



Ministry of Agriculture,
Irrigation and Livestock



Food and Agriculture
Organization of the
United Nations

AFGHANISTAN

COVID-19 RAPID ASSESSMENT REPORT:
AGRICULTURE PRODUCTION AND
MARKETING



AFGHANISTAN

COVID-19 RAPID ASSESSMENT OF AGRICULTURE PRODUCTION AND MARKETING

Ministry of Agriculture, Irrigation and Livestock

Food and Agriculture Organization of the United Nations

July 2020



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FOREWORD AND ACKNOWLEDGEMENTS

The COVID-19 is causing havoc disrupting lives and livelihoods of many around the world. The impact of the pandemic is beginning to emerge and much of the world continue to grapple with response measures while some countries have already began the rehabilitation process. Afghanistan is among the most vulnerable countries in the world with a broken infrastructure and weak institutions following over four decades of devastating strife. Despite significant achievements over the past 17 years, over 55 percent of the population live in extreme poverty and about 39 percent, nearly 11 million people, required emergency food assistance prior to the pandemic.

The COVID-19 pandemic has overwhelmed the fragile institutional capacities and the meagre coping capacities among the population. The continuing civil strife, efforts to initiate the peace talks, responding to weather-based disasters and a large and growing internally displaced population have already strained coping capacities and the COVID-19 is deteriorating an already desperate situation.

Despite significant resource crunch and urgent alternative needs and priorities, the Government of the Islamic Republic of Afghanistan (GoIRA) has been prompt in its response to the pandemic. The GoIRA's international partners, the United Nations and the civil society organisations have been responsive to the call for immediate action. Understandably, much of the support has so far focussed on strengthening the response capacity of the health sector. The impact on the productive sector is slowly emerging with a stark picture of desperation. Agriculture and food system in general are key economic sectors, which is already fragile and in desperate need of rehabilitation efforts. Any significant disruptions in the agriculture sector could potentially peril the livelihoods and food security of nearly 80 percent of the population.

The Ministry of Agriculture, Irrigation and Livestock (MAIL) with technical support from the Food and Agriculture Organisation of the United Nations (FAO/UN) conducted a rapid assessment with a view to understand the impact of COVID-19 on Agriculture and food system. The assessment was closely coordinated with high-level MAIL management, Provincial Departments of Agriculture (DAIL) and relevant FAO staff at the country and the Regional Office for Asia and the Pacific (FAO/RAP). Mr. Aziz Arya, Policy and Programme Officer in FAO/RAP led the assessment process with key contributions from Ms. Sonia Benmahiddine (FAO consultant), Mr. Kaustubh Devale (FAO consultant) and a number of FAO staff at the country level. Staff from DAIL with support from Mr. Rahmatullah Rahmani (FAO National M&E Officer), Mr. Khalil Rahman Yousufzai (FAO National Project Coordinator) under the overall supervision of the FAO Representative and Deputy Representative Programmes conducted the survey in 18 provinces.

Notwithstanding the time constraint and severe logistical issues under threatening conditions, the partnership between MAIL and FAO to assess preliminary impact of COVID-19 on the agriculture sector resulted in an informative report. The report clearly identifies key impacts of the pandemic on the agriculture sector and priorities to ameliorate the impact of COVID-19 on the food and agriculture sector. The priorities reflect key needs of farmers, both men and women, traders and Kuchis. Subsequent efforts are urgently needed to address the expressed priorities.



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14.07.2020

HIGHLIGHTS

The Ministry of Agriculture Irrigation and Livestock (MAIL) and the Food and Agriculture Organisation of the United Nations (FAO/UN) conducted a joint rapid COVID-19 assessment with a view to assess key impacts of the pandemic on the food and agriculture sector. The rapid assessment survey was conducted between 13 May and 10 June 2020 following the preparation of questionnaires and training of enumerators in 18 provinces. The rapid survey was conducted in 113 districts of 18 provinces, which were carefully selected to represent the main agro-ecological zones and farming systems in the country. A separate questionnaire was developed to assist the impact of COVID-19 on the Kuchi/Pastoralist households with a focus on their unique way of life and set of issues. The following are highlights of key findings and recommendations. The report reflects the survey findings of COVID-19 on the agriculture and food system as well as priorities expressed by relevant survey respondents. No value judgement was meted to alter the ranking or category of priorities.

i. UNDERLYING FACTORS

- The great majority of the population are vulnerable and were in need of emergency support even prior to the pandemic. Over 55% of the population lived below the national poverty line and nearly 40% of the population needed emergency support prior to the COVID-19 outbreak. The pandemic has further weakened the capacity to earn a living and many more are in need of emergency support for survival. The great majority of the population do not have sufficient coping capacities to withstand the disruptions caused by COVID-19.
- The government of Afghanistan and its international partners have pledged some support, which may fall short of critical urgent needs. Most of the initial support has focussed on the health sector, however, crucial support to social protection and livelihoods has not yet received the required attention. Some efforts are underway to address social protection issues in the near future.
- Structural issues in the agricultural sector, in particular, lack of crop diversification, inadequate value addition, weak infrastructure and low levels of mechanisation have made the sector less able to adapt and cope with even small shocks.
- Reliance on a very narrow set of export destinations coupled with inability to add value and conserve agricultural products are key concerns in developing the agricultural sector and building resilience.
- Key value chains suffer from a number of vulnerabilities, most of which are structural and compounded by the pandemic.

ii. KEY COVID-19 IMPACT ON AGRICULTURE

- The pandemic has had minimum effect on harvesting activities and the great majority of farmers have been able to harvest the main crops.
- Wheat constitutes more than two-thirds of the daily diet and Afghanistan usually imports almost twice as much as the estimated deficit in wheat flour. The relatively large quantities of wheat flour are partly to cover the deficit but also to account for lack of quality milling facilities in the country.
- Over 20 percent of male and 28 percent of female farmers, mostly smallholder family farms, indicate inability to plant the next crop for lack of access to inputs, mainly seeds and fertilisers.
- Both male and female poultry farmers are concerned about having access to day-old-chicks and feed, which may compromise production over the coming months.
- The nascent food-processing sector is operating far below capacity for lack of access to fresh produce.

- Transportation and cost of procuring agricultural produce have significantly increased since the onset of the pandemic.
- Street vendors/hawkers conduct the great majority of food retailing and most have lost their only source of income periling access to basic needs by a large number of households.
- COVID-19 communication efforts have been relatively successful among farmers, traders and service providers. It has been less successful among women and Kuchi pastoralists. Social media has played a significant role in communication
- COVID-19 communication efforts have been less successful among women. The great majority of women (80%) reported not having received any COVID-19 related information and 25% do not know where to obtain relevant information.
- Nearly 30 percent of Kuchis are unable to reach their traditional grazing areas and about 46 percent face restrictions to access markets.
- Fodder/feed prices and livestock transportation costs have significantly increased compared to 2019.
- Food prices have significantly increased throughout the country compared with the same time in past two years. High food prices and loss of employment for a large number of vulnerable households have caused severe hardship and compromised access to basic necessities. Concerted government efforts was successful in controlling food prices following the initial hike in March and April.

iii. KEY TRADER, FARMER AND KUCHI PRIORITIES

Survey respondents propose the following recommendations as their top three priorities. Some of these are to address key structural issues in agriculture, which have been compounded with the onset of the pandemic. The recommendations are highlighted in order of importance as suggested by the each group of survey respondents.

iii. 1. Trader priorities

- Support the development of formal market spaces in urban areas to promote reliable and safe retailing of agricultural produce.
- Improve transportation infrastructure and manage costs. Lack of access roads to farms and linkages with markets cause transportation costs to rise beyond the reach of many and sometimes access is not at all feasible.
- Facilitate access to micro-finance. Lack of access to affordable and reliable micro-finance is a key inhibiting factor to unlocking the agricultural potential in Afghanistan.
- Provision of storage, processing and packaging facilities. Lack of cold storage facilities is a key impediment to crop diversification towards more high value cash crops such as fruits and vegetables. Post-harvest loss of fruits and vegetables are the highest in Asia.
- Trade facilitation – export certificates, improved trade agreements with neighbours and reduce tariffs were mentioned as key large trader priorities.
- Lift Covid-19 related movement restrictions and open markets.

iii. 2. Farmer priorities (Crop producers)

- Provide seeds and fertilisers to enable the production of next crop. Both male and female farmers mentioned seeds and fertilisers as their top priorities to cultivate the next crop. Female farmer priorities and type of seeds has to be separately considered to ensure gender inclusion.
- Support the establishment of storage facilities, including cold storage, ventilated warehouses and silos.
- Support to agriculture mechanisation. Women in particular prioritised post-harvest mechanisation and vegetable production.

- Support to the establishment of greenhouses for a smooth supply of vegetables and fruits and help diversify diets as well as promote urban agriculture.
- Establish agriculture markets and improve market-farmer linkages. Female farmers suggested dedicated market spaces for women to enable participation in marketing as a top priority.
- Irrigation expansion/rehabilitation and flood control. Women farmers mentioned domestic water use as part of support for irrigation and water management.
- Promote public procurement/institutional purchase of domestically produced agricultural products. Inclusion of women in any public procurement was emphasised as a priority.
- Facilitate micro-finance to producers at affordable rates. Adapting micro-finance to women needs and their businesses is necessary to ensure inclusion.
- Capacity development and introduction of new and appropriate technologies in agriculture. Adapting capacity-building efforts to the needs of women is necessary for participation.

iii.3. Farmer priorities (Poultry and livestock)

- Support male and female farmers to establish small/medium-sized poultry and livestock farms – introduce high yielding species and rehabilitate pastures.
- Support post-harvest value addition – processing and improving the shelf life of dairy products.
- Provide animal feed to keep the current stock and facilitate access to affordable feed.
- Establish dedicated marketing spaces for poultry and livestock in urban areas. Create dedicated spaces for women to participate in livestock marketing.
- Establish cold storage, freezers and refrigerators for livestock products. Ensure women's participation by targeting their needs in the marketing chain.
- Provide livestock vaccination and other veterinary services to reduce mortality rates and ensure a more risk free source of livelihoods in particular for women.
- Ensure that any public procurement includes women farmers.
- Provide technical training in poultry and other livestock management.

iii.4. Kuchi priorities

Time-critical emergency interventions

- COVID-19 awareness, protective gear, testing and treatment support conducive to the Kuchi lifestyle.
- Provision of emergency animal feed to save stock – lack of access to pastures in good time may compromise their ability to save high priority stock.
- Provision of emergency food assistance.

Medium-term priorities

- Alternative livelihood development, permanent settlement and capacity development to transition into a more sedentary life.
- Provision of veterinary services, including vaccination, disease diagnostics and treatment.
- Improved access, rehabilitation and reinstating common property rights to pastures.
- Improve access to markets and livestock processing facilities.



A. BACKGROUND

The COVID-19 pandemic has disrupted lives and livelihoods throughout the world raising alarm bells in the most vulnerable and resource-poor countries with insignificant coping capacities. Afghanistan is considered among the most vulnerable and ill-prepared countries in the world, which recorded its first COVID-19 case in late February 2020 in an infected-returnee in the western province of Herat bordering Iran. An influx of returnees totalling some 287,080 persons from Iran and Pakistan between February and April 2020 seems to have helped accelerate the number of infected cases but also stretched the medical and economic resources to their limits. The officially recorded number of COVID-19 cases have reached 20,342 out of a total tested case of 47,327 (8 June 2020). The International Rescue Committee (IRC) estimates that 40% of the tests are positive, which is one of the highest in the world. However, this may not represent the full picture as testing capacities are limited and there is no systematic or representative sample testing. Several indications suggest that the infected population and number of mortality may have been much higher than reported.

The health sector in Afghanistan has significantly improved over the recent past but the system remains critically unprepared for a systematic, prompt and functional response to the pandemic of this scale. A number of facilities, including university dormitories, a palace and even schools have been converted to COVID-19 isolation centres with a total capacity of just over 1,000 beds. The Ministry of Public Health (MoPH) has just issued a statement suggesting that all available beds are about to be exhausted. The Lancet (1 June 2020) reports that Afghanistan has a centrally located diagnostic testing with a total capacity of 50 tests per day. Lack of decentralised testing facilities makes it nearly impossible to isolate and treat infected persons. The WHO suggests 22.8 skilled health workers per 10,000 people as necessary to provide all essential health services under normal circumstances. Afghanistan has 7.2 physicians in urban areas and as low as 0.6 in rural areas per 10,000 people, which is dangerously below the required standards even without the pandemic.

