

**STATE COMMITTEE ON STATISTICS
REPUBLIC OF TAJIKISTAN**

INFORMATION BULLETIN

**FOOD SECURITY AND POVERTY
IF THE REPUBLIC OF TAJIKISTAN**

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Statistical service is one of the effective methods for establishing the order and evaluation of prospects of economic agents activity. Under the conditions of market economy, it is not possible to insure the sustainable development without proper accounting, work analysis and resource planning.

In this respect, and in accordance with legislation, all enterprises, organizations, institutions, and all production and non-production subjects, independently of their form of ownership, have to submit all required complete and accurate reports in due time to the statistical bodies. Thereby, statistical recording is to be indispensable, complete and unexceptional on the whole territory of the republic.

Relevant state authorities have to take required actions to bring accounting system into the line with international standards.

EMOMALI RAHMON

Introduction

In accordance with European Commission Matrix on Policy Reform of Memorandum of Understanding on Food Security Program in the Republic of Tajikistan the decision about preparation and publishing of Quarterly Food Security Bulletin was made to ensure system of reliable operative information and analysis of current food security situation in the Republic of Tajikistan.

“Food security presumes that all people have access, at all time, to sufficient food required for an active and healthy life. Food security also means physical availability of food in sufficient quantities, accessibility of those foodstuffs for households (through the market and other sources, that suppose sufficient purchasing power), as well as consumption of food in quantities required for satisfying of nutritional needs”.

The purpose of the Bulletin is to bring together and systematize available information on food security in Tajikistan; i.e. the availability of food in the republic and outlook for food production, indicators on access to food, food use and utilization. The Bulletin also contains analysis of current food security situation in the Republic.

The base indicators for Food Security Bulletin are production of food, food availability and accessibility, areas under crops, agricultural production and productivity, main climatic conditions, health indicators, water supply, prices, and quantitative indicators reflecting situation on food market.

The Appendices to the Bulletin show indicators of Poverty Reduction Strategy Paper, information on nutritional status of various socio-economic groups of the population, as well as estimated data on food balance.

The presented Quarterly Food Security Information Bulletin of Tajikistan was prepared by State Committee on Statistics with participation of key Ministries and Departments (Ministry of Finance, Ministry of Health Care, Ministry of Labor and Social Protection of Population, Ministry of Education, Ministry of Transport and Communication, Hydrometeorological Agency under the Committee for Nature and Forestry Protection of the Republic of Tajikistan, etc.). The publication is prepared with technical and financial support of European Commission in the Republic of Tajikistan.

The publication is intended both for specialists and all interested persons.

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OVERVIEW

According to preliminary estimates, Gross Domestic Product (GDP) in January – March 2008 increased by 3,2% as compared to the corresponding period of 2007 (in constant prices). The biggest impact was due to increase of production in industry, trade, agriculture, and services.

Monthly inflation rate in consumer's sector made up 0,87% (against 0,73% in the corresponding period of the previous year).

In January – March 2008, farms of all categories produced 17732 tons of meat (or 109,4% as compared to the similar period of the previous year), 108690 tons of milk (104,2%), and 27800 thsd.pieces of eggs (104,5%).

In March 2008 consumer's prices of most basic foodstuffs increased significantly as compared to December 2007, except of prices cotton oil, eggs and carrot.

Share of expenditures for food among vulnerable groups of population increased up to 3%.

In total structure of household's expenditures for food, bread and bread products occupies the first place (34.9%).

Consumption of food products varies by decile groups of the population. Thus, during the first quarter of 2008 average per capita consumption of potatoes in 10% most well-off population group exceeded that in 10% least well-of population group by 70%, meat and meat products – by 6 times, eggs – 3 times, fruits – by 2.4 times.

The cost of *consumer's basket*, at actual consumption (according to household survey 2006) amounted to 82,92 somoni per one household member in prices of end of March 2008, while the cost of food basket according to rational nutritional standard would amount to 156,53 somoni.

In January – March 2008, 29,6 thsd.persons were on leave on initiative of administration, of them 8,2 thsd.persons (27,7%) were on leave without pay. 1,5 thsd.persons were working during incomplete working week / working day. Unemployment rate, including hidden unemployment, amounted to 3.9% of economically active population. As of the end of March 2008, total arrears in salary payments for the republic (inclusive of arrears for previous years) amounted to 21598,4 thsd.somoni, of which arrears for March 2008 accounted for 9,2%.

As of the end of March 2008, the number of vacancies, offered by enterprises through employment offices increased by 0,5% as compared to the similar period of 2007, and amounted to 13,8 thsd. places. At the same time, the number of vacancies for blue-collar job decreased by 10,1% and amounted to 5,4 thsd. (39,4% of total number of vacancies).

The highest arrears in salary payments are observed in real sectors: 13986,6 thsd.somoni (64,8% of total arrears) in agriculture, 2974,9 thsd.somoni (13,8%) in industry, and 1461,4 thsd.somoni (6,8%) in construction.

In the first quarter of 2008 incidence of infection diseases among population decreased by 7,8% as compared to the first quarter 2007. Cases of acute enteric infections account for 29,7% of total number of infection diseases. As compared to the similar period of the previous year, number of cases of acute enteric infections decreased by 13,5%, of which cases of typhoid fever – by 67,5%, and bacterial dysentery - by 3,1%. During the reporting period, increase in number of cases of tuberculosis among children of 0-14 years old by 5% as compared to the first quarter of 2007 was observed. Number of cases of brucellosis increased by 47%.

As of 1 January 2008, 71229 persons received monthly social benefits, of them 33952 persons (47,7%) were disabled persons. The size of social benefit is liken to minimum old age pension. The average size of social benefit in 2007 was 25,87 somoni.

CHAPTER 1. SOCIO-ECONOMIC INDICATORS

The mentioned below socio-economic indicators depict overall economic situation in the country, required for analysis of food security situation.

1.1 GROSS DOMESTIC PRODUCT

According to preliminary estimates, Gross Domestic Product (GDP) for January – March 2008 was valued at 2725695,7 thsd.somoni, and increased by 3,2% as compared to the corresponding period of 2007 (in constant prices).

The biggest impact was due to increase of production in industry, trade, agriculture, and services.

Table 1: Main socio-economic indicators

	2006	2007 ¹	1 quarter 2007	1 quarter 2008 ¹
Population, as of the end of period (million)	7,1	7,2	7,1	7,3
Nominal GDP (mln.somoni)	9335,2	12779,7	2041,5	2725,7
of which (in %):				
agriculture	21,5	19,8	8,3	6,6
industry	21,3	15,4	20,8	16,3
services	40,6	44,1	43,9	45,2
GDP per capita (somoni)	1335,1	1771,2	-	-
GDP growth , in % to the corresponding period of the previous year	7,0	7,8	5,3	3,2
State budget deficit / surplus (as percentage of GDP)	0,4	1,7	9,0	11,2
Consumer Price Indices, in % to the corresponding period of the previous year	111,9	121,5	118,1	126,2
Price Indices for foodstuffs	113,6	120,7	120,3	133,0
Price indices for services	118,6	127,1	127,8	122,0
Exchange rate of somoni (per 1 US Dollar)	3,2983	3,4426	3,4372	3,4573
Officially registered unemployment rate	2,2	2,5	2,3	2,5

	2006	2007 ¹	1 quarter 2007	1 quarter 2008 ¹
Number of registered unemployed, thsd. persons	47,7	51,7	49,4	52,7
in % to the corresponding period of the previous year	112,2	111,2	100,8	106,7
Monthly average wages and salaries (somon)	116,26	163,27	146,52	209,45
in % to the corresponding period of the previous year	139,1	140,4	148,4	142,9
Trade balance (mln.USD)	-326,4	-987,3	-156,8	-358,1
Share of food in total imports, %	11,3	11,9	12,8	14,8
Share of food in total exports, %	2,7	3,5	3,0	3,1

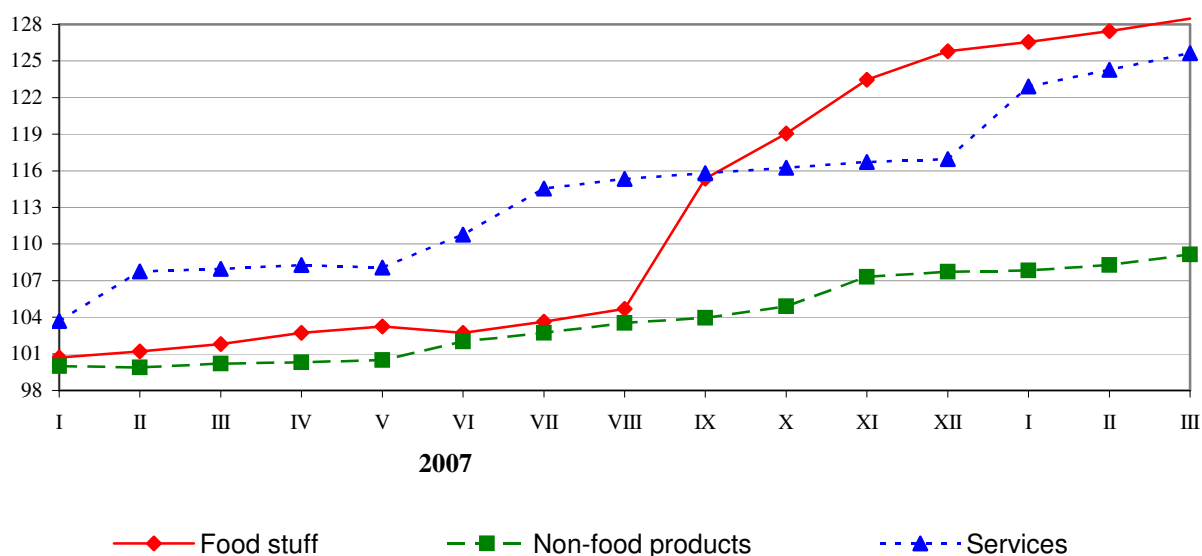
1) – preliminary data

Source: State Committee on Statistics

1.2 Price and Tariff Indices

In January – March 2008, consumer price index constituted 102,6%, of which for foodstuff – 102,1%, non-food products – 101,4%, and paid services to population – 107,4%. Monthly inflation rate in consumer’s sector made up 0,87% (against 0,73% in the corresponding period of the previous year).

