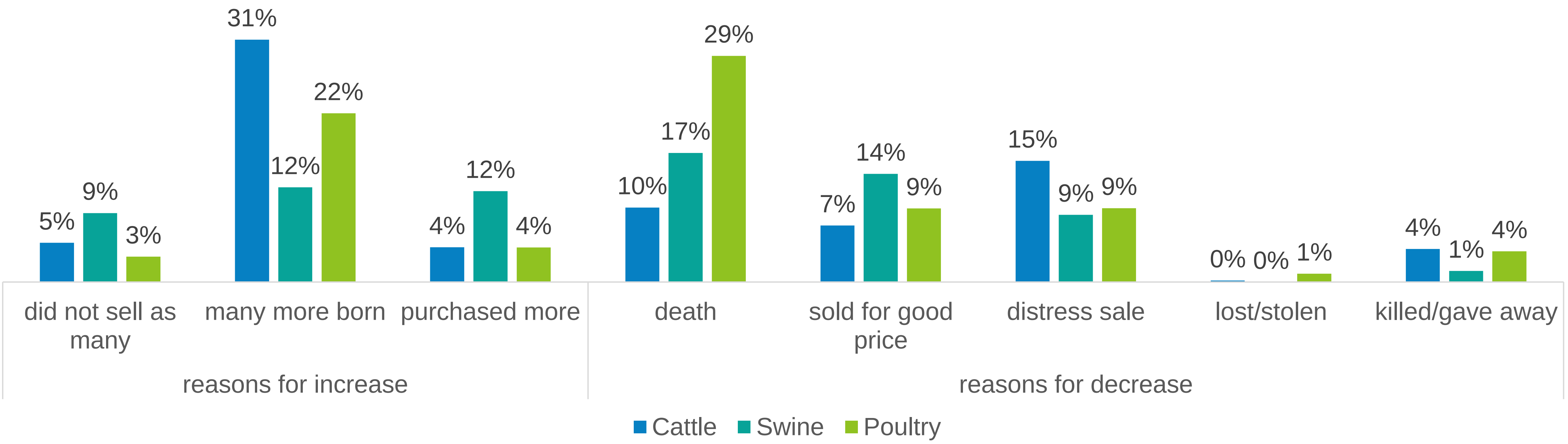


Selling vegetables affected by marketing costs (as expected, these are perishable produces), low demand was frequent for cash crops.

Low prices were particularly mentioned in Mon and Bago, the higher marketing costs in Shan and the marketing losses in Sagaing.

DECREASE IN ANIMAL HEADS

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%)

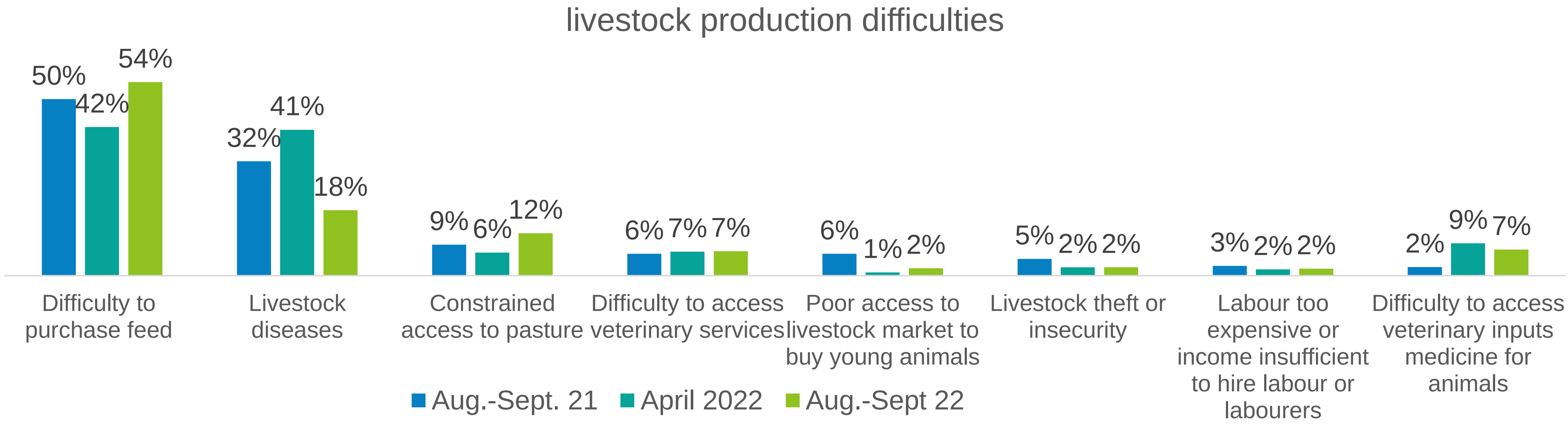


Reasons for decrease and increase seem similar to the previous round. But:

- 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)

LIVESTOCK HERDING DIFFICULTIES

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

CARI	Aug/Sep 2021					Mar/Apr 2022					Aug/Sep 2022				
State/Region	Food Secure	marginally food secure	moderately food insecure	severely food insecure	food insecure	Food Secure	marginally food secure	moderately food insecure	severely food insecure	food insecure	Food Secure	marginally food secure	moderately food insecure	severely food insecure	food insecure
AYEYARWADY	14%	56%	29%	2%	30%	27%	53%	19%	1%	20.0%	25%	52%	22%	1%	23%
CHIN	8%	36%	39%	17%	56%	18%	45%	27%	9%	36.7%	7%	32%	47%	14%	61%
KACHIN	17%	57%	26%		26%	35%	45%	20%	0%	20.7%	29%	42%	28%	1%	29%
KAYAH	11%	50%	30%	8%	38%	12%	41%	42%	5%	47.4%	12%	42%	40%	5%	45%
KAYIN	12%	57%	28%	3%	31%	15%	59%	26%	0%	26.7%	17%	53%	28%	2%	30%
MON	14%	62%	23%	1%	24%	24%	54%	21%	1%	21.4%	26%	46%	28%	1%	28%
RAKHINE	2%	58%	35%	5%	40%	18%	53%	28%	1%	28.9%	16%	36%	42%	6%	47%
SHAN N/E	16%	47%	35%	2%	37%	37%	44%	19%	1%	19.2%	29%	46%	25%	*NA*	25%
YANGON	15%	62%	22%	1%	22%	29%	56%	15%	0%	15.3%	25%	50%	24%	1%	25%
BAGO	25%	51%	24%	0%	24%	33%	55%	12%	*NA*	12.1%	25%	46%	26%	2%	29%
MAGWAY	23%	56%	21%	0%	21%	29%	48%	23%	*NA*	23.1%	19%	47%	31%	2%	34%
MANDALAY	26%	62%	12%	0%	12%	35%	50%	15%	0%	15.1%	28%	53%	18%	1%	19%
SHAN S	16%	48%	35%	2%	37%	20%	51%	28%	1%	29.1%	28%	48%	23%	1%	24%
SAGAING	25%	60%	14%	1%	15%	36%	46%	17%	1%	17.9%	22%	52%	23%	3%	26%
TANINTHARYI	14%	62%	23%	1%	24%	31%	50%	16%	2%	18.2%	25%	50%	25%	0%	25%
Overall	**18%**	**56%**	**24%**	**1%**	**25%**	**29%**	**51%**	**19%**	**1%**	**19.5%**	24%	49%	26%	2%	27%

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

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