Public finances, by and large, depend on international support and more alarmingly the great majority of the population do not seem to have any significant resources to buffer against any income shortfalls. Over 55% of the population lived below the national poverty line prior to the pandemic. Despite extreme resource crunch, the Government of the Islamic Republic of Afghanistan (GoIRA) has been quick to respond to the pandemic. Some of the response measures, certainly not exhaustive, include:

- An allocation of USD 25 million, mostly to strengthen the health sector but also other social protection measures as part of the overall response to COVID-19 emergency.
- In March 2020, the GoIRA developed the National Emergency Response Plan for COVID-19 (NERP).
- Institutional arrangements to respond to the pandemic include establishment of:
 - External committees (COVID-19) – (i) high level committee headed by the first vice president; (ii) multi-sectoral monitoring committee at national security council; (iii) multi-sectoral committee headed by MOPH; (iv) health cluster meetings – MOPH and development partners.
 - Emergency preparedness and response (EPR) committees. The MOPH has established one EPR in each province.
 - Technical sub-committees for COVID-19 - under MOPH with five sub-committees.
 - Provincial emergency committee for COVID-19 – chaired by governor of each province with collaboration from the UN agencies.
- Improved communication across the institutional, social, cultural and religious networks to raise awareness and support containment.
- Market price monitoring and measures to prevent price fixing, hoarding and other malpractices.
- Imposing social distancing through Lockdowns and other containment measures.
- Domestic and international flights have been significantly restricted.
- The GoIRA has made major efforts to ensure food supply routes remain open with key trading partners.
- Increasing cold-storage capacities in the country to reduce losses of key agricultural products. Significant efforts are underway to enhance processing capacities among the private sector for key agricultural products.
- Strengthening social protection measures to target the most vulnerable households, including free bread distribution for a limited time to a large number of vulnerable households in urban areas.

The international community has been actively supporting the GoIRA initiatives in addition to planning and executing specific response mechanisms using available and newly pledged resources from international partners. The key sources of support up to May 2020 are notably from the World Bank (WB), the International Monetary Fund (IMF), The European Union, UN agencies, the United Arab Emirates (UAE) and the People's Republic of China.¹

Given the scale of the pandemic and underlying vulnerabilities, the current pace of response seems to have fallen far short of urgent needs. The Integrated Phase Classification (IPC) estimated that even before the COVID-19 crisis, more than 35% of the population required emergency support, which the pandemic has further exacerbated requiring larger and urgent resources to address emergency needs in the country.

This report is the result of a rapid assessment focusing on the food and agricultural sector with a view to identify key vulnerabilities and potential impact of the COVID-19 on food and agriculture. The report does not consider other impacts such as health, sanitation, education, access to food and other necessities among others. The Ministry of Agriculture, Irrigation and Livestock (MAIL) and FAO jointly conducted the rapid assessment. Section A provides background information on agriculture and the socio-economic context. Section B discusses the survey methodology and scope; section C highlights key impacts of the pandemic on the food and agriculture sector. Section D lists key priorities by different groups of respondents and section E provides brief conclusions and recommendations.

¹ ADB, Emergency Assistance for COVID-19 Pandemic Response, May 2020.

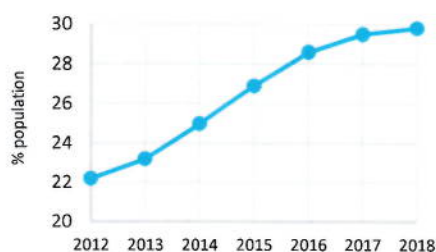
A.1 COVID-19 AND THE SOCIO-ECONOMIC CONTEXT IN AFGHANISTAN

Afghanistan is considered the third most food insecure country in the world with over 55% of the population living below the poverty line. Poverty rates in the rural areas is estimated at 59% compared with 42% in urban areas. The latest IPC analysis (May 2020) suggest that 39% of the population or 10.9 million people are facing acute food insecurity requiring emergency support over the next six months. The situation is likely to further deteriorate with the impact estimated to cost the economy between 5.4% and 17.3% of the GDP². As of early June 2020, over half a million people have returned from Iran and Pakistan since the onset of the crisis. The number of returnees seem to accelerate over the recent days in particular from Iran. Over 4.1 million people out of a total population of 32.2 million are internally displaced (IDP) and most of the returnees seems to reside in the makeshift camps joining other IDPs. The internally displaced live in overcrowded urban and rural settlements characterised by lack of access to safe drinking water, sanitation and other basic services. Large numbers of family members share sleeping spaces with very little opportunity to isolate a sick member. This situation is similar for both internally displaced and non-displaced households.

Unemployment and vulnerable employment has sharply risen, which accounted for 24 percent and 37 percent, respectively, before the pandemic. The Ministry of Economy estimates that unemployment has risen by a further 25% with 628,000 daily waged workers without any job opportunity. Food prices have sharply risen by almost 20% across five regions of the country due mainly to panic buying and temporary border closures in March. The consumer price index increased by 16.6% in April 2020. Concerted efforts by the government resulted in quickly bringing prices under control and the CPI in May 2020 is now below the levels at the same time in 2018-19. The combination of unemployment and sharp price rises between March and April 2020 significantly compromised access to food by many households. The WFP market monitoring suggests that the purchasing power of casual wage labourers and pastoralists declined by 20% and 14%, respectively.

The latest IPC report (May 2020) estimates that nearly 11 million people (35% of the population) were facing acute food insecurity (IPC Phase 3 (Crisis) and 4 (Emergency)) in April and May 2020, which require emergency food assistance. Prevalence of undernourishment in Afghanistan has been on a sharp rise over the last 6 years (see figure 1), which is the exact opposite of estimates for this indicators in the rest of Asia and much of the world. Similarly more than 41 % of children under 5 are stunted, which is among the highest in the world. In 2019, 40.9 percent of children under 5 years were stunted and 2.5 million were acutely malnourished. More than 690 000 children under-5 are severely malnourished and in need of life-saving treatment in Afghanistan. Save the Children estimates 7.3 million children faced food shortages in April and May 2020, requiring emergency assistance. The situation is projected to worsen as the pandemic takes its toll and continues to surge³.

Figure 1: Prevalence of undernourishment as percentage of total population



Source: FAOSTAT

² UNDP, 15 April 2020. Afghanistan COVID-19 Impact: Short term disruptions and policy considerations.

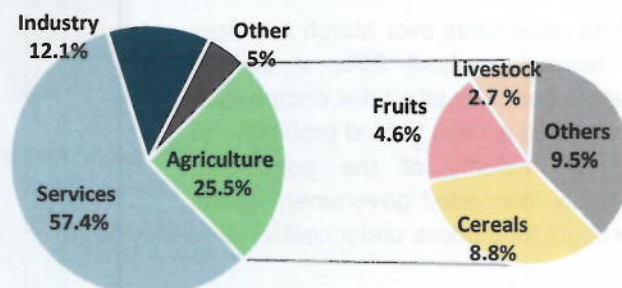
³ The population figures are based on the latest NSIA estimates.

A.2 THE FOOD AND AGRICULTURE SECTOR

Agriculture is the second largest sector after services contributing to 25.5% of the GDP and employing over 43% of the labour force. It is estimated that nearly 80% of the population depend directly or indirectly on agriculture either partially or wholly. Agriculture is expected to play a dominant role in the Afghan economy over the foreseeable future given lack of progress in manufacturing and mining sectors and their inability to absorb excess labour from the agriculture sector.

Figure 2 presents GDP by sector in 2019 indicating a least diversified economy and hence subject to vulnerability. Crops dominate the agriculture sector with the livestock sector continuously shrinking due mainly to climate change and its effects on pastures but also a number of other factors, including breakdown of time-honoured rights of access and passage across summer and winter pastures.

Figure 2: Afghanistan: GDP by sectors, 2019



Source: Afghanistan National Statistic and Information Authority (NSIA), 2019.

Cereals, mainly wheat, are the predominant crops covering 30% of the cultivated land with an annual production of about 4.9 million tonnes. Vegetables and tubers are cultivated on 5.12% of land, dominated by potatoes and onions. Orchards and fruit production has been on the rise over the recent past as a key cash crop with significant potential for transforming the agricultural sector and ameliorating poverty in rural areas. Agriculture is a key source of foreign exchange earning accounting for 85% of total export earnings in 2019. Fresh and dry fruits alone account for 45% of the total agricultural exports. Although fruit production and other high value export products are highly lucrative, further progress in the sector is hampered by the sector's vulnerability to frequent border closures and inadequate access to diversified international markets.

The agriculture sector is vulnerable to frequent weather-based natural disasters, mainly droughts, floods, frost and higher than normal temperatures. The frequency and severity of these disasters have significantly increased over the recent past and projected to worsen with changes in climate conditions. In 2019 alone, flooding affected some 294,000 people - 11,864 livestock were lost, 19.5 thousand hectares of prime agriculture land were heavily damaged and some 228,000 people lost property and livelihoods. Natural disasters also triggered 117,000 internal displacement of which 111,000 was because of floods in 2019.⁴ About 200,000 people are estimated to be affected by flood and related natural disasters (landslides, avalanches) in 2020⁵. The coinciding outbreak of the COVID-19 with seasonal flood is likely to worsen the situation, by putting a higher strain on the need for assistance and increasing the risks related to population displacement. Floods have already affected about 40,000 people between January and May 2020.⁶ In the North of the country low average precipitation affected wheat winter planting, while heavy rains in April damaged farmlands and caused significant economic losses.

The average diets in Afghanistan is heavily dependent on starchy staples, mainly wheat, accounting for slightly over 75% of the daily diet. Vegetables and fruits together account for a mere 5% of the daily diet. While overall, the food consumption is low, the diet is also poorly diverse with an over consumption of

⁴ <https://www.internal-displacement.org/countries/afghanistan>

⁵ Afghanistan ICCT Flood Contingency Plan, March-June 2020, February 2020.

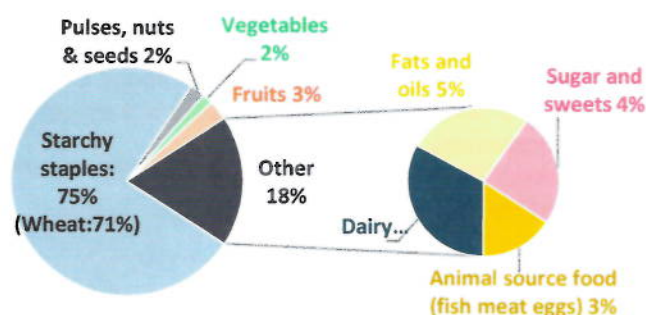
⁶ <https://reliefweb.int/sites/reliefweb.int/files/resources/Afghanistan%20Humanitarian%20Weekly%2024%20May.pdf>

starchy staples, mainly wheat, and an important lack of vegetables and dairy consumption.⁷ The rise in vegetables and fruit prices in April 2020 (+37% and +19% respectively) is worsening the ratio, while the increase of 11% in bread and floor prices is affecting access to food.⁸

The food price hikes over March and April 2020 averaging about 20% in several markets did not only affect diet composition but also made access to food prohibitive to the great majority of the population. Fortunately, concerted government efforts has brought food prices under control since May 2020.

The agricultural sector is key to food security, poverty alleviation and eradicating hunger in Afghanistan. Despite significant achievements over the past 17 years, the agricultural sector remains vulnerable and lags behind almost all Asian countries in key elements of agricultural transformation including productivity, farm diversification, mechanisation and terms of trade. The COVID-19 may further reverse the recent gains in agricultural development and deteriorate the underlying vulnerabilities.

Figure 3: Afghanistan: Dietary composition, 2017



Source: FAOSTAT

⁷ Felipe Dizon, Anna Herforth, Zetianyu Wang, The cost of a nutritious diet in Afghanistan, Bangladesh, Pakistan, and Sri Lanka, Global Food Security, Volume 21, 2019

⁸ National Statistic and Information Authority, National Consumer Price Index, April 2020.



B. THE COVID-19 RAPID ASSESSMENT: METHODOLOGY AND SCOPE

MAIL/GolRA requested FAO to support the COVID-19 rapid impact assessment in the food and agricultural sector with a view to understand the trajectory and dynamics of the impact and what measures may be adopted to protect agriculture-based livelihoods and the fragile food system. Separately, discussions among key development partners within the Food Security and Agriculture Cluster (FSAC) framework suggested a coordinated approach to COVID-19 assessments and sharing information across entities. In this regard, the following division of labour was agreed among key partners.

- The World Bank would lead efforts to assess the impact of COVID-19 on people's capacity to access food and other necessities. All issues related to food demand, effective and potential, including prices, income, purchasing power, social protection and related aspects are likely to be covered in this assessment.
- The World Food Programme (WFP) was tasked to lead the 'market functionality' assessment, which aims to identify key issues that impede the regular functioning of food markets. These include internal and external markets for both traders and consumers.
- FAO – under the leadership of MAIL – was tasked to undertake a rapid assessment of COVID-19 impacts on agricultural production and market linkages.