Graph 1: Consumer price indices for foodstuff, non-food products and paid services (at the end of each month, in % to December 2006).



In the first quarter 2008, the increase of prices of foods outpaced those of non-foods. More detailed information on prices of food is available in the section 3 “Access to food”.

1.3 Foreign trade

In January-March 2008, foreign trade turnover of the Republic of Tajikistan including electric power and natural gas was valued at 1032,6 million USD, which is higher by 140,7 mln.USD (or 15,8%) than in January-March 2007. The gap between exports and imports determined the deficit of trade balance valued at 358,1 million USD. Tajikistan had foreign trade operations with 77 countries, of which 11 CIS countries and 66 far abroad countries.

In January-March 2008, volume of exports amounted to 337,3 mln.USD, which is less by 8,2% or 30,3 mln.USD than in the similar period of 2007. Volume of imports amounted to 695,3 mln.USD, which is higher by 32,6% or 171,0 mln.USD than in January-March 2007.

In March 2008 volume of exports increased by 2,2 times as compared to February 2008, and volume of imports increased by 2,1 times.

Major plant products in exports were fruits (7277 thsd.USD) and vegetables (973 thsd.USD), while in imports it were wheat (17344 thsd.USD) and flour (30589 thsd.USD).

1.4 Labor market

According to preliminary estimates, the number of economically active population (employed and officially registered unemployed) in March 2008 was 2069,0 thsd.persons, of them 2016,3 thsd.persons (97.5%) were occupied in the economy, and 52.7 thsd.persons (2.5% of economically active population) had official status of unemployed.

In March 2008, 6,7 thsd.persons applied to employment offices for a job (which is less by 4,1% than in the corresponding period of 2007); 2,4 thsd.persons (36,0% of total number of unemployed applied) were provided with employment assistance (less by 1,4% than in the corresponding period of the previous year).

From the beginning of 2008, 17,7 thsd.persons applied to employment offices for a job (which is almost close to the level of 2007), of them 41,1% (7,3 thsd.persons) were young people aged 15-29. All applied persons were unemployed, of them, 61,9% (11,0 thsd.persons) did not have a profession, and 49,1% (8,7 thsd.persons) didn't have a qualification.

As of the end of March 2008, the number of vacancies, offered by enterprises through employment offices increased by 0,5% as compared to the similar period of 2007, and amounted to 13,8 thsd. places. At the same time, the number of vacancies for blue-collar job decreased by 10,1% and amounted to 5,4 thsd. (39,4% of total number of vacancies). As compared to February 2008, number of vacancies offered by enterprises through employment offices increased by 14,6%. In March 2008 there were 5 free persons per one declared vacancy (against 4,9 persons in March 2007).

Hidden unemployment means underemployment, when a part of workers are on forced leave or work during incomplete working week / working day due to downtime. In January – March 2008, 29,6 thsd.persons were on leave on initiative of administration, of them 8,2 thsd.persons (27,7%) were on leave without pay. 1,5 thsd.persons were working during incomplete working week / working day. Unemployment rate, including hidden unemployment, amounted to 3.9% of economically active population.

Increase of real wages and salaries (deflated by the CPI) in March 2008 made up 2,5% as compared to February 2008, and 11,9% as compared to March 2007.

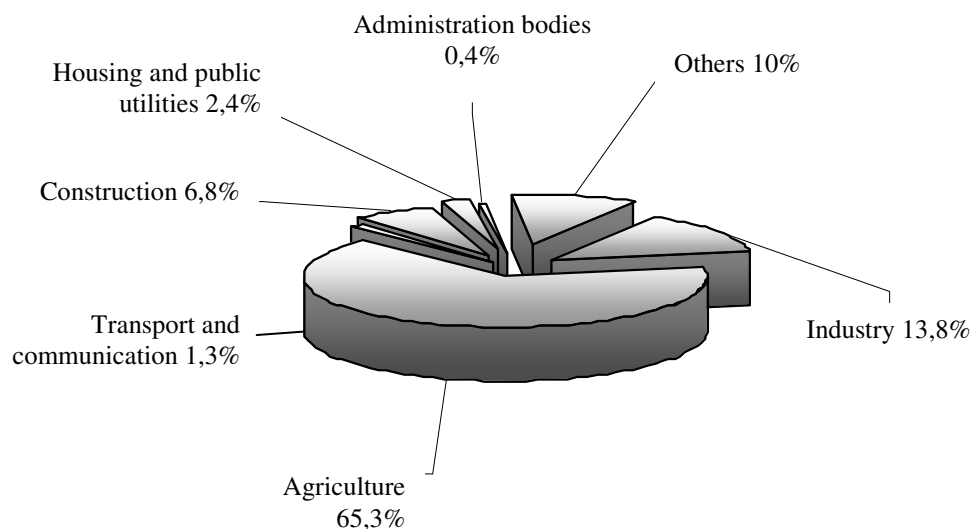
In March 2008, the lowest wages and salaries in real sector were observed in forestry and agriculture, amounting to 52,43 somoni and 61,96 somoni, respectively. The highest wages and salaries were observed in construction (544,42 somoni), communication (520,51 somoni), transport (470,57 somoni), and industry (364,24 somoni). Average monthly salary in real sector in March 2008 was 212,29 somoni, increasing by 42,1% as compared to March 2007.

In non-production sphere, the highest salary remains in the area of finance and crediting (971,79 somoni in March 2008). Average monthly salary in non-production sphere in March 2008 was 195,39 somoni, increasing by 33,5% as compared to March 2007.

As of the end of March 2008, total arrears in salary payments for the republic (inclusive of arrears for previous years) amounted to 21598,4 thsd.somoni, of which arrears for March 2008 accounted for 9,2% (1985,4 thsd.somoni).

The highest arrears in salary payments are observed in real sectors: 13986,6 thsd.somoni (64,8% of total arrears) in agriculture, 2974,9 thsd.somoni (13,8%) in industry, and 1461,4 thsd.somoni (6,8%) in construction.

Graph 2: Structure of arrears in salary payments by sectors of economy (in %, as of the end of March 2008, inclusive of arrears for previous years)



CHAPTER II. AVAILABILITY OF FOOD

Availability refers to the physical presence of food as a result of domestic production or market operations. On country level availability of food is determined by combination of food stocks, commercial imports, food aid and domestic production. The availability is also determined by the following elements: weather conditions, crop yield, livestock and productivity, producer prices for food, food prices in neighboring countries, as well as national policy defining production, trade, distribution and pricing.

2.1. Growth in agricultural production

The value of gross agricultural output in January-March 2008 in all categories of farms increased by 6.6% as compared to the corresponding period of the previous year and amounted to 297,2 mln.somoni (at current prices), of which: animal products – 296,0 mln.somoni (increased by 6,7%), and plant products – 1,2 mln.somoni (decreased by 1,2%).

The value of gross agricultural output in all categories of farms in Soghd oblast amounted to 118,8 mln.somoni (increased by 6,6%), Khatlon oblast – 112,2 mln.somoni (by 7,1%), GBAO – 10,2 mln.somoni (increased by 10,4%), and regions of the republican subordination – 56,0 mln.somoni (by 5,2%).

2.1.1. Outlook for agricultural production

Climate influence on crop production

January. In Central Asia the average air temperature fluctuated between 15-20 and 21-26 degrees below zero with snowfalls. Such cold event was unusual phenomena. As a result of shift of cold air from north and warm air from south, cyclone was observed in the Central Asia and Tajikistan, which caused long-continued frosts.

Precipitations were frequent. Snowfalls were observed in all regions of the republic. Total amount of precipitations in Khatlon oblast was 21-61 mm (against the norm of 29-49 mm) with snow cover depth of 5-10 sm; in Soghd oblast – 3-29 mm (against 5-16 mm) with snow cover depth of 3-24 sm; in RRS – 21-15 mm (against 32-37 mm) with snow cover depth of 10-50 sm; in the southern part of Gissar slope – 100 mm (against 20-76 mm) with snow cover depth of 85-145 sm (exceeded the norm by 100%); in the eastern part of GBAO – 9-27 mm (against 4-36 mm) with snow cover depth of 7-28 sm; and in the eastern part of the oblast – 3-6 mm (against 2-6 m).