In addition, FAO and GeoPol in close collaboration with MAIL are in the process of conducting a more detailed COVID-19 impact assessment on household food and nutrition security as well as impact on agricultural and agriculture-based livelihoods. The Ministry of Economy has also assessed the COVID-19 impact on economic growth, unemployment and access to food in lieu of high inflation. Furthermore, a number of national and international partners have either conducted or are in the process of conducting COVID-19 assessments in a coordinated manner within the established country-level coordination frameworks. Some of these include multi-partner assessments by REACH, UN Women and OXFAM, UNICEF and University of Oxford, IPC and FEWSNET among others. The MAIL-FAO joint rapid assessment focusses on specific aspects of the food system, which are not covered in other assessments.

B.1 ASSESSMENT OBJECTIVES AND SCOPE

The overall objective of this assessment is to generate evidence and enhance granular understanding of the scale and trajectory of COVID-19 impact on the agricultural sector. The assessment is expected to inform policy and programmatic response on mitigating and addressing key impacts with a focus on enhancing the capabilities of smallholder farmers, including women farmers, Kuchis and traders. The assessment has attempted to cover all agro-ecological zones of the country.

The following are some of the key assessment limitations:

- it only focusses on farmers, pastoralists and traders;
- the sample size is not statistically representative of the population;
- the number of female farmers are relatively low in the sample, reflecting difficulties to reach women by phone;
- the assessment was remotely conducted using telephones with obvious limitations;
- the assessment does not attempt to estimate production, trade and consumption; and
- it is not a household food and nutrition security assessment.

The assessment touches on some of these issues by using available data and information from a number of sources.

B.2 ASSESSMENT METHODOLOGY AND PROCESS

MAIL assigned a team of experts led by the Deputy Minister (Technical) to work with the FAO team to initiate the process of assessment. Frequent meetings and discussions were held among the assessment teams comprising of high-level MAIL officials and the FAO technical staff in the country. The FAO Regional Office for Asia and the Pacific (RAP) provided technical oversight throughout the assessment preparation and analysis process. This section presents salient features of the assessment methodology and process.

Assessment location: The assessment team (MAIL-FAO) selected 113 districts of 18 provinces. The assessment locations represented various regions of the country (East, Centre, Central Highlands, North, Northeast, South, Southwest, West, and Northwest). Figure 4 presents a map of the assessment area with details provided in Annex 1.

Sample: The assessment included a sample of 2,919 individuals of different categories. The assessment sample included 1,196 key informants – farmers, village heads (arbab/malik), Community Development Council (CDC) members, and 76 women farmers among others. Key informants also included 86 Kuchis and members of Kuchi Development Council, 174 District and provincial authorities, district agriculture extension workers, 679 small and large traders, processors, and other actors involved in specific agriculture value chains (Table 1). The key informants were selected by the provincial and district agriculture staff of MAIL based on the criteria developed by the MAIL-FAO assessment team. In addition, 76 women farmers were specifically targeted to ensure gender balance in the assessment.

Questionnaire: FAO was tasked to develop a succinct questionnaire, fit for purpose and acutely aware of the time limitation for a phone-based interview. Key technical staff in FAO Regional Office for Asia and the Pacific (RAP), the FAO country office and MAIL, reviewed the questionnaire before it was finalised and ready for use in the field. The questionnaire was translated into the two official languages, Pashtu and Dari, and organised in KOBO to facilitate remote data collection. A total of 130 questions were organised in five modules, which were targeted to specific categories of key informants as mentioned earlier. Separate questionnaires were developed to capture the potential impact on women and value chains for key agricultural products.

Training: FAO organised a four-day training for enumerators and data controllers. The enumerators were MAIL staff at the provincial and district levels. The FAO regional coordinators in their respective regions and some FAO country staff were assigned the task of monitoring the assessment process and quality assurance. At the end of the training, a mock assessment was conducted to ensure the enumerators and quality assurance staff fully understood the questions and were able to use KOBO.

Figure 4: COVID-19 Rapid Assessment Location

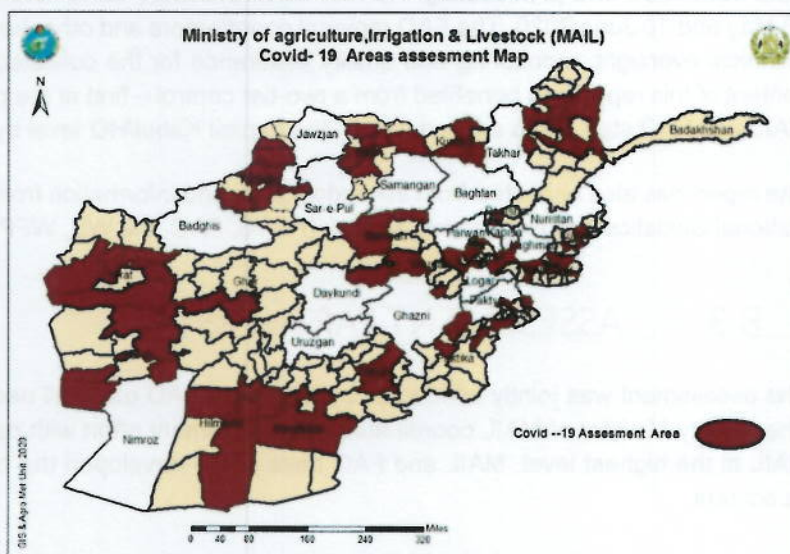


Table 1: Number and category of the assessment sample

SURVEY RESPONDENT CATEGORIES	No.
Key Farmers, Extension Workers, Village Head (Malik/Arbab), CDC members and others	1196
Women Farmers	76
Kuchis (Pastoralists) and the Kuchi Council	86
Processors	708
Provincial and District Authorities	174
Traders and Retailers	328
Value Chain	351
TOTAL	2919

Data collection and processing: Remote data collection, using mobile phones, was conducted between 13 May and 10 June 2020. The FAO regional coordinators and other key staff of the country office provided technical oversight, monitoring and quality assurance for the collected data. The final data informing the content of this report has benefited from a two-tier control – first at the provincial and regional levels by key MAIL and FAO staff and a second time at the capital Kabul/HQ level by FAO staff.

The report has also benefited from secondary data and information from a number of sources including the National Statistics and Information Agency (NSIA), FAO, the WB, WFP and IPC among others.

B.3 ASSESSMENT PARTNERS

The assessment was jointly conducted by MAIL and FAO using all necessary resources at their disposal. The Deputy Minister of MAIL coordinated the assessment effort with participation from key departments in MAIL at the highest level. MAIL and FAO have jointly developed the report and take full responsibility for its content.



C. KEY ASSESSMENT FINDINGS

This section presents key findings from the rapid assessment combined with secondary data from a number of other sources, in particular the National Statistic and Information Authority (NSIA), MAIL and others. The analysis is limited to the potential impact of COVID-19, whereas the generated data may inform additional analysis and policy agenda.

HIGHLIGHTS:

- Cereal value chains are predominantly traditional and rely on small milling, which is also the reason for its resilience even if somewhat inefficient.
- Agriculture inputs are vulnerable to adulteration and quality remains a key concern. Limited institutional capacity exists to control quality inputs and ensure a steady supply.
- Very little or no storage capacities exist to increase the shelf life of fruits and vegetables. Post-harvest losses fresh fruits and vegetables reach as high as 25% and sometimes 100% when the limited export outlets are closed at critical times.
- Processing is limited, adding to export vulnerability and distress selling at the time of harvest.
- Exports of agriculture products are dependent on limited destinations, making the sector highly vulnerable.
- The great majority of farmers are able to harvest the current crops. The key issue is not harvesting per se but marketing and storage of harvested crops.

HIGHLIGHTS:

- Over 20% of male and 28% of female farmers reported that they will not be able to plant the next crop, mainly due to lack of access to farm inputs and potentially not being able to sell their harvested crops.
- Access to day-old chicks (44.4%) and feed (36%) were the key concerns of the male and female poultry farmers. Over 10% of the poultry farmers mentioned lack of access to markets as key concerns.
- Over 35% of livestock owners reported lack of access to feed and nearly 28% reported lack of access to veterinary services as key factors affecting the livestock sector.
- The great majority of farmers can access milling facilities; just over 6% of households reported having restricted access to wheat mills. Other processing facilities seem reported being operational.
- Limited restrictions in food and livestock trading were initially experienced, which have mostly been lifted.
- COVID-19 Communication and awareness raising has been highly successful among male traders and farmers but less successful among women and Kuchis.
- The Kuchis are able to access their traditional grazing areas with some limitations. However, access to markets have been more challenging.
- The great majority of Kuchis have limited physical and financial access to fodder, which is critical before the stock reach spring and summer pastures.
- Food prices significantly increased with the onset of COVID-19 in March and April but have been brought under control since May 2020.
- Resource-poor farmers lost income from casual labour and could no longer afford the high food prices, which compelled them to eat into their seeds and productive capital. This may compromise the capability of small holders to plant the next crop.

C.1 KEY VALUE CHAINS

The wheat value chain is predominantly traditional lacking recognisable and enforceable standards, which is a key factor in promoting impersonal trade. Farmers typically save wheat for the household consumption as a priority and sell the remainder to neighbours and traders. Most of the trading in locally produced wheat is in the form of wheat grain. Small and traditional mills continue to dominate the milling sector. COVID-19 does not seem to have affected the wheat and rice value chain in any significant degree, as the traditional system is relatively resilient even if inefficient. Table 2 presents the value chain structure at the farm-gate.

Table 2: Marketing chain of selected cash crops

FARMER LEVEL	APPLE	APRICOT	FIG	GRAPE	POMEGRANATE	TOMATO
Source of seed						
Own Seed//Seedling/Sapling	14%	30%	70%	44%	72%	21%
Farmer to farmer exchange	31%	31%	30%	32%	3%	3%
Seed company	28%	28%	-	18%	14%	53%
Other*	27%	11%	-	6%	12%	23%
Source of chemical fertilizers						
District/Local Market	52%	37%	-	30%	21%	21%
Provincial Market	42%	54%	75%	70%	79%	63%
After Harvest, share of output						
Consumed by farmer	14%	11%	3%	8%	5%	10%
Sold to neighbors/village or district retailer	46%	47%	28%	30%	15%	32%
Sold to Traders	40%	42%	70%	63%	80%	58%

*MAIL/NGOs (NHLP, AKF, DACCAR, ACTED)

Establishing new orchards increasingly depend on imported and improved varieties, which has also increased the farmer-to-farmer exchanges for some varieties. Nevertheless, traditional varieties continue to dominate the seed sector for many crops and together with lack of soil nutrient replenishment have contributed to significantly lower levels of yields in the region.

Farmers have also complained about the low quality agricultural inputs, in particular seeds and fertilisers. There does not seem to be adequate institutional capacities to establish, monitor and control agriculture input quality throughout the marketing chain. At the time of crises, such as the COVID-19 concerns for input quality multiply and seem to increase risks to the farmers. Furthermore, almost all fertilisers and some of the seeds/seedlings are imported, which are vulnerable to trade restrictions. Lack of access to adequate fertilisers and improved seed varieties are likely to affect crop production for the next season.

The great majority of key cash crops, in particular fruit, are sold to national traders and subsequently to exporters. A relatively large share of these crops are sold fresh without any processing/value addition, which are highly perishable with limited or no capacity for storage. The assessment estimates that under normal circumstances on average more than a quarter of apples, 19% of grapes and almost 17% of tomatoes and pomegranates are lost after the harvest. These are striking figures and the COVID-19 impact is likely to significantly increase post-harvest losses given restrictions of movement across provinces and shutting down borders. Government efforts to promote high-value crops continue to yield limited results for lack of access to markets. Despite significant efforts, Afghanistan continues to depend on a limited number of markets for agriculture in the region.

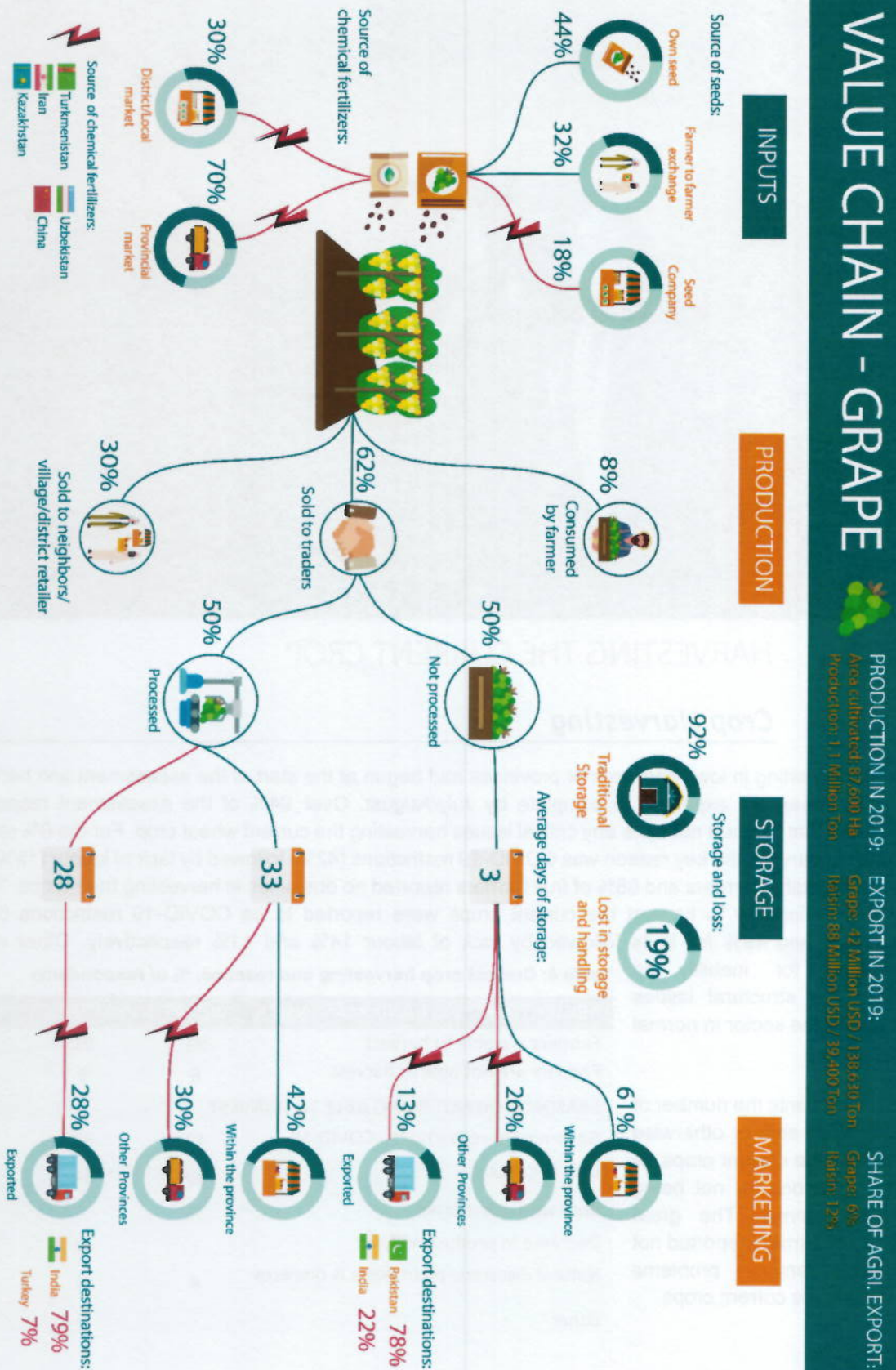
Table 3: Processing and marketing for key cash crops

TRADER LEVEL	Apple	Apricot	Fig	Grape	Pome grenate	Tomato
Traders after acquiring from farmers or local markets						
No processing	64%	50%	31%	50%	90%	65%
Processing	36%	50%	70%	50%	10%	35%
WITHOUT PROCESSING						
Sale in the province	87%	76%	100%	52%	33%	69%
Sale in other provinces	13%	24%	-	22%	21%	31%
Destination of Export						
Pakistan	98%	97%	-	78%	97%	100%
India	2%	2%	77%	22%	3%	-
UAE	-	-	23%	-	-	-
PROCESSED						
Sale in the province	66%	1%	25%	26%	31%	38%
Sale in other provinces	19%	84%	-	18%	6%	14%
Export	15%	15%	75%	56%	63%	48%
Destination of Export						
Pakistan	-	5%	-	1%	88%	100%
India	-	62%	98%	79%	13%	-
UAE	-	2%	1%	2%	-	-
Other	-	21%	-	10%	-	-

Figure 5 depicts value chain for grape highlighting key potential vulnerabilities in the face of COVID-19. The vulnerable sections of the value chain are highlighted with a view to prompt early action and potential medium to long term development efforts for an efficient and resilient value chain. Recently some improved varieties have been introduced, mostly imported. Own seed stock and farmer-to-farmer exchange are predominant sources of seedlings for establishing and rehabilitating vineyards. Afghanistan entirely depends on imported mineral fertilisers. Over 51% of the grapes are sold fresh and the rest are processed into raisins. Over 56% of raisins and 26% of the fresh grapes are exported. Export destinations for grapes are Pakistan (78%) and India (22%) while 79% of raisins are exported to India and 7% to Turkey. Key vulnerabilities for grape and other agricultural commodities stem from linkages to other provinces and export destinations, which have been subject to restrictions since the onset of COVID-19. The long-term vulnerabilities stem from the fact that most value chains are dependent on a limited number of export markets, value addition is limited and necessary services along the chain are weak or non-existent.

Annex 2 presents value chains for pomegranate, tomatoes and apples, which are among the key cash crops for which Afghanistan has comparative advantage and a reputation for high quality. The value chain analysis is expected to also inform government policy and strategy in further developing and building resilience along the chain. However, this report limits itself to the potential impact of COVID-19 on the value chain of key agricultural products.

Figure 5: The grape value chain



Potential COVID-19 vulnerabilities



C.2 HARVESTING THE CURRENT CROP

C.2.1 *Crop Harvesting*

Wheat harvesting in low-lying warmer provinces had begun at the start of the assessment and harvesting in cooler areas are expected to complete by July/August. Over 94% of the assessment respondents suggested that they will not have any critical issues harvesting the current wheat crop. For the 6% reporting difficulty to harvest, the key reason was COVID-19 restrictions (42%) followed by lack of labour (19%). Over 91% of vegetable farmers and 88% of fruit farmers reported no obstacles in harvesting their crops. The key reasons for inability to harvest the current crops were reported to be COVID-19 restrictions 58% for vegetables and 49% for fruits followed by lack of labour 14% and 11% respectively. Other reasons mentioned for inability to harvest are structural issues relevant to the sector in normal years.

Table 4 presents the number of respondents able or otherwise to harvest the current crops as well as reasons for not being able to harvest. The great majority of farmers reported not having any problems harvesting the current crops.

Table 4: Current crop harvesting and reasons, % of respondents

ABILITY TO HARVEST AND REASONS	WHEAT	VEGETABLES	FRUITS
Farmers are able to harvest	94	91	88
Farmers are not able to harvest	6	9	12
REASONS FOR NOT BEING ABLE TO HARVEST			
Government restrictions - COVID-19	42	58	49
Lack of Labour	19	14	11
Busy with other tasks	35	-	-
Decrease in production level	-	21	7
Natural disasters, plant pests & diseases	4	4	25
Other	-	3	8

Over half the reasons for not being able to harvest current crops are structural and unrelated to the COVID-19 crisis. These are pests and diseases, being busy with other chores, decrease in yields and others. The main message however, is that COVID-19 seems to have had negligible impact on the ability to harvest crops.

C.2.2 *Wheat Balance Sheet*

Table 5 presents the wheat balance sheet based on the MAIL and NSIA estimates. The 2020 wheat balance sheet estimates are based on data from NSIA with a key change in production estimates. The COVID-19 assessment and the FAO/GIEWS found that production IN 2020 would be over 7% lower than 2019.

The NSIA/MAIL report estimates total requirement for 2020 at just over 6.4 million tonnes, which includes 5.3 million tonnes of food use and 0.73 million tonnes of losses. Domestic production, based on NSIA forecasts for 2020 with an estimated 7.34% decrease based on the COVID-19 assessment findings is estimated at 4.53 million tonnes. Assuming food aid level will continue at the levels of 2019, the country would need to import a total of 1.79 million tonnes of wheat. Wheat flour is imported in large quantities every year averaging over 2.4 million tonnes per year due mainly to inadequate and low-quality milling capacity in the country in addition to the estimated deficit.

Table 5: Wheat Balance Sheet, in 000s MT

Components	2019	2020
Total requirement	6 327	6 425
Food use/1	5 217	5 322
Animal feed	-	-
Seed requirement	376	373
Losses	733	730
Domestic production/2	4 890	4 532
Import requirement	1 437	1 893
Food aid (WFP)/3	100	100
Deficit	1 337	1 793

Source: NSIA/MAIL, *Wheat Prospective Report*, April 2020

1. 162kg wheat/capita/year

2. 2020 Est. is based on 2019 and COVID-19 assessment

3. Assuming 2020 food aid is similar to 2019

This assessment did not attempt to estimate the wheat balance sheet and hence relied on available information, which may need to be treated with some caution. The average commercial import over the past five years is estimated at about 2.4 million tonnes, which would yield a significant annual surplus even if one accounts for a potential stock build up. The NSIA balance sheet does not seem to distinguish between wheat grain and flour. The conversion factor might be quite high in view of the highly inefficient traditional mills in the country. In view of the fact that Wheat is a very important crop in terms of area cultivated (26% of total agricultural land) and the daily diet (71%), it is necessary to carefully estimate wheat balance sheet and regularly monitor its development.



Photo credit : FAO

C.3 POTENTIAL IMPACT ON THE NEXT CROP AND LIVESTOCK

One of the key concerns from the COVID-19 restrictions is the impact on agriculture activities and marketing. The assessment sought to understand key concerns by the farmers and what are the likelihood of farmers not being able to cultivate their next crop compared to the preceding year.

The assessment results on gender-disaggregated farmers' perceptions and concerns are presented in table 6. The immediate next crop calendar, summer vegetables, has already begun in most of the country except some parts of the central and North-eastern highlands. Over 28% of female and 20% of male farmers reported that they are not able to cultivate the next crop. The key reason for this was lack of access to critical inputs - seeds and fertilisers- as well as access to markets.

Table 6: Perceived COVID-19 Impact on crop cultivation

Potential Impact on the Next crop compared to last year	FARMERS		Average /1
	Female	Male	
Farmers are able to plant summer vegetables	72	80	79
Farmers not able to plant summer vegetables	28	20	20
Main concerns regarding the next crop			
Lack of access to inputs (seeds and fertilisers)	43	47	47
Reduced prospects to sell vegetables	5	31	29
Lack of farm power	5	8	8
Covid-19 Restrictions	24	2	4
Lack of Irrigation water	12	7	7
Other (bad weather, pests, disease)	10	5	6

1. Weighted average.

Over 43% of female and 47% of male farmers expressed concerns over lack of access to agricultural inputs for the next crop. Some 31% of male and 5% of female farmers expressed concern over lack of access to markets and the inability to sell their produce at district and provincial markets. Nearly 5% of female and 8% of male farmers reported concern for potential lack of farm power for land preparation and cultivation.

Land preparation and parts of vegetable cultivation operations are usually performed by agricultural machinery, which are hired by small holders, hence the concern for lack of access. Only 2% of male and 24% of female farmers mentioned COVID-19 restrictions as the direct cause of inability to cultivate the next crop. The answers from female farmers may include access to markets and mobility. Lack of irrigation as a key concern was mentioned by 12% of female and 7% of male farmers, which may relate to the inability of farmers to congregate and jointly repair the irrigation channels and water intake, which is usually an annual event. The domestic use of water, mainly the responsibility of women, may explain the relatively high concern by women.

Table 7 presents key concerns expressed by male and female farmers related to poultry farming and animal husbandry. Over 46.5% of male and 12.5% female poultry farmers suggested lack of day-old chicks as a key concern. Over 36% of male and 28% of female farmers showed concern over lack of access to poultry feed as key impediments to poultry farming. Over 35% of male and 32% of female livestock owners reported lack of access to feed as a

key concern. Over 28% of male and 14% of female farmers pointed lack of access to vaccination and veterinary services as key factors affecting the livestock sector. The livestock farming does not include pastoralists but rather mixed livestock-crop farmers and households with 1-4 livestock. The Kuchi pastoralists are the focus of a separate section in this report with unique set of concerns and impediments.

Table 7: Impact on livestock and poultry farming, % of respondents

MAIN CONCERNS	POULTRY FARMERS			LIVESTOCK FARMERS		
	Female	Male	Average /1	Female	Male	Average /1
Lack of day-old-chicks	12.5	46.5	44.4	-	3.4	3.3
Lack of access to feed and pasture	28.1	36.1	35.6	32.1	35.5	35.3
Lack of market opportunities	12.5	10.1	10.3	12.5	26.9	26.2
Lack of inputs and resources (animal feed, skilled Labors, training, awareness)	43.8	6.2	9.0	39.3	5.0	6.7
Lack of vaccinations / veterinary care	-	0.4	0.4	14.3	28.6	27.9
COVID-19 restrictions	3.1	0.1	0.3	1.8	-	0.1
Other	-	-	-	-	0.6	0.6

1. Weighted average.

C.4 IMPACT ON PROCESSING

The great majority of farmers reported that they are able to mill the two main staples wheat and rice. Over 94 % of wheat farmers and more than 97% of rice farmers reported that they are able to access mills. The great majority of rice consumed in Afghanistan are imported but a small amount is produced, which does not seem to suffer from access to mills. The nearly 7% of respondents who reported inability to access mills indicated travel restrictions are the key reasons (See table 8). By the time this report was compiled, most of the COVID-19 related restrictions on processing and marketing have been lifted.

The mill owners suggested that 50% of wheat mills and 46% of rice mills regularly function, while 42% and 38%, respectively, reported partial operations. Similarly 43% of fruit and 30% of vegetable processors reported operating regularly. Over 66% of vegetable processors and 82% of dairy processors reported operating partially (see Table 9).

Table 8: Access to cereal milling, % of respondents

FARMERS'S ABILITY TO MILL	WHEAT	RICE
Farmers are able	93	97
Farmers are not able	7	3
Reasons		
Mills are closed/roads to mill are blocked	78	21
No access to milling equipment	14	33
Lack of access to the market	-	13
Lack of harvesting machines/storage facilities	-	21
Lack of water	5	4
Other	3	8

Table 9: Processing Facilities, % of processor respondents

	Wheat	Rice	Fruits	Veg.	Dairy
Mill/processing facility operations					
Fully operational as last year	50	46	43	30	3
Closed	8	15	9	4	14
Partly open (only some days/hours)	42	38	48	66	83
Reasons for closure/partly open					
Government regulation	33	-	25	50	22
Roads are blocked	-	-	75	50	22
Lack of production	33	50	-	-	11
Lack of market opportunities	-	50	-	-	-
Other	-	-	-	-	44

The key reason for closure of wheat mills was reported government restrictions (33%) as part of COVID-19 containment efforts. Fruit processors reported road closures as the key reason for operating below capacity (75%). Rice milling is relatively insignificant and the assessment period coincided with the off-season for milling. Dairy processing is dominated by traditional methods and limited to a few products such as yoghurt, dry yoghurt (Quroot), milk, one type of cheese and butter.

Indeed vegetable and fruit processing are nascent and operate at a very small scale. One of the key challenges in the underdevelopment of this sector is access to technology as well as reliable and affordable energy.



C.5 MARKETS AND TRANSPORTATION

Most retailing in urban areas (the capital city, provincial and district centres) are conducted by a very large number of small hawkers. Most of these hawkers have very little or no savings and see street vending as the only viable means of earning a living. The hawkers and small traders are the most vulnerable and resource poor group with very little capability to absorb any minor shocks. The COVID-19 restrictions have severely affected this group when markets and congregations were restricted in many urban centres around the country. The restrictions on movements and markets have also affected other traders, which has indirectly affected farmers and other actors along the value chain (Figure 5 and Annex 2).

Table 10 presents trader perceptions of price variations for transportation, fresh food products and wheat flour. Market prices have been separately analysed in section C.8. The trader perceptions of prices are in line with actual market prices discussed in section C.8. The great majority of traders reported increased prices for wheat (97%), fresh food (83%) and transportation (81%) compared with 2019.

Over 96% of sheep/goat and 93% of cattle traders reported increased prices in all markets.

Table 10: Price variation perception of traders, % of traders

Items	Prices compared with 2019		
	Similar	Increased	Decreased
Transportation	17	81	2
Fresh produce	13	83	4
Wheat flour	2	97	0
Sheep/Goat	3	96	1
Cattle	3	93	4

Table 11 presents trade restrictions as reported by three groups of traders – (i) small traders and hawkers operating at a small scale, (ii) large traders, usually trading across provinces and linked to export markets and (iii) other – referring to traders associated with the chamber of commerce, service providers to other traders and integrated production-trading operators.

The provincial and national level fresh produce traders have faced more restrictions compared with district level traders, 50%, 62% and 37%, respectively. The great majority of respondents reported partial closure of markets, which is in line with reports of intermittent market closures in a number of large cities. Only 18% of national level traders, 14% of provincial and 13% of district level traders reported all week closure of markets.

The figures for dry food products such as grains, wheat flour, legumes and cooking oil are on a similar trajectory. Nearly 50% of provincial and national traders and 63% of district traders reported no restrictions to procure and transport food products. The restrictions in both markets are partial with the great majority reporting restrictions only some days, which is in line with government policy to allow food markets to operate with least disturbance. Over 51% of the traders at national level and 29% at provincial level reported inability to sell their merchandise. Over 40% of national level traders and 38% of provincial traders suggest that market and road closures are the main reasons for reduced sales. Over 42% of the provincial traders and 28% of national level traders suggest that lack of purchasing power and number of visitors to the markets are the reasons for reduced food sales. Transportation unavailability and high costs have also contributed to reduced sales.

Table 11: Marketing and transportation restrictions, % of traders

Marketing restrictions	Markets		
	District	Provincial	National
ABILITY TO PROCURE PRODUCTS			
Restrictions on procuring and transporting fresh agriculture produce (vegetables, fruits, tubers, others) from farms to:			
Traders do not face restrictions	63	50	38
Traders face restrictions	37	50	62
Frequency of restrictions			
All week	13	14	18
Some days	88	86	82
Restrictions on procuring and transporting dry food (cereals, legumes, cooking oil others) from farms/wholesale market to:			
Traders do not face restrictions	63	49	-
Traders face restrictions	37	51	-
Frequency of restrictions			
All week	9	13	-
Some days	91	87	-
ABILITY TO SELL MERCHANDISE			
Traders are able to sell	-	71	49
Traders are not able to sell	-	29	51
Reasons			
Market/roads closure	-	38	40
Lack of market opportunities	-	42	28
Transportation issues (not available, high cost)	-	12	29
Other	-	8	3

Table 12 presents key challenges faced by livestock traders. The great majority of livestock traders (91%)

Table 12: Key challenges for livestock traders, % of respondents

KEY ISSUES	%
Ability of traders to acquire and sell livestock (buffalo, cattle, goat and sheep)	
Traders are able to acquire and sell livestock	91
Traders are not able to acquire and sell livestock	9
Challenges faced by traders to procure and sell livestock	
Market/roads closure	83
Transportation issues (not available, high cost)	31
Insufficient stock for trading	17
High prices	11

report no restriction to livestock trading – procuring and selling in the market. Over 34% of the livestock traders mention market and road closures as a key challenge followed by access to transportation (31%).

C.6 COVID-19 COMMUNICATION AND OUTREACH

The government of Afghanistan placed significant importance on communication and awareness raising with regard to COVID-19. Several ministries and local institutions have continuously been provided with specific messages to convey to the public. The social media has played a significant role in conveying key messages, both accurate and conspiratorial. The MOPH was highly instrumental in providing more accurate information and debunking several unfounded claims, treatments and measures to contain the pandemic. In a way the social media proved a double-edged sword, but the government seemed well-prepared to blunt the negative effects of misinformation.

Table 13: Communication efficacy among key value chain actors, % of respondents

Communication	Farmers			Traders/2			Kuchis
	Female	Male	Average/1	Small	Large	Livestock	
Have received advice	20	78	75	78	93	75	58
Have not received advice	80	22	25	22	7	25	42
Source of Advice							
MoPH	13	66	65	66	82	79	60
MAIL	7	4	4	6	5	6	8
Media	53	21	21	12	13	12	18
NGO, District Adm/other	27	10	10	16	-	4	14
Aware where to obtain COVID-19 safety advice?							
Yes	75	85	85	84	90	91	59
No	25	15	15	16	10	9	41

1. *Weighted average.*

2. *Small traders: operating local markets, street vendors at small scale. Large traders: operating provincial, national and export markets trading bulk - agric. products.*

Table 13 presents the impact of COVID-19 communication among key actors across the agriculture value chains. Over 75% of farmers, 78% of district/provincial traders, 93% of national traders and 75% of livestock traders have reported receiving COVID-19 messages. The main source has been the MOPH, followed by social media and district-level institutions. Surprisingly communication through social media seems to have reached farmers and Kuchis more than their urban counterparts. Unfortunately, 80% of women reported not having received any advice and communication. Over 25% of women reported not knowing where to obtain COVID-19 related information, second only to Kuchi households. This is alarming because women play a critical role in household hygiene and the necessary preventive measures.

More than 91% of livestock traders, 90% of national traders and 85% of farmers reported to know where to obtain COVID-19 safety advice. After women the Kuchis are the only group that have received less information (58%) and are aware where to obtain relevant information (59%), which is understandable given their way of life and lack of a fixed residence.



Photo credit : FAO/ Sayed Maqsood Hashimi

C.7 COVID-19 IMPACT ON PASTORALIST – KUCHIS

The Kuchis are traditionally migratory households depending almost entirely on livestock for their sustenance. The migration routes are usually traditional rights of access between summer and winter pastures across the country. Some of these rights have been disturbed over the prolonged civil strife. Precise figures on the number of Kuchi population and the exact definition are not accurately known. The National Multi-sectoral Assessment on Kuchi (NMAK), conducted by MRRD in 2005 estimates a total Kuchi population of 2.5 million, 1.5 million of which remain active⁹. The NMAK found that the biggest cause of departure from the Kuchi lifestyle is the increased frequency and severity of droughts, driving many Kuchis to destock and live as internally displaced.

The United Nations Assistance Mission in Afghanistan (UNAMA) and Relief International (RI) consider Kuchis to be the most vulnerable minority group in the country. The Kuchis seem to have least benefited from international support over the recent past. The recent and projected climate change scenarios informing of more frequent and severe droughts, floods and high temperatures over the coming decades, threaten the migratory pastoralist livelihood system and way of life. A more inclusive strategy is required to chart the way forward for support to the Kuchi households continuing the pastoralist lifestyle and supporting those that would like to opt for a more sedentary lifestyle. The latter group are highly vulnerable as they have no other skill or land to adopt alternative livelihoods.

⁹ https://www.academia.edu/22175232/National_Multi-sectoral_Assessment_on_Kuchi

The rapid assessment focussed on Kuchi households as a unique group with unique set of threats and opportunities. The questions were asked in relation to 2019, which is considered an average year in terms of weather-based disasters and security. Slightly over 69% of the respondents reported that they are able to access pastures regularly and only 8% reported inability to access their regular pastures (Table 14).

Table 14: Key challenges to Kuchis compared with 2019, % of respondents

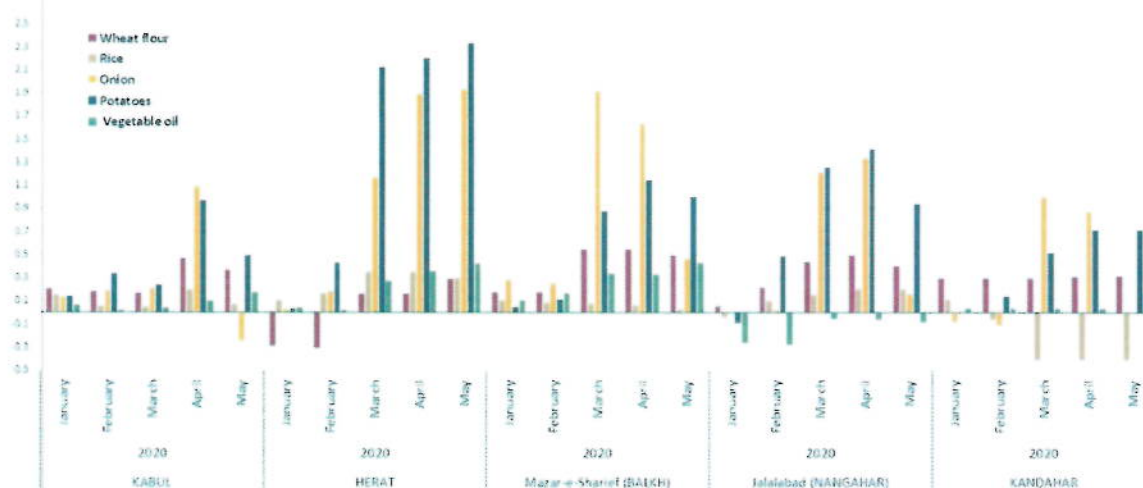
Kuchis	%
Movement restrictions	
Kuchis are able to move their flock to grazing areas	69
Kuchis are not able to move their flock to grazing areas	8
Kuchis are able to move their flock in specific areas only	20
Livestock sale restrictions	
Kuchis are able to sell their livestock	48
Kuchis are not able to sell their livestock	12
Kuchis are able to sell their livestock in limited areas	34
Marketing challenges	
Transportation costs	44
Livestock prices are low compared to last year	37
Roads/market closure	15
Other	5
Access to fodder	
Kuchis have access to adequate fodder	47
Kuchis do not have access to adequate fodder	53
Variation in fodder prices	
Prices are similar to last year	24
Prices have increased	76

Over 34% of Kuchis reported their ability to sell their livestock in limited markets and 12% reported inability to access markets. The key reasons were high transportation costs (44%), lower prices for livestock (37%) and market/road closures (15%). The great majority of Kuchis would sell limited number of livestock at the start of spring when animal fattening is feasible, which may explain the relatively high number of households reporting ability to regularly access markets (69%). Fodder is highly critical when flocks travel between winter and summer pastures especially during the weeks leading up to spring. Over 53% of Kuchi households reported inability to access adequate fodder and 76% reported higher prices for fodder this year compared with 2019. The inability to access pastures and lack of affordable fodder may cause distress selling and some destocking, adding to an already vulnerable group and their worries.

C.8 FOOD PRICES

Food prices in several markets increased with the onset of COVID-19 in Afghanistan. Much of the price hikes in March and April 2020 were due to panic buying and opportunistic price fixing among some traders. Wheat flour prices in some markets initially caused some concern but the government seems to have managed to control prices through a number of measures. Prices of potatoes and onions, as key ingredients of national cuisine, dramatically rose in all markets, owing to exports and panic buying by some consumers. Concerted efforts by the government, including measures to curb hoarding, price fixing and wholesale trader collusion in addition to import facilitation brought prices of key food commodities under control. In May 2020 prices for key food items were significantly lower than the preceding two months but still relatively higher than the average of prices at the same time in 2018 and 2019. Figure 6 presents the relative price differences between January and May 2020 and averages for the same months in 2019 and 2018.

Figure 6: Retail price in 2020 as a share of the 2018-2019 averages for selected food items and markets



Source: National Statistic and Information Authority (NSIA), Consumer Price Index (CPI).

The on-set of COVID-19 had an upward pressure on the general consumer price index (CPI), prices of non-food items also rose. However, the food prices rose significantly higher than non-food prices. Figure 7 presents the monthly consumer price index (CPI) for the first five months of 2020, 2019 and 2018. The price hike in March and April 2020 forced many households, in particular the 55% of the population living below the poverty line, to reduce the number of meals and the quantity of food they could eat. Furthermore, the great majority of the poor and vulnerable households were working as daily wage earners, which was no longer a viable option with curfews and other restrictions as part of the government's containment efforts.

The CPI for May 2020 is lower than the same time in the preceding two years, which is a testimony to successful government efforts to control prices. The high food prices in March and April 2020 negatively affected the net-consuming food deficit farmers who rely on markets for their food for at least some months of the year. Furthermore, the great majority of the small holder farming households top up their income by engaging in casual labour or small-scale trading, which were severely affected by the COVID-19 containment measures. The great majority of smallholder farmers have had to resort to painful coping

mechanisms including eating their seeds¹⁰ and selling some of their productive assets. If not supported this is likely to have significant repercussions for crop production over the next season.

Figure 7: Consumer price index, selected months 2018-2020



Source: National Statistic and Information Authority (NSIA), Consumer Price Index (CPI).

¹⁰ Most farmers keep grains from one year to the next as seed, which are similar to grains for food.

D. KEY MEASURES TO SUPPORT THE FOOD AND AGRICULTURE SECTOR

The assessment sought all groups of respondents to list their top three priorities to help reduce the impact of COVID-19 and other key impediments. This section presents key priorities from respective groups of respondents. The priorities are listed as expressed by each group. The report has not attempted to reorganise the priorities or issue any value judgements on the efficacy of priorities – in terms of technical, financial and impact efficiencies. These issues are expected to be addressed at the subsequent stage when response is formulated. The priorities are not always feasible to organise in short and medium term as not to distort the priorities expressed by specific groups along the agriculture value chain.

D.1 TRADER PRIORITIES

Table 15 presents key priorities as suggested by two groups of traders, small traders operating at the district and province level and large traders operating at national and international markets. The data does not include priorities by women traders, simply because women participation in the trading is almost non-existent and no female trader could be interviewed. However, female farmers have included participation in the market as one of their top priorities (see Table 16).

Table 15: Trader priorities. % of respondents

Actions the government must take to support traders	Small traders/1, priorities			Large traders/2	Sum
	First	Second	Third		
Formal market spaces and facilities	25	14	21	-	60
Improve transportation infrastructure and manage costs	20	19	19	5	62
Improve micro-finance along the value chain (producers, transporters and traders)	14	11	16	-	41
Establish price control/reduce taxation	12	19	12	-	42
Provide storage/processing/packaging facilities	9	13	9	7	39
Trade facilitation (provide certificates, sign trade agreement)/reduce tariffs	7	1	2	59	69
Lift COVID-19 movement/opening restrictions	6	3	9	10	27
Improve security/eradicate corruption	6	8	3	15	32
Increase awareness on COVID-19 and provide essential equipment to limit the spread	1	3	-	-	5
Improve linkages between traders and producers	-	4	3	-	7
Prevent wholesalers from hoarding	-	3	6	-	8
Other	-	2	-	5	8

1. Small traders refers to street vendors/gawkers and small-scale buyers from farmers.

2. Large traders refers to intra-provincial traders and exporters.

1. Support the development of formal market spaces in urban areas. The three top priorities from small traders (60%) is focussed on creating formal and safe markets where hawkers and small traders can safely operate with some certainty without harassment. Hawkers/informal street vendors conduct the great majority of retailing for vegetables and fruits and to a certain extent cereals and legumes. The likelihood of losing one's space or harassment by authorities and shop owners is relatively high, periling investment in retailing and a key source of livelihoods for many households. Food safety and safety of trading as well as linkages with producers are regularly compromised for lack of an established and secure location.

2. Improve transportation infrastructure and manage costs. Transportation is usually not available or prohibitively expensive for lack of feeder/access roads to many locations. Over 57% of small traders and 5% of large traders mentioned transportation as a key impediment to trading. Rural access roads if developed could link farmers directly to markets and significantly reduce transportation costs.

3. Facilitate access to micro-finance. More than 41 of small traders mentioned lack of micro-credit as a key impediment to their business development. Farmers and small traders rely on informal lenders for urgent capital injection. The informal lenders charge exorbitant interest rates in different forms and are mostly not available to many. The promotion of reliable and affordable micro-credit is likely to improve productive activities among farmers and small traders.

4. **Price management, reduced rents and taxation.** Price management here refers to monopolistic price manipulation practices by some traders to drive out small traders. Rents and taxation usually refers to the rents and bribes the hawkers are usually coerced to pay for retailing locations. Over 42% of small traders suggested this measure, which may be addressed through the first recommendation.

5. **Provision of storage, processing and packaging facilities.** These refer to safe cold storage and physical spaces for primary processing, grading and packaging. Nearly 39% of all traders, including 7% of large traders suggested this measure to promote trading and reducing waste. These facilities may also be considered under the proposed first measure.

6. **Trade facilitation – export certificates, improved trade agreements with neighbours and reduce tariffs.** Over 59% of the large traders and 10% of small traders mentioned this as key to their business. Trade facilitation with neighbouring countries is vital to ensure trade routes remain open for both food exports and imports. Any temporary closure of borders over late spring and summer months usually results in very high losses as there are insufficient or no cold storage facilities in the country. This measure needs to be seriously and urgently considered by the responsible government authorities.

7. **Lift Covid-19 related movement restrictions and open markets.** Over 27% of all traders, including 10% of large traders, have mentioned this measure as a priority. However, safety measures necessary for opening markets is least likely to be implemented among street hawkers, most of whom, by definition, trade illegally on unauthorised public spaces. Some COVID-19 safety measures may be considered in the very short term but the implementation of the first proposed measure (see above) is necessary for food safety and safety of operation in food retailing.

D.2 CROP PRODUCER PRIORITIES

Table 16 presents gender disaggregated farmer priorities for support, which was in response to a question on cultivating the next crop and sustainable crop production over the coming years. Surprisingly, the measures directly related to COVID-19 containment and treatment appear at the bottom of the list. This is perhaps a reflection of the fact that farmers are not directly affected by the COVID-19 restriction measures but are rather indirectly affected through market linkages for inputs and outputs. Part of the responses for pests and diseases, indicated as the last priority, are included under technical capacity development.

Support to access seeds and fertilisers is the top priority for both men and women farmers. Irrigation and flood control followed by cold-storage facilities for vegetables and fruits are among the top priorities for female farmers.

Table 16: Crop producer priorities for support, Number and % of respondents

FARMER PRIORITIES	Cereal producers		Veg. producers		Fruit producers	
	Women	Men	Women	Men	Women	Men
Provide seeds and fertilisers	44	53	34	35	18	4
Establish storage facilities (Cold storage, warehouses, silos)	6	8	28	15	19	29
Support agriculture mechanization	8	12	-	7	3	28
Establish greenhouses	-	-	8	13	3	1
Establish agriculture markets, improve trader-farmer linkages, lift restrictions. Provide market space for women.	1	11	9	15	19	22
Irrigation/Flood control	21	4	11	8	1	-
Promote public procurement /institutional purchase to support both men and women farmers	-	4	-	1	-	4
Facilitate micro-finance to producers at affordable rates	1	1	-	1	1	1
Capacity development, introduction of new technologies and methods throughout the crop value chain. Enhance extension services.	4	3	9	2	18	8
Provide COVID-19 awareness, protective gear, testing and treatment.	7	3	-	1	-	-
Support pest and disease control	-	1	-	2	15	3
Provide access to land and facilities to women	6	-	-	-	3	-
Enhance women's participation in food value chain (prod, processing, marketing)	1	-	-	-	-	-

The crop producer priorities are briefly discussed below.

1. Provide seeds and fertilisers to enable the next crop production. The great majority of smallholder farmers are net consumers, relying on markets for some months of the year, in particular during the months leading up to crop harvest. This coincided with the on-set of the pandemic and high food prices, which many consumers could not afford. Many smallholder farmers tapped into their meagre savings and when that was not sufficient, they were left with no alternative but to eat their seeds as well. Nearly 52% of male and 44% female cereal farmers and over 35% of male and nearly 34% of female vegetable farmers requested support for seeds and fertilisers as a top priority to enable the next crop cultivation. Over 18% of female farmers compared with 3.5% male farmers requested supported for orchards and fruit cultivation.

2. Support the establishment of storage facilities, including cold storage, ventilated warehouses and silos. Post-harvest losses are usually very high and sometimes farmers and traders have no choice but to sell at any price rather than lose the entire crop for lack of appropriate storage. The COVID-19 restrictions have made this situation painfully more evident and stark. The second top priority of vegetable and fruit producing farmers is cold storage, in particular, but also other storage facilities. More than 28% of female and about 15% male vegetable farmers mentioned cold storage facilities as their top priority.

3. Support to agriculture mechanisation – for land preparation, harvesting and processing. Nearly 28% of male fruit producers and 11.5% of male cereal producers mentioned this as one of their top priorities. Only 8.5% of women respondents requested support for cereal crop mechanisation mainly related to post-harvest operations, which are the prerogative of women.

4. **Support to the establishment of greenhouses.** Access to and availability of off-season vegetables and fruits are key factors affecting farmer income and diet diversification. The greenhouses enable farmers to use small parcels of land highly productively and facilitate urban agriculture for many poor households. Nearly 13% of male and 8% of female vegetable producers requested support to establish greenhouses. With adequate information on greenhouses and their relevance to women, the request would have probably been very high from female farmers.

5. **Establish agriculture markets and improve market-farmer linkages.** Lack of adequate and reliable physical market spaces are key impediments to commercial agriculture, which the traders also mentioned as a top priority. This priority also includes improved market linkages and feeder roads linking districts and villages to the main road. More than 22% of male and 19% of female fruit producers, almost 8% of male and nearly 11% of female vegetable producers requested support for marketing. Most of the women suggested dedicated spaces in markets for women to enable participation and integrate production and marketing.

6. **Irrigation expansion/rehabilitation and flood control.** Without irrigation crop cultivation is, by and large, not feasible. The small rain-fed cereals in the highlands is usually a high-risk endeavour. The frequency and severity of floods have significantly increased over the recent past, increasing the risk of damaging prime agriculture land, houses and infrastructure. Usually support to irrigation rehabilitation and flood control is a top priority for many farmers around the country. Surprisingly more women requested for irrigation than men did, which might be linked to the multiple uses of irrigation water, including domestic use, where women hold the sole responsibility as part of social division of labour.

7. **Promote public procurement of domestically produced agricultural products.** Institutional purchase by key public institutions such as the ministries of defence, interior, public health and education can go a long way to absorb some if not all of the surplus production. If appropriately organised, institutional purchase of agricultural products can have significant impact on the agricultural sector, market and farmer livelihoods.

8. **Facilitate micro-finance to producers at affordable rates.** Access to formal credit in rural areas is mostly not available. Informal lending is available to some farmers at exorbitant rates, which makes it unattractive for investment in agriculture. Affordable rural-credit can go a long way to unlock the agricultural potential in the country.

9. **Capacity development and introduction of new and appropriate technologies in agriculture.** The great majority of agricultural activities are traditional with very little improved technologies. Most farmers continue to practice what has been practiced through generations with very little modern inputs and precious little has been done to introduce new technologies and technical knowhow. On average more female than male farmers requested support for capacity development, which seems to be a key impediment to women entering farming and for some activities they continue to depend on male farmers. Over 18% of female compared with about 8% male fruit farmers and 9.5% of female and 2.3% of male vegetable farmers requested technical capacity development as a key priority.

D.3 LIVESTOCK FARMER PRIORITIES

Most of the livestock farming is a mixed crop-livestock system, mostly small ruminants and dairy. Except some newly established poultry farms, the great majority of rural households raise some backyard poultry on small scale. Women usually play a key role in backyard poultry farming, small ruminants and mixed livestock-crop farming. Table 17 presents key priorities mentioned by male and female livestock farmers. The gender-disaggregated priorities reflect the relative roles and responsibilities of men and women in agriculture. Some of the top priorities include support to establishing modern poultry and livestock farms, establish cold-chain for meat and dairy products and veterinary services among others. Disease control, introduction of improved breeds, market linkages and support to access animal feed are among some of the key priorities of poultry and livestock farmers.

Table 17: Poultry and Livestock farmer priorities by gender, % of respondents

Poultry and livestock farmer priorities	%		
	Women	Men	All
Support male and female farmers establish farms, restock, introduce high yielding breeds and rehabilitate pastures.	36	36	36
Support standardised post harvest value addition	5	20	19
Provide animal feed, improve access to affordable feed.	11	14	14
Support the establishment of cold storage, freezers, refrigerator	24	9	10
Establish physical market/ access to market/Improve linkages along the value chain	11	5	6
Support the provision of vaccines, medicines and veterinary services	5	5	5
Public procurement/Control on prices and import/Support export	3	3	3
Provide rural credit and technical support	1	3	3
Provide electricity to rural areas	-	3	2
Provide technical training, Improve awareness on animal diseases and prevention	1	2	2
Enhance women's participation in livestock farming	1	-	-
Other	-	2	2

1. Support to establish new farms and introduce high-yielding stock species. Over 36% of male and female farmers, in equal proportions requested support to establish livestock farms, access to high-yielding stocks and rehabilitation of pastures.

2. Support to post-harvest value addition: The second top priority, mostly from male farmers, nearly 20% of male compared with 5.4% female farmers, requested support for post-harvest processing and reducing losses. This priority reflects inadequate processing and value addition as well as high levels of post-harvest losses in the sector.

3. Provide animal feed and improve access to affordable feed: Most of the animal feed are imported and there is very little capacity to produce feed in the country. Animal feed prices are usually beyond the reach of many farmers, a key reason for lack of transformation in the sector. Emergency provision of animal feed, in particular for poultry is a key priority, especially among women, to keep their poultry alive and productive over the coming season. Nearly 11% of female farmers and almost 14% of male farmers requested support for animal feed.

4. Support the establishment of cold storage and refrigerated transportation: More than 24.3% of female and 8.6% of male farmers requested for this support, reflecting key division of labour in managing poultry and dairy at the household level.

5. Establish livestock markets in particular for poultry: Nearly 11% of female and 5.2% of male farmers requested this support. Usually street vendors sell poultry and other animal products under highly unhygienic conditions where women are excluded from retailing. The request for marketing support involves secure market places with dedicated spaces for women retailers. This was also requested by traders (D.1.1.) and farmers (D.2.5). Facilitating the engagement of women in livestock marketing is likely to have significant impact on the lives and livelihoods of women as their role is prominent in production and rudimentary processing but are cut off from markets.

6. Support to provision of vaccines and veterinary services: Mortality rates among poultry and livestock are significantly high and hence the reasons for vaccination and veterinary services in general to appear among the top priorities. The request for vaccination and other veterinary services are similar for both men and women

D.4 KUCHI PRIORITIES

The assessment asked two specific questions from Kuchi households and members of the Kuchi National Council regarding their priorities for support. The first set of questions related to immediate and emergency support in the face of COVID-19 and the second set related to medium-long term measures to support the Kuchi households. Table 18 presents the top priorities as expressed by respondents to each of the two sets of questions.

Table 18: Key priorities expressed by Kuchis, % of respondents

Priorities for support	Kuchis & Council Priorities			Sum
	First	Second	Third	
Emergency measures				
Provide COVID-19 awareness, protective gear, testing and treatment.	22	27	33	82
Provision of emergency animal feed to save stock	28	13	24	65
Food aid at the time of distress (COVID, drought, limitation of access to pastures and frost).	15	13	9	37
Medium-long term measures				
Alternative livelihoods, permanent settlement and capacity development.	36	42	22	100
Veterinary services (vaccination, disease control and treatment)	22	22	33	77
Improve access, rehabilitate and restore common property rights to pastures.	24	13	24	61
Access to public health and education, conducive to the Kuchi way of life	22	16	20	58
Improve markets, livestock processing facilities (market spaces, slaughterhouses, hide and dairy processing).	8	13	26	47

EMERGENCY/IMMEDIATE PRIORITIES:

1. COVID-19 awareness, protective gear, testing and treatment support. As part of the emergency measures, support related to COVID-19 features as the top three priorities of 82% of the respondents. This also reflects the fact that the Kuchis, after women, are the least aware of COVID-19 information and least understand where to obtain information (See section C.6).

2. Provision of emergency animal feed to save stock. Over 65% of the respondents have suggested emergency feed supply as their top three priorities. Animal feed provision featured among the first priority of 28% of respondents. Restrictions on the movement of Kuchis to access pastures in a short window of opportunity and the risk of losing key stock are the reasons for this measure to feature as a top priority.

3. **Food assistance.** Nearly 37% of respondents requested food assistance as one of their top three priorities. This is a reflection of the Kuchi vulnerabilities and lack of consumption cushioning, where small changes in conditions governing the Kuchi livelihoods can impair food security at an alarming speed.

MEDIUM-TERM PRIORITIES:

1. **Alternative livelihood development, permanent settlement and capacity development.** All respondents requested support to facilitate changes in adopting alternative livelihoods and resettlement. This is one of the most striking features of the assessment findings, reflecting recent hardships and the high risks involved in continuing the nomadic lifestyle. Climate change and conflict over access to traditional pastures seems to have compelled many Kuchis to consider sedentary lifestyle and alternative livelihoods. The transition is certainly not easy, which is likely to require significant resources and efforts. Over 36% of all respondents mentioned alternative livelihood development as their first priority and 42% as a second priority. In view of the recent trends in the severity and frequency of weather-based disasters and projected climate change scenarios, the Kuchi way of life is likely to be less viable in the long term.

2. **Provision of veterinary services, including vaccination, disease diagnostics and treatment.** Over 77% of the respondents mentioned veterinary services among their top three priorities. Recent surges in livestock mortality, spread of diseases and loss of valuable stock are key reasons for this as the second top priority among the Kuchis. The great majority of Kuchis do not seem to have adequate access to veterinary services, which is also a peril to all livestock in the country through the spread of disease.

3. **Improved access, rehabilitation and reinstating common property rights to pastures.** More than 61% of respondents mentioned access to pastures and rehabilitation among their top three priorities. A number of consecutive droughts have severely affected pastures throughout the country. MAIL has made some efforts to rehabilitate some pastures but more resources are required to address the situation at scale. Encroachment on pastures and ownership claims have made a large part of the pastures inaccessible. This has severely affected the rights of access of many Kuchis to traditional and hence a key threat to their way of life. There are frequent disputes between Kuchi and sedentary communities across the country, which requires immediate attention to reduce the risk of further escalation.

4. **Facilitate access to public health and education.** The great majority of Kuchi households do not have access to a number of publicly provided services, in particular health and education. Over 58% of the respondents mentioned access to public health and education as their top three priorities. Indeed, the Kuchi way of life and adapting public services to their particular needs are key impediments to delivering public services to Kuchi households.

5. **Improve access to markets and livestock processing facilities.** The Kuchis rely on functioning markets to trade their stock, which is mostly in live animal form. Access to more value addition facilities such as dairy, animal hide, slaughterhouses and other processing is likely to increase incomes. In some locations, physical market places do not exist or access is denied to Kuchis.



E. CONCLUSION AND RECOMMENDATIONS

The MAIL-FAO partnership and the resulting rapid assessment has been highly successful in identifying key COVID-19 impact on agriculture and food systems across key agro-ecological zones of the country. The assessment was conducted in record time under challenging circumstances. The results of the assessment provides a lucid picture of the COVID-19 impact on the agriculture sector some of which are structural issues and some directly relate to COVID-19. The underdeveloped value chains, weak market linkages, inadequate infrastructure and low technical knowhow are key challenges facing the food systems in Afghanistan, which the COVID-19 has further exacerbated. The coping capacities among farmers and consumers are highly limited and the assessment suggests that more than 20% of the smallholder and vulnerable farmers may not be able to plant the next crop.

Building resilience and enhancing coping strategies require addressing urgent needs of the farmers coupled with addressing structural impediments to the agriculture and food system transformation. Male and female farmers, traders, processors and pastoralist nomads (Kuchis) have highlighted key needs and priorities to address both urgent and structural issues in the agriculture and food system. Some of the key recommendations are summarised below.

- Address the immediate needs of vulnerable farmers to enable planting the next crop. The initial spike in food prices prior to harvest, when most farmers rely on markets for food, significantly affected the meagre savings of many farmers. The smallholder farmers had no choice but to eat the grains they usually keep as seed and small savings for fertilisers. Without urgent support, many farmers will not be able to plant the next crop, which is likely to have significant repercussions for food security in the country. It is necessary to consider the needs and priorities of male and female farmers separately as the type of agricultural activities and division of labour are clearly defined along gender lines.
- Addressing the immediate needs of farmers should be directly linked to addressing some of the structural impediments to agricultural transformation. All efforts should be made to promote seamless and direct linkages across the emergency, rehabilitation and development space. In this regard, building on lessons learned from the experiences of the past 17 years are highly valuable for the design and implementation of relevant interventions in the food and agriculture sector.
- Addressing structural issues inhibiting the transformation of food system in Afghanistan can go a long way to address immediate and development needs of the sector and ensure food security and nutrition. Agriculture marketing and market infrastructure interventions will not only address a key structural challenge in the food system but will also improve marketing efficiency, food safety and vertical integration of key agricultural commodities. Market infrastructure development is likely to provide employment for a large number of vulnerable households who have lost their jobs and the opportunity to earn a living but will also address a key impediment to value chain development. Female farmers and potential female traders have suggested specific physical spaces dedicated to women in retail markets as a top priority, which is likely to encourage active participation of women in the food system.
- COVID-19 related communication, while successful among men, seems to have failed women. The great majority of women suggest that they have not received any COVID-19 advice or information. Concerted efforts are necessary to target women specifically as key to COVID-19 containment agents.
- Livestock farmers have suggested a series of priorities to address emergency and structural needs of the sector. Women play a key role in managing small-scale poultry and livestock in mixed livestock-crop systems in Afghanistan. The gender-disaggregated division of labour will have to be carefully considered to ensure women are adequately included in any support to the livestock sector.
- The Kuchi pastoralists and their way of life has been under threat as a direct result of civil strife and the subsequent limitations to access their traditional pastures as well as consecutive and more frequent droughts over the past two decades. The great majority of Kuchis have lost their stock and most are languishing in internally displaced camps with very little or no opportunities to access alternative sources of livelihoods. Transition to a more sedentary life has proved highly challenging to most Kuchi households. Concerted efforts are needed to support the remaining Kuchis who wish to continue with the nomadic way of life and those choosing to settle. This report highlights some key priorities as expressed by the Kuchis, the interventions will need to be carefully considered to ensure externalities are minimised.
- Response formulation will need to be evidence-based and carefully consider the gender division of labour in the country. FAO and MAIL are best placed to draw on successful experiences of the past 17 years and support any emergency and structural interventions in the food and agriculture sector.

F. ANNEXES

ANNEX 1: LIST OF PROVINCES AND DISTRICTS IN THE ASSESSMENT

LIST OF PROVINCES & DISTRICT FOR COVID-19 ASSESSMENT IN AFGHANISTAN			
No.	Province	No.	Districts Names
1	Kabul	7	1-Paghman, 2-Khak-e-Jabar, 3-Char Asyab, 4-Sarobi, 5-Shakar Dara, 6-Qarabagh, 7-Gul Dara
2	Panjshir	3	1-Anaba, 2-Center (Bazarak), 3-Abshar
3	Wardak	4	1-Jaghato, 2-Narkh, 3-Jalrez, 4-Markaz Behsood
4	Herat	8	1-Injil, 2-Shindand, 3-Karokh, 4-Zandajan, 5-Ghoryan, 6-Pashtoon Zarghon, 7-Robat Sangi, 8-Adraskan,
5	Ghor	3	1-Firozkoh, 2-Taiwara, 3-Saghar
6	Farah	5	1-Pusht Rod, 2-Bala Bluk, 3-Pusht Koh, 4-Bakwa, 5, Lash-i-Jowain
7	Balkh	7	1-Balkh, 2-Sholgara, 3-Dehdadi, 4-Chamtal. 5-Nahri Shahi. 6-Khulm, 7- Dawlatabad
8	Faryab	7	1-Pashtonkot, 2-Khowja Sabzposh, 3-Belcheragh, 4-Qaisar 5- Qaramqul, 6- Sherin Tagab, 7-Dawlatabad
9	Badakhshan	14	1-Faizabad, 2-Mah may 3-Yaftal 4-Kishem 5-Baharak 6-Jurm 7-Darayeem 8-Shahr-e-Bozurg, 9-Wardooj, 10-Arghanchkhowa, 11-Ishkashem, 12-Shighnan, 13-Raghistan, 14-Kohistan
10	Kunduz	5	1-Kunduz City, 2-Imam Sahib, 3-Ali Abad, 4-Khan Abad, 5-Chardara,
11	Nangarhar	10	1-Khgyani, 2-Surkhroad, 3-Jalalabad, 4-Kama, 5-Kuz Kunar, 6-Gushta, 7-Rodat, 8-Bati Kot, 9-Momandara, 10-GhaniKhail
12	Kunar	7	1-Asababad, 2-Shegal, 3- Watapour, 4-Chawki, 5-Sarkani, 6-Asmar, 7-Manogai
13	Kandahar	8	1-Center Dand, 2-Daman, 3-Arghandab, 4-Takhtapul, 5-Panjwayee, 6-Spinbuldak, 7-Zerai, 8-Maywand
14	Helmand	5	1-Centre Lashkargah, 2-Nad Ali, 3-Nahri Siraj, 4-Nawa-e- Barakzai, 5-Garamsir
15	Zabul	4	1-Centre Qalat, 2-Shajoy, 3-Shahra-e-Safa, 4-Sheenki
16	Paktika	7	1-Yousuf khail, 2-Jani Khail, 3-Yahya Khail, 4-Argon, 5-Sorabi, 6-Center, 7-Matakhan
17	Khost	6	1-Tanai, 2-Sparay, 3-Mosakhail, 4-Zazi Maidan, 5-Alisher, 6-Bak
18	Bamyan	3	1-Waras, 2-Kahmard, 3-Yakawlang-1
18	TOTAL	113	

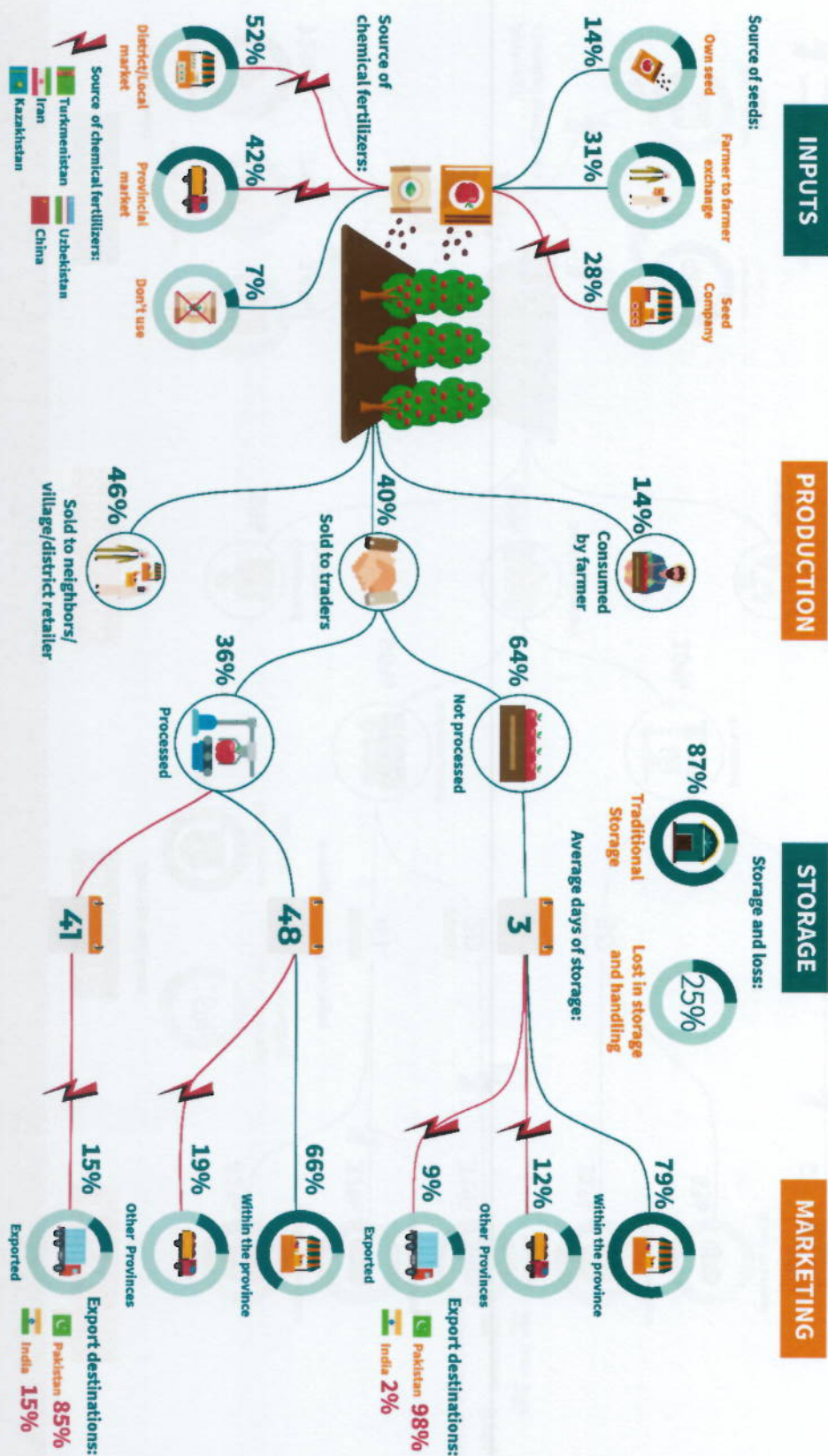
ANNEX 2: VALUE CHAINS FOR SELECTED CROPS

VALUE CHAIN - APPLE

PRODUCTION IN 2019:
Area cultivated: 27,600 Ha
Production: 250,300 Ton

EXPORT IN 2019:
Value: 10 million USD
Quantity: 22,000 Ton

SHARE OF AGR. EXPORT:
Apple: 1.4%



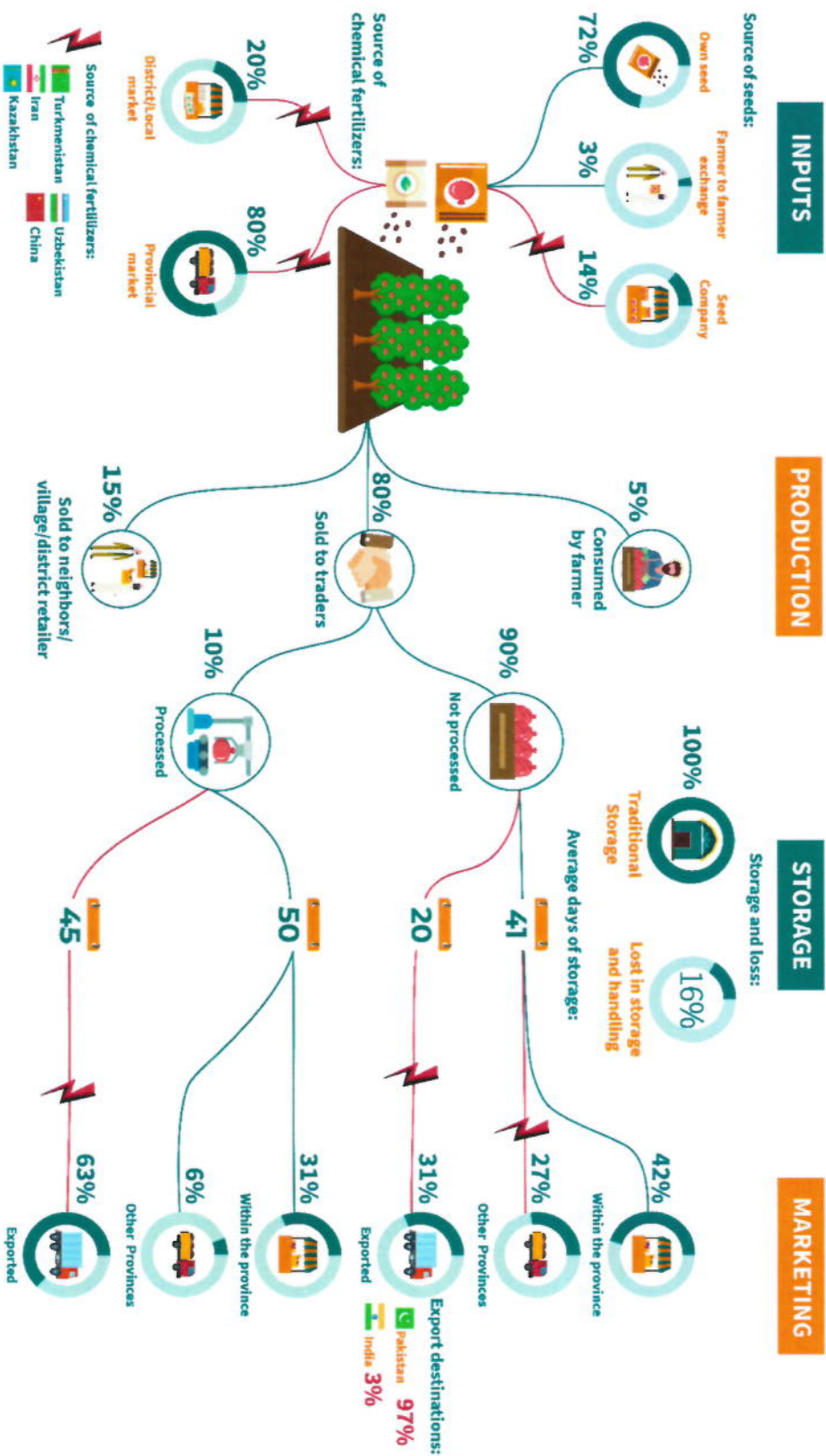
Potential COVID-19 vulnerabilities

VALUE CHAIN - Pomegranate

PRODUCTION IN 2019: Area cultivated: 18,000 Ha
Production: 154,500 Ton

EXPORT IN 2019: Value: 14.8 Million USD
Quantity: 61,100 Ton

SHARE OF AGR. EXPORT: Fresh pomegranates: 2%



Potential COVID-19 vulnerabilities

VALUE CHAIN - TOMATO

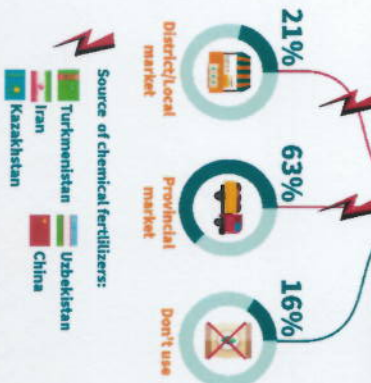
PRODUCTION IN 2019: EXPORT IN 2019:
 Area cultivated: 19,800 Ha Fresh: 24.1 million USD/174,600t Share of Agri. Export: 3.3%
 Production: 385,800t Processed: 1.7 million USD/12,320t Processed: 0.2%

INPUTS

Source of seeds:



Source of chemical fertilizers:



Source of chemical fertilizers:
 Turkmenistan
 Uzbekistan
 Iran
 China
 Kazakhstan

PRODUCTION



Sold to traders



Storage and loss:



STORAGE

MARKETING



Other Provinces



Export destination:
 Pakistan 99.9%

Within the province



Export destination:
 Pakistan 99.8%

Potential COVID-19 vulnerabilities