Decrease of water content in rivers of the republic was continued in January. Average monthly water discharge of the most rivers was within and below the norm (62-116%) as compared to January of the previous year.

February. During half of the month, low temperature was observed with day-time temperature decreased by 10-12 degrees below the norm: in valleys day-time air temperature didn't exceed 2-7 degrees. During some day air temperature fell to 1-6 degrees below zero. Total monthly amount of precipitations was within and above the norm, as follows: in valleys and foothills of Soghd oblast - 19-54 mm (against the norm of 15-40mm); in Khatlon oblast – 30-83 mm (against 45-15 mm), RRS – 57-114 mm (against 15-40 mm), in the western part of GBAO – 3-65 mm (against 45-115 mm), and in the eastern part of GBAO – 2-6 mm (against 5-15 mm). Starting from the second decade of February, increase of water content in rivers of southern slope of Gissar range was observed. In the third decade of the month, water content of the rivers exceeded the norm by 10%.

March was warm. Average monthly air temperature throughout the republic exceeded the norm by 3-7 degrees. Daily air temperature was 13-17 degrees in valleys, 2-6 degrees in mountains, and 4-6 degrees below zero in high mountain areas.

Precipitations were registered during 3-6 days (against the norm of 9-16 days); in mountain regions – 6-11 days (against the norm of 15-20 days). Monthly amount of precipitations in the most regions of the republic was below the norm (6-50%). As a result of snow dissolution in **March**, decrease of water discharge in the mountainous rivers was observed. Average monthly water discharge of the most rivers was within and above the norm (90-150%).

Table 2: Water reservoirs as of 31 March 2008

<i>Water reservoirs</i>	<i>Changes during the month, mln. cubic meters</i>	<i>Volume of water in 2007</i>		<i>Volume of water in 2008</i>	
		<i>mln. cubic meters</i>	<i>in % to total capacity</i>	<i>mln. cubic meters</i>	<i>in % to total capacity</i>
Kayrakkum	- 0,027	3453	83,0	3478	83,6
Nurek	- 0,032	5988	57,0	5961	56,7

2.1.2. Crop production**Table 2: Sown area and gross harvest**

	2006	2007	<i>1 quarter</i>	
			2007	2008
Sown area (thsd.ha)	900,2	891,1	300,2	368,0
Winter crops	214,9	190,7	119,6	132,6
Cereal crops	214,9	190,7	119,6	132,6
Spring crops	685,3	700,4	145,8	177,7
Cereal crops	187,0	206,2	93,2	100,0
wheat	121,4	132,2	70,7	69,2
barley	31,7	36,6	18,9	26,8
Industrial crops	294,0	283,8	28,1	48,7
Potatoes	27,9	29,8	2,1	1,8
Vegetables	35,8	39,1	6,4	5,8
Melons	9,1	11,1	1,2	1,4
Gross harvest, thsd.tons				
Vegetables	759,2	828,6	0,6	0,6

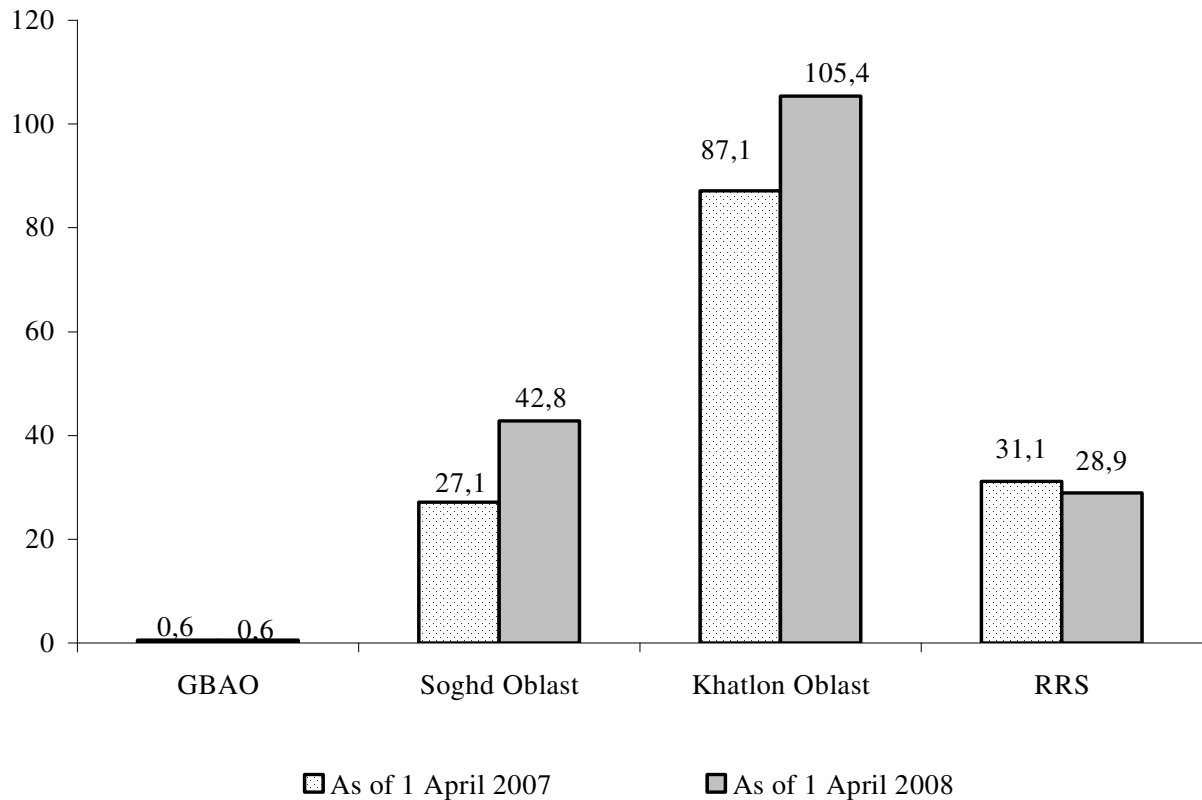
Source: State Committee on Statistics

As of 1 April 2008, the share of areas under cereals and leguminous cultures accounted for 63,2% of all sown areas, under technical cultures – 13,2%, of which under cotton – 9,1%, under feed crops – 12,1%, under potatoes, vegetables and melons – 2,4%.

Spring crops

As of 1 April of the current year, spring crops were sown on an area of 177,7 thousand ha, or 122% of the areas under spring crops at the corresponding time last year. Details on spring crops sowing by Oblasts are presented in Graph 3.

Graph 3: Area under spring crops (thsd.ha)



The area sown to potatoes amounted to 1,8 thsd.ha, which is less by 0.3 thsd.ha than at the corresponding time last year. Similarly, vegetables were sown on 5,8 thsd.ha that is higher by 0,6 thsd.ha than in the corresponding period of the last year.

**Table 3: Availability of seed for spring seeding works
as at the beginning of February 2008**

	<i>Availability of seeds, thsd.tons</i>	<i>In percent of the required amount</i>
Cereals and leguminous cultures (excluding maize)	35,2	84,2
of which:		
wheat	31,6	87,0
rice	0,2	100,0
Maize	0,3	100,0
Potatoes	13,0	180,5

Source: State Committee on Statistics

2.1.3. Livestock production

As of 1 April 2008, number of cattle in farms of all categories amounted to 1863,6 thas.heads (and increased by 5,7% as compared to the similar date of the previous year); sheep and goats – 3090,1 thas.heads (increased by 1,7%), poultry – 4176,0 thsd. (by 6,0%). About 91,8% of cattle and 79,5% of sheep and goats belong to population' farm businesses.

In January – March 2008, farms of all categories produced 17732 tons of meat or 109,4% as compared to the similar period of the previous year. Production of meat increased in farms of GBAO (by 11,4%), Khatlon oblast (by 10,3%), Soghd oblast (by 7,1), as well as Nurobad region (by 36,1%), Shahrinav region (by 15,5%), Gissar region (by 14,4%), Rasht region (by 12,2%), Rudaki region (by 7,2%), Tursunzade region (by 6,9%), Tadjikobad region (by 5,9%), and Djirgatal region (by 5,1%).

During the reporting period, total production of milk amounted to 108690 tons, increasing by 4,2% as compared to January-March 2007. Production of milk increased in farms of GBAO (by 7,7%), Khatlon oblast (by 7,8%), as well as Rudaki region (by 6,4%), Tajikabad region (by 4,2%), Tavildara region (by 3,9%), and Rogun town (by 2,9%). Population' farm businesses produced 91,6% of total volume of milk produced in the republic: 99.9% in GBAO, 91.9% in Soghd oblast, 91.0% in Khatlon oblast, and 91.4% in RRS.

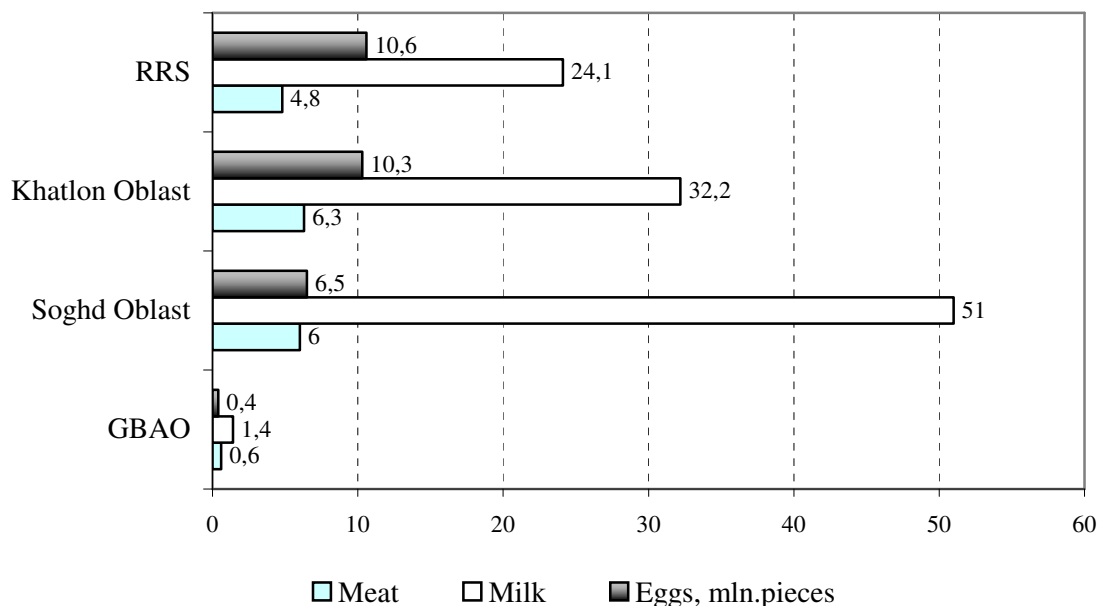
As of 1 April 2008, total production of eggs amounted to 27800 thsd.pieces, increasing by 4,5% as compared to January-March 2007. As compared to the similar period of the previous year, production of eggs increased in Khatlon oblast (by 12,5%), Nurobad region (by 26,7%), Tursunzade region (by 17,0%), Gissar region (by 15,2%), Vahdat region (by 7,5%), and Djirgatal region (by 5,3%).

As of 1 April 2008, the average milk yield per cow in agricultural enterprises and dehkan farms was 302 kg, decreasing by 15 kg as compared to the corresponding period of the previous year. During the reporting period, the average output of eggs from 1 laying hen was 25 pieces. In average 21 calves were received from every 100 female cows. As of 1 April 2008, in average 66 heads of lambs and goatlings were received from 100 female sheep and goats, decreasing by 7 heads as compared t the similar period of the previous year.

Table 4: Main indicators of livestock production in the Republic of Tajikistan

	2006	2007	1 quarter 2007	1 quarter 2008
Production, thsd.tons				
Meat (slaughtered)	55,9	59,5	16,2	17,7
of which:				
Beef and veal	25,3	26,9	7,3	8,0
Mutton and goats meat	27,6	29,4	8,0	8,7
Poultry	0,6	0,7	0,2	0,2
Other meat	2,4	2,5	0,7	0,8
Milk	544,9	583,6	104,3	108,7
Eggs, mln.	104,7	111,2	26,6	27,8
Productivity				
The average milk yield per cow, kg	1502	1387	317	302
The average output of eggs per laying hen, pieces	122	118	30	25

Graph 4. Production of main live-stock products in all categories of farms in the first quarter of 2008, thsd. tons



2.2. Producer prices

Table 5: Changes in producer prices

(*somoni / kg*)

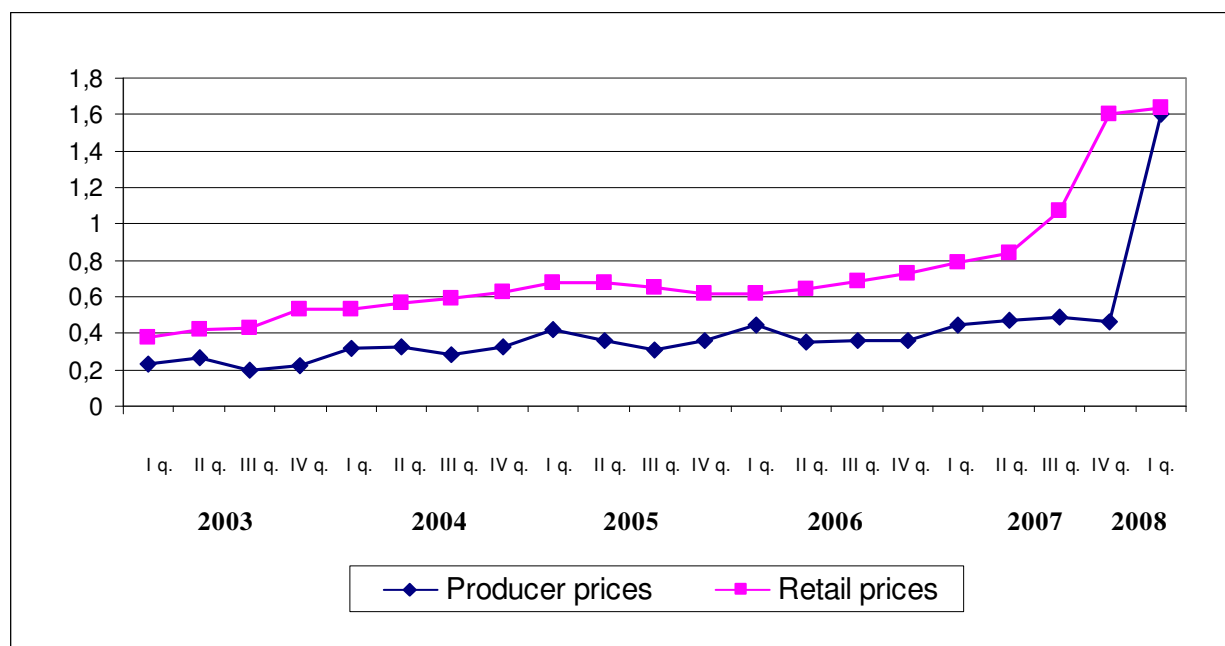
	2006				2007				2008
	<i>I q.</i>	<i>II q.</i>	<i>III q.</i>	<i>IV q.</i>	<i>I q.</i>	<i>II q.</i>	<i>III q.</i>	<i>IV q.</i>	<i>I q.</i>
Wheat	0,44	0,35	0,39	0,39	0,45	0,47	0,49	0,46	1,60
Milk	0,51	0,52	0,51	0,54	0,67	0,70	0,70	0,72	1,00
Potatoes	0,28	0,35	0,44	0,49	0,29	0,72	0,67	0,76	0,68

Source: State Committee on Statistics

In the first quarter of 2008 the imports of wheat decreased by 5,2% as compared to the first quarter of 2007.

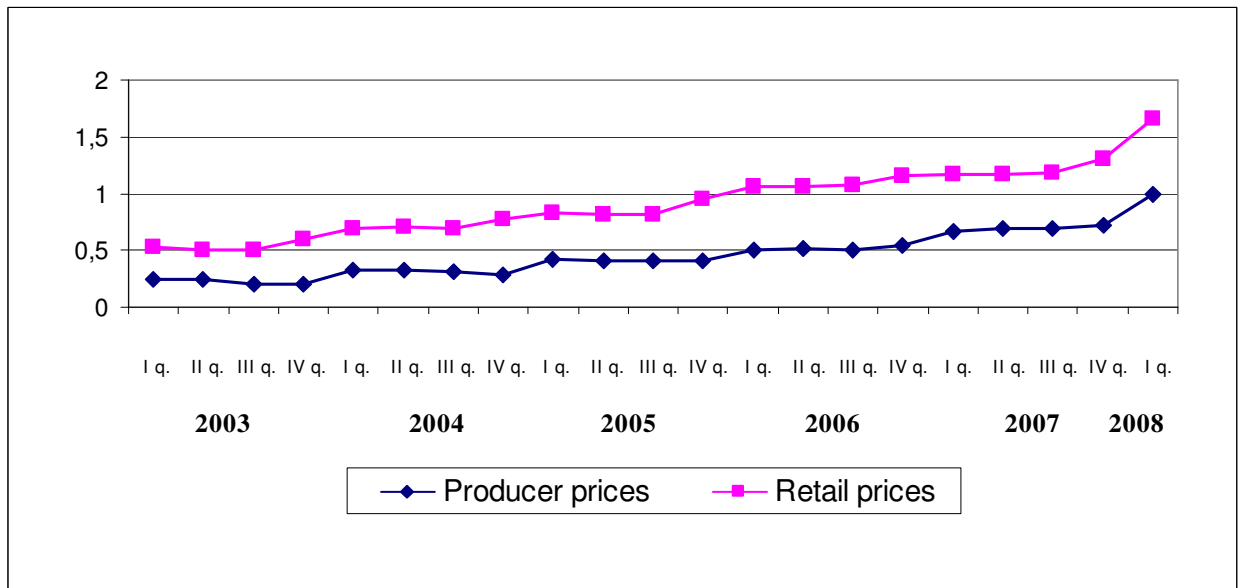
Graph 5. Trends in producer and retail prices of wheat

(*somoni/kg*)



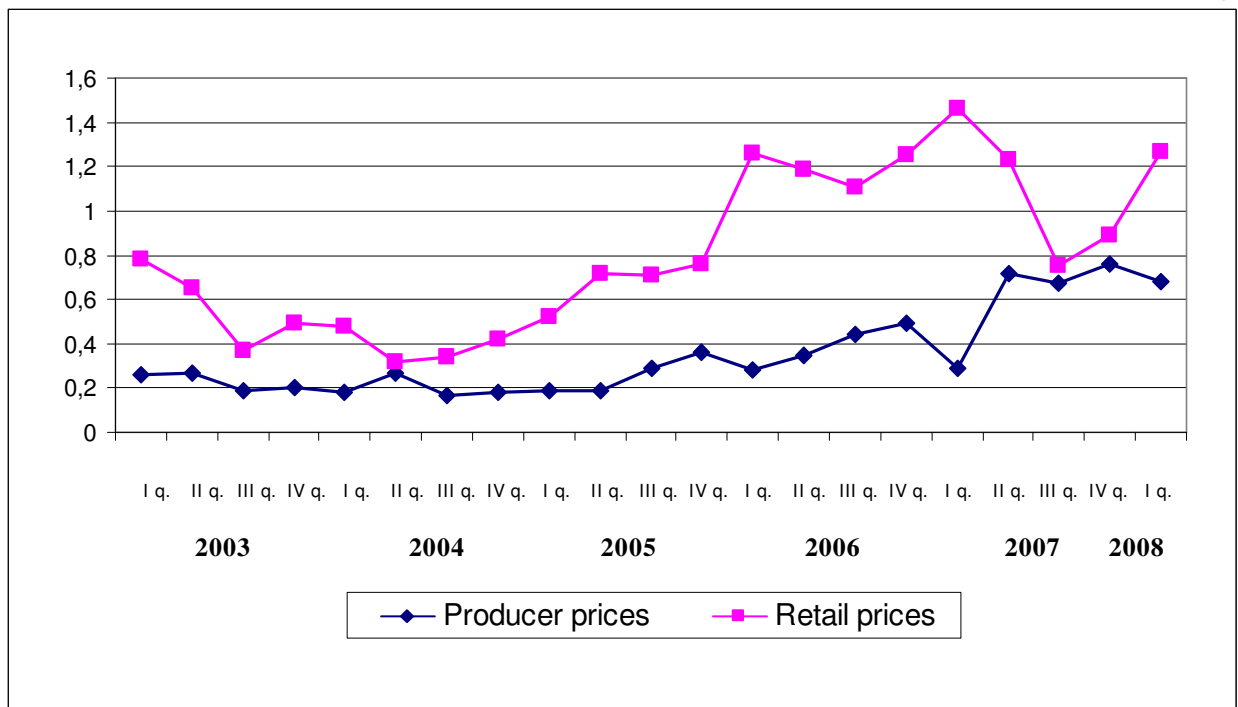
Graph 6. Trends in producer and retail prices of milk

(somon/kg)



Graph 7. Trends in producer and retail prices of potatoes

(somon/kg)



The given graphs show that change in retail prices is higher than in producer's ones. This trend is specific for all types of agricultural products (see Appendices 3 and 4).

2.3. Trade in basic foodstuffs

Share of food products in the total value of exports of Tajikistan accounted for 3,0% and 3.1% in the first quarters of 2007 and 2008, respectively. The share of food products in

total volume of imports was well higher and accounted for 12,2% and 14.8%, respectively.

The major food products imported to the Republic of Tajikistan were wheat and flour (the greatest share), as well as sugar, vegetable oil, fruits, flour products (macaroni, noodles, bread, cakes, pastries), eggs, tea and others.

Imports of food products in the first quarter of 2008 increased by 5% as compared to the first quarter of 2007. Imports of milk and dairy products increased by 56%, vegetable oil - by 70%. At the same time, imports of wheat decreased by 5,2% amounting to 83,8 thsd.tons (against 88,4 thsd.tons in the first quarter of 2007), and imports of flour decreased by 7,4% amounting to 130,6 thsd.tons (against 141,1 thsd.tons).

Table 6: Exports and Imports of basic food products

(thsd.tons)

	<i>Exports</i> <i>1st quarter</i>		<i>Imports</i> <i>1st quarter</i>	
	2007	2008	2007	2008
<i>Food products</i>	40,6	30,0	325,0	340,0
of which				
wheat	-	-	88,4	83,8
flour	-	-	141,1	130,6
sugar	-	-	28,2	27,6
spaghetti, noodles, elbow and other products	0,0	-	2,4	3,4
vegetable oil	-	-	13,8	23,5
milk and dairy products	-	-	0,9	1,4
eggs	-	0,1	1,0	1,7
tea	-	-	0,9	2,0
vegetables	10,0	4,8	0,1	0,1
fruits and berries	2,2	2,2	2,2	5,0
fruit and vegetable juices	3,2	2,1	0,4	0,4
canned vegetables, tomatoes	0,2	0,0	0,2	0,4
Share of food products in total volume, %	3,0	3,1	12,2	14,8

2.4. Availability of food per capita

The availability of food per capita is calculated using a food balance. A food balance shows for each basic food commodity, the total physical availability and utilization of that foodstuff over a given period of time, usually 1 year. **Total physical availability** is the sum of stocks at the beginning of the period, production and imports of that commodity in a given period of time. **Total utilization** covers use for human

consumption + use as animal seed + seed + losses + exports + stocks at the end of the period. In any one period, the availability and utilization of the same commodity must balance. Drawn up over a succession of years, food balances usually reveal a trend in total availability, imports, exports, and the availability of food for human consumption and for feed use. Dividing the annual amount of food available for human consumption by the population gives a key indicator of availability: the average availability of food per capita per year. This measure of food availability is a national average, which takes no account of households' access (i.e. ability to produce, purchase or otherwise obtain) to food.

Table 7: Consumption of foodstuff per capita

(kg / month)

	I quarter of 2007	I quarter of 2008
Bread products (expressed in grain)	12,7	12,7
Potatoes	2,3	2,6
Vegetables and melons	4,8	4,9
Fruits and berries	2,2	1,8
Sugar and confectionery items	0,9	0,9
Meat and meat products	0,7	0,8
Milk and dairy products	4,4	4,3
Eggs (pieces)	2	2
Vegetable oil	1,0	1,0
Fish and fish products	0,01	0,02

Source: Household budget survey

The analysis of food balances shows that food availability remains stable during last years.

More detailed information is available in Appendix 5 “Food balance”.

CHAPTER III. ACCESS TO FOOD

Access to food refers to the ability of households to obtain adequate safe and appropriate foods to meet their needs for a healthy and active life. Access can be through production for own consumption, market purchases or donations / transfers.

3.1. Consumer's prices

In March 2008 consumer's prices of most basic foodstuffs increased significantly as compared to December 2007, except of prices cotton oil, eggs and carrot (See Table 8, Appendix 4).

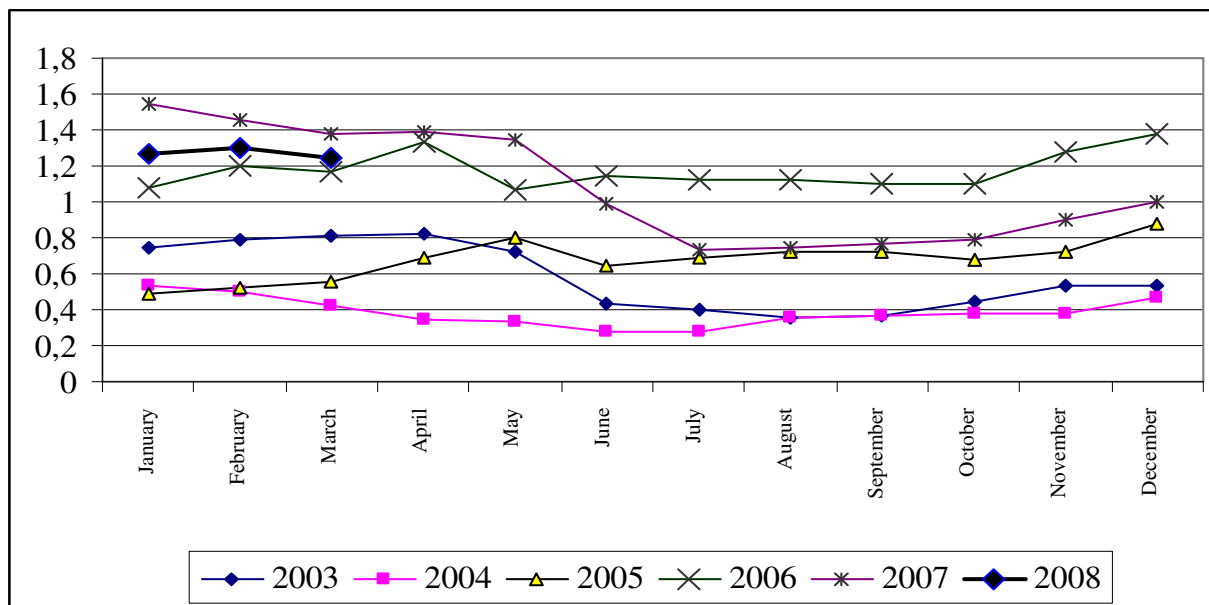
**Table 8: Average prices for some food products in consumer's sector
(average for Republic)**

	2008			2007	
	January	February	March	March	December
Beef	12,54	12,54	13,05	10,24	12,54
Animal oil	16,20	18,14	18,21	12,94	16,20
Cotton oil	7,38	7,28	6,93	3,26	7,38
Milk	1,51	1,67	1,67	1,15	1,51
Eggs (10 pieces)	5,44	5,24	5,00	4,12	5,97
Sand sugar	2,37	2,39	2,40	2,37	2,37
Salt	0,44	0,44	0,44	0,42	0,44
Light wheat flour	1,95	2,00	2,07	1,16	1,95
Bread made from light wheat flour	2,15	2,17	2,17	1,24	2,13
Rice	3,14	3,16	3,19	2,69	3,11
Potatoes	1,27	1,30	1,25	1,49	1,24
Onion	0,75	0,71	0,71	0,92	0,69
Carrot	0,90	0,78	0,64	0,76	0,84
Apples	2,72	3,23	3,23	1,70	2,72
Vodka	7,42	7,53	7,67	5,99	7,38

During 2008, the highest increase in prices was registered for cabbage (by 17,9%), milk (by 10,2%), semolina (by 8,7%), mutton (by 8,5%), sour cream (by 7,0%), pea (by 6,6%), cookie (by 6,1%), pasta (by 6,0%), light wheat flour (by 5,8%), chocolate sweets (by 4,2%), beef (by 4,1%), vodka (by 3,9%), fruit and vegetable juice (by 3,5%), rice (by 2,4%), tea (by 2,1%), sand sugar (by 1,6%).

At the same time, the highest decrease in prices was registered for carrot (by 23,3%), eggs (by 16,2%), and cotton oil (by 6,1%).

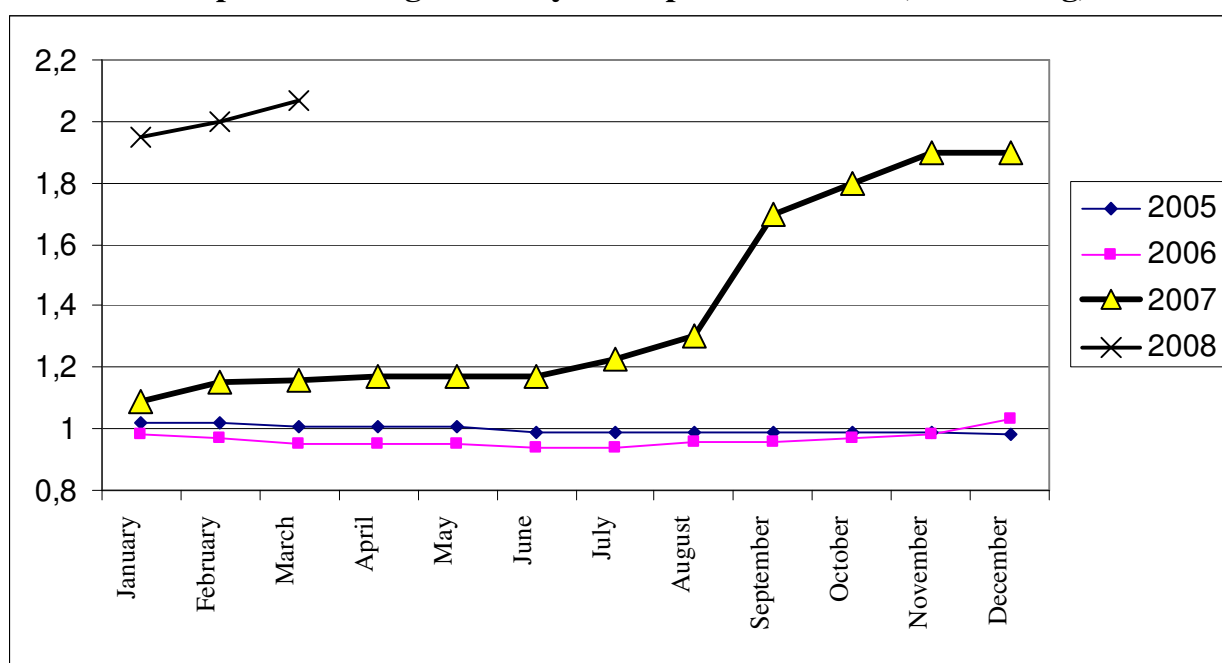
Graphs 8: Average monthly retail prices for potatoes (somon / kg)



Potatoes. Retail prices of potatoes are subject to seasonal fluctuations and also to fluctuations in supply and demand. The highest seasonal price is normally recorded in the second quarter of each year, prior to the first new harvest. In the first quarter of 2007 prices for potato decreased as compared to December 2006 mainly due to import of potato. In the second and third quarters the prices of potato decreased again as compared to the first quarter due to new harvest (see Graph 8). In the fourth quarter of 2007, the prices increased by 18,7%. In the first quarter of 2008, average prices for potatoe were lower by 13% than in the first quarter of 2007, but higher by 27% than in December 2007.

Flour. In the first quarter of 2007 prices of flour continued to increase and reached 1.16 somoni per kg by the end of March 2007. Total increase in prices of flour for three months was 9.2%. In the second quarter of 2007, the price of flour was 1.17 somoni per kg, while in the third quarter it reached 1.43 somoni. It should be noted that at the end of September 2007, the price of flour reached 1.7 somoni per kg increasing by 45.3% as compared to the end of June 2007 (see Graph 9). In the fourth quarter, a sharp rise of prices of flour was recorded, and at the end of December they reached 1.95 somoni per kg (increasing by 14,7% as compared to September 2007). In the first quarter of 2008, average prices of flour reached 2 somoni, increasing by 5,3% as compared to December 2007.

Graphs 9: Average monthly retail prices for flour (somoni / kg)



Beef. In March 2007, the prices of beef reached 10.24 somoni per kg, increasing by 3.1% as compared to December 2006; and in June the prices reached 11.32 somoni per kg. In September 2007 the prices of beef continued to increase and reached 12.18 somoni per kg

by the end of the month. By the end of December 2007 the prices increased up to 12.39 somoni per kg. In the first quarter of 2008, average price for beef was recorded at 12,83 somoni per kg, increasing by 3,1% as compared to December 2007.

Cotton oil. In March 2007, average price of cotton oil was 3.26 somoni per a liter, while in June it increased by 17.2% reaching 3.82 somoni per a liter. By the end of September the prices of cotton oil reached 4.6 somoni per a liter. In the fourth quarter, a sharp rise of prices of cotton oil was recorded, and by the end of December they reached 5.83 somoni per a liter (increasing by 26.7% as compared to September 2007). In the first quarter of 2008, average price of cotton oil was 7,23 somoni per a liter, increasing by 11,2% as compared to December 2007.

3.2. Incomes and expenditures

The source of information on household incomes and expenditures is the Household Budget Survey which is conducted on the basis of a monthly survey of 925 households and is comprised of the following: demographic information on the composition of the family, housing and infrastructure, volume of consumption in the family including domestically manufactured items, economic activity in both agricultural and non-agricultural sectors.

3.2.1. Incomes

In 2007 per capita cash income increased by 38.6% as compared to 2006, and amounted to 85.12 somoni. In the first quarter of 2008 per capita cash income amounted to 102,24 somoni, increasing by 25,1% as compared to the first quarter of 2007 (See Table 9).

Table 9: Trends in population incomes and expenditures

	1 st quarter of 2007	1 st quarter of 2008
Average per capita incomes (somoni / month)	64,76	102,24
Growth in real incomes (%)	117,5	125,1
Average monthly salary	146,52	209,45
Growth in real salary (%)	125,6	113,3
Average per capita expenditures (somoni / month)	67,85	105,20
Growth in real expenditures (%)	121,7	122,9

Source: Household Budget Survey and current statistical data

The most important sources of cash incomes of households in the first quarter of 2008 continued to remain labor incomes – 50,6% and receipts from sales of agricultural products – 13,6%. In the first quarter of 2008, the gap between the average incomes of the highest and the lowest deciles amounted to 15,5 times.

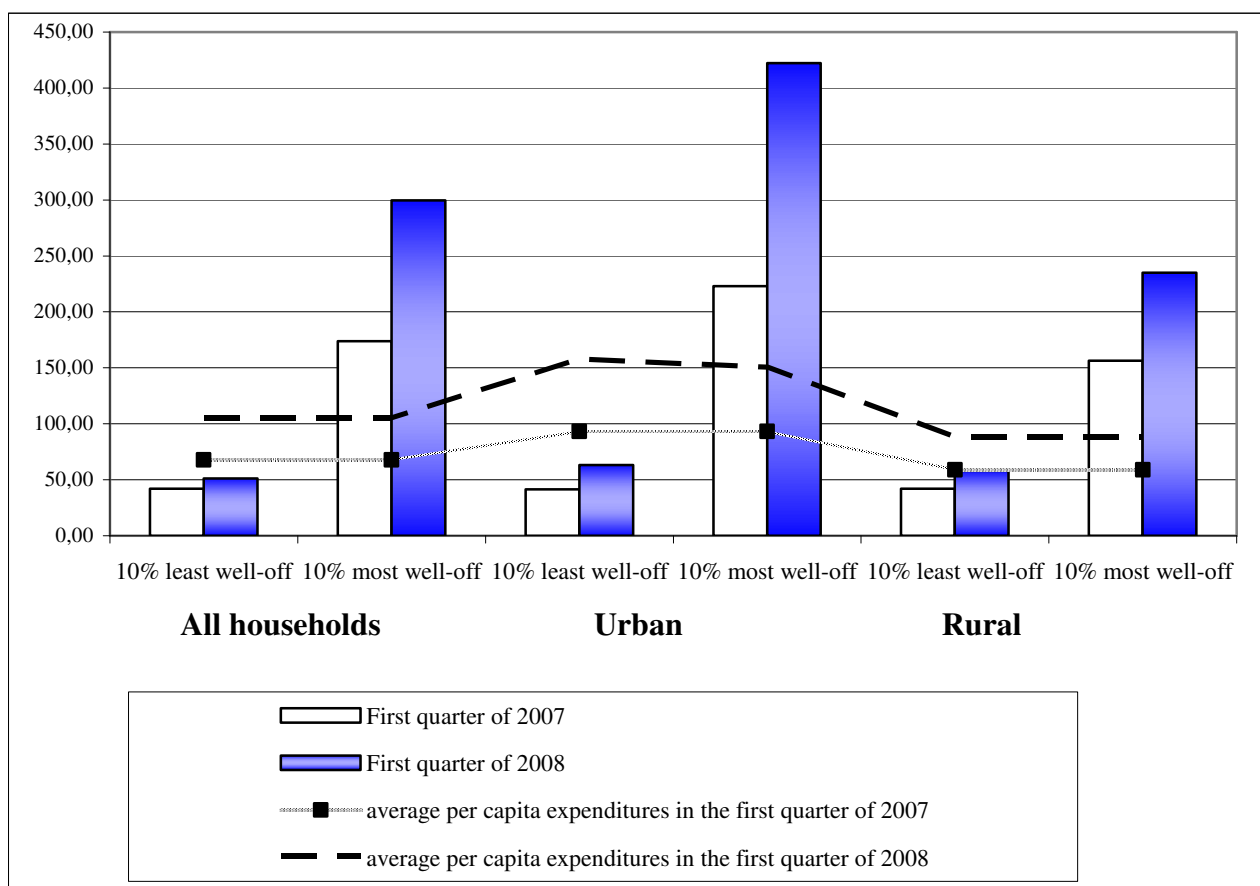
As of the end of March 2008, total arrears in salary payments for the republic (inclusive of arrears for previous years) amounted to 21598,4 thsd.somoni, of which arrears for March 2008 accounted for 9,2% (1985,4 thsd.somoni).

3.2.2. Expenditures

In the first quarters of 2007 and 2008, average expenditures of population have risen mainly due to increase in prices (see Appendix 8 and Graph 10).

In the reporting period of 2008 the gap between expenditures of the highest and the lowest deciles was 5.9 times.

Graph 10: Growth of per capita expenditures by decile groups in the first quarters of 2007 and 2008



3.3. Poverty in the Republic of Tajikistan

Poverty and food & nutrition insecurity are closely related and form a vicious circle. Food and nutrition insecurity is defined as “When people lack secure access to sufficient amounts of safe and nutritious food for normal growth and development and an active and healthy life. It may be caused by the unavailability of food, insufficient purchasing power, inappropriate distribution, or inadequate use of food at the household level. Food insecurity, poor conditions of health and sanitation, and inappropriate care and feeding practice are the major causes of poor nutritional status. Food insecurity may be chronic (persistent), seasonal or transitory.

3.3.1 Poverty Reduction Strategy of the Republic of Tajikistan for 2007-2009 (PRS)

The Poverty Reduction Strategy of the Republic of Tajikistan for 2007-2009 (PRS), is intended to serve as a medium-range socio-economic development programme for the country. Taking into account available resources and additional needs, it outlines concrete actions to implement institutional and economic reforms that will promote strong and sustainable economic growth and an improvement in the scope and quality of social services aimed at easing the burden of poverty in the country.

Indicators of Poverty Reduction Strategy of the Republic of Tajikistan are given in Appendix 2.

3.4. Food insecurity: households spending more than 50% of expenditures on food

Food insecurity means a situation when people have no regular physical, economic or social access to adequate quantities of qualitative and safe food required for their nutrition, which meets their preferences for an active and healthy life.

Share of expenditures for food in the structure of total household's expenditures in 2007 increased from 59.0% to 61.8% in urban area, and decreased from 60.0% to 56.3% in rural area. However, share of expenditures for food among vulnerable groups of population increased up to 70.7% . In the first quarter of 2008, share of expenditures for food in urban area decreased by 1,5% as compared to the first quarter of 2007, while in rural area it increased by 0,5%. Share of expenditures for food among vulnerable groups of population increased up to 3% (see Table 10).

**Table 10: Share of consumer expenditures for food
in total structure of household expenditures, in per cent**

	1st quarter of 2007	1st quarter of 2008
Republic of Tajikistan	58,1	58,0
Urban	62,9	61,4
Rural	55,3	55,8
Oblasts		
Dushanbe	62,5	64,4
GBAO		
Soghd oblast	50,0	45,3
Khatlon oblast	62,7	70,0
RRS	60,9	60,8
Vulnerable groups of population		
Households having 3 and more children	58,7	62,4
Pensioners	70,3	71,6

More detailed information on expenditures, incomes and deciles is available in Appendix 6.

CHAPTER IV. USE AND UTILIZATION

Use of food refers to the selection, composition, preparation and allocation of food within the family. Utilization of food refers to the ability of the human body to take and use food within the body. Food use covers knowledge of appropriate diets, and proper allocation of food. The ability of the body to utilize food is affected by its state of health and access to clean drinking water, access to basic health services, etc. The ultimate measure of food security is the nutritional status of the population.

4.1. Consumption of food products by the population

One of the measurements of food and nutritional insecurity is the calculation of daily calorie intake per one household member. In 2007 the average daily calorie intake decreased to 2057.61 Kcal per capita, which is slightly below the recommendations of the World Health Organization (WHO) (2100 Kcal per a day). In the first quarter of 2008, the average daily calorie intake was 2061 Kcal per capita.

In the first quarter of 2008, in all regions of Tajikistan consumption of bread and bread products exceeded approved medical norm by 16,9% and amounted on average to 38 kg per one household member.

In the first quarter of 2008, average consumption of potatoes in Tajikistan amounted to 7,7 kg per capita, vegetables and melons – 14,8 kg, milk and dairy products – 13 kg, meat

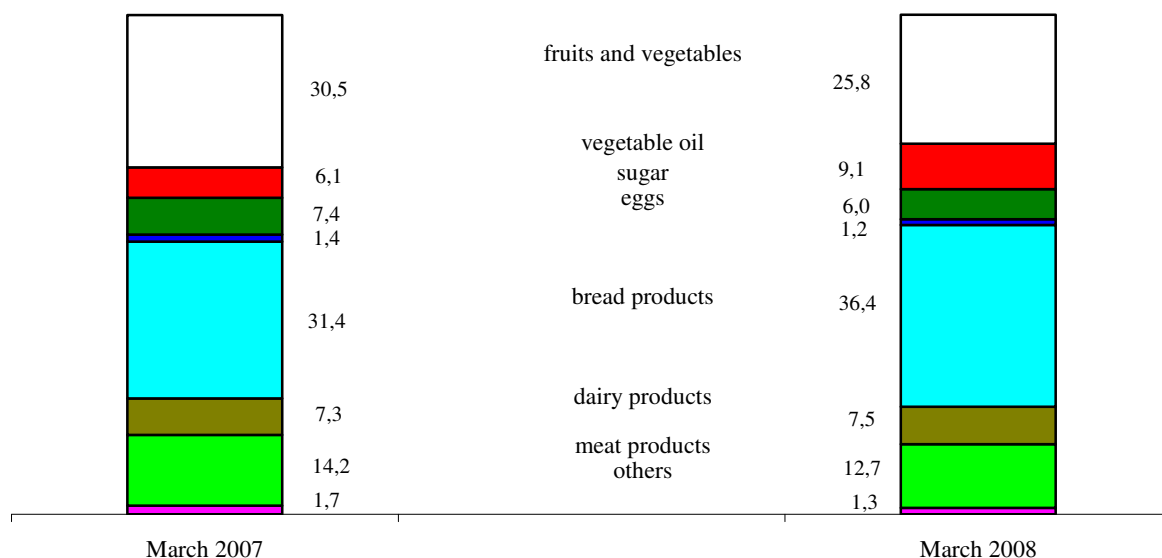
and meat products – 2,4 kg, vegetable oil – 3 kg, eggs - 6 pieces, sugar and confectionery – 2,8 kg, and fruits – 5,4 kg.

In total structure of household's expenditures for food, bread and bread products occupies the first place (34.9%).

It should be noted that consumption of food products varies by decile groups of the population. Thus, during the first quarter of 2008 average per capita consumption of potatoes in 10% most well-off population group exceeded that in 10% least well-of population group by 70%, meat and meat products – by 6 times, eggs – 3 times, fruits – by 2.4 times.

The cost of *consumer's basket*, at actual consumption (according to household survey 2006) amounted to 82,92 somoni per one household member in prices of end of March 2008, while the cost of food basket according to rational nutritional standard would amount to 156,53 somoni.

**Graph 11: Structure of consumer's basket in March 2007-2008
(as of the end of the month, in %, per one household member)**



Appendix 9 shows the detailed information on per capita food consumption in the households of the Republic of Tajikistan.

Table 11: Nutritional values of foods consumed per a day (excluding beer and wine)

	<i>Per one household member per a day</i>	<i>of which:</i>		<i>Per one household member per a day</i>	<i>B of which:</i>	
		<i>urban area</i>	<i>rural area</i>		<i>urban area</i>	<i>rural area</i>
	I quarter of 2007			I quarter of 2008		
Proteins, gr.	47,46	39,80	50,19	46,82	42,68	48,33
of which animal, gr.	6,44	6,52	6,42	6,51	7,47	6,16
Fats, gr.	46,97	49,39	46,09	46,60	49,54	45,51
of which animal, gr.	7,85	9,87	7,12	8,18	10,82	7,21
Carbohydrate, gr.	356,82	295,63	378,56	355,11	313,26	370,40
Caloric value of consumed food, k/calories	2074,78	1853,22	2153,24	2061,10	1941,00	2104,76
of which animal, gr.	113,94	125,75	109,69	118,10	140,84	109,72

4.2. Food security indicators not related to income

4.2.1 Population morbidity

Table 12. Population morbidity caused by some specific infection diseases (cases)

	2006	2007	1 quarter 2007	1 quarter 2008
Total number of registered cases	90650	89893	9616	8865
Acute enteric infections	67171	61307	3043	2633
of which:				
Bacterial dysentery	1735	2078	192	186
Typhoid fever	1419	1226	240	78
Tuberculosis	4043	4634	962	949
Brucellosis	1476	991	132	105

In the first quarter of 2008 incidence of infection diseases among population decreased by 7,8% as compared to the first quarter 2007. Cases of acute enteric infections account for 29,7% of total number of infection diseases. As compared to the similar period of the previous year, number of cases of acute enteric infections decreased by 13,5%, of which cases of typhoid fever – by 67,5%, and bacterial dysentery - by 3,1%.

During the reporting period, decrease in number of registered cases of tuberculosis by 1,4% as compared to the first quarter of 2007 was observed. Number of cases of brucellosis decreased by 20,5%

Table 13. Morbidity of children (0-14 years) by some specific infection diseases*(cases)*

	2006	2007	1 quarter 2007	1 quarter 2008
Total number of registered cases	69357	67833	6450	5721
Acute enteric infections	56485	50317	2325	1838
of which:				
Bacterial dysentery	731	794	58	51
Typhoid fever	535	509	123	35
Tuberculosis	275	344	60	63
Brucellosis	191	172	17	25

In the first quarter of 2008 incidence of infection diseases among children aged 0-14 decreased by 11,3% as compared to the first quarter of 2007. Cases of acute enteric infections account for more than 32% of total number of infection diseases. As compared to the similar period of the previous year, number of cases of acute enteric infections decreased by 21%, of which cases of bacterial dysentery - by 12%, and cases of typhoid fever - by 71,5%.

During the reporting period, increase in number of cases of tuberculosis among children of 0-14 years old by 5% as compared to the first quarter of 2007 was observed. Number of cases of brucellosis increased by 47%.

Table 14: Nutritional status indicators

	<i>Total number of persons on the dispensary books</i>			<i>of which cases revealed for the first time (new cases)</i>		
	2005	2006	2007*	2005	2006	2007*
Number of children of 0-14 years old suffering from malnutrition	5836	4655	4495	7363	7737	7494
per 100 000 children of this age group	224,5	180,9	174,7	283,2	301,1	291,3
Population suffered from endemic goitre, total	114500	94612	122587	109500	91745	67643
per 100 000 population	1654,6	1336,4	1698,9	1598,5	1310,6	947,4
of which children below 14 years old	54553	42193	57196	53166	39377	29802
per 100 000 children of this	2098,2	1640,0	223,1	2044,8	1532,2	1158,3

	<i>Total number of persons on the dispensary books</i>			<i>of which cases revealed for the first time (new cases)</i>		
	<i>2005</i>	<i>2006</i>	<i>2007*</i>	<i>2005</i>	<i>2006</i>	<i>2007*</i>
age group						
Population suffered from anemia, total	82776	82693	86882	105076	108690	84074
per 100 000 population	1196,2	1168,0	1204,1	1533,9	1552,7	1177,5
of which children below 14 years old	23720	21052	24573	25443	22846	24506
per 100 000 children of this age group	912,3	818,2	955,1	978,6	889,0	952,5

*) estimate

Source: Ministry of Health Care of the Republic of Tajikistan

Number of newly discovered cases of malnutrition among children of 0-14 years slightly decreased and estimated at 291,3 cases per 100 thsd.children (against 301,1 cases per 100 thsd.children in 2006).

Among all population applied to medical centers, endemic goitre accounts for 68,9% in total number of cases of endocrine system, dyspepsia and metabolic diseases. Decrease in number of cases of endemic goiter is observed for some time past.

There is no stable trend for decrease in number of anemia cases. While number of anemia cases among population decreased by 23% in 2007 as compared to 2006, number of anemia cases among children aged 0-14 increased by 7,3%.

4.2.2 Immunization

The immunization of children in all regions of the Republic is very important measure for prevention of infectious diseases.

Table 15. Percentage of children below 1 year immunized against vaccine-controlled diseases in the Republic of Tajikistan

	<i>BCG</i>		<i>General Polio-3</i>		<i>DPT3</i>		<i>Measles-1</i>		<i>Hepatitis B-3</i>	
	<i>2006</i>	<i>2007</i>	<i>2006</i>	<i>2007</i>	<i>2006</i>	<i>2007</i>	<i>2006</i>	<i>2007</i>	<i>2006</i>	<i>2007</i>
Total in republic	95,9	97,2	94,8	94,8	96,1	95,3	97,6	95,2	94,2	93,7

Source: Ministry of Healthcare of the Republic of Tajikistan

It is sad to note that due to high cost of rubella vaccine, it is not being procured which leads to periodical increase in cases of rubella. Thus, in the first quarter of 2008 number of cases of rubella amounted to 623 against 247 cases in the first quarter of 2007 (increasing by 2,5 times).

In the first quarter of 2008, cases of acute hepatitis accounted for 24,6% of total number of cases of infection diseases. As compared to the similar period of 2007, number of cases of acute hepatitis decreased by 21,5%.

4.2.3 Breastfeeding of children

The implementation of *Breastfeeding Program* is being continued to ensure exclusive breastfeeding of new-born children and decrease their morbidity and mortality.

Table 16. Breastfeeding of children during first year of life

	2004	2005	2006	2007
Number of children exclusively breastfed during:				
0-4 months	123488	126338	123477	129461
as percentage of the total number of children aged 1 year in the reporting period	87,9	87,1	84,8	86,6
0-7 months	102791	94522	100416	95542
as percentage of the total number of children aged 1 year in the reporting period	72,3	65,1	69,0	63,9

Source: Ministry of Health Care of the Republic of Tajikistan

4.2.4 Social Protection in the Republic of Tajikistan

Table 17: Social benefits by types

somoni

<i>Types of social benefits</i>	2005	2006	2007
Children-invalids ¹	12,00	20,00	20,00
Invalids from childhood ²	11,89	18,87	27,68
of which:			
of 1 st group	13,01	18,86	29,68
of 2 nd group	11,63	18,21	30,84

<i>Types of social benefits</i>	2005	2006	2007
Invalids due to industrial injuries or occupational disease	55,74	89,85	63,86
of 1 st group	55,12	71,77	73,64
of 2 nd group	61,92	113,19	67,28
of 3 rd group	44,11	55,20	63,00
Invalids due to general disease	39,00	57,50	61,00
of 1 st group	35,14	59,42	63,89
of 2 nd group	40,83	58,55	61,36
of 3 rd group	31,78	51,73	58,08
Elderly citizens (old-age pension)	25,02	39,57	41,08
Elderly citizens in high-mountainous regions ³	53,95	86,38	91,36
Women born 5 and more children and Mothers - invalids from childhood	19,01	33,30	33,95
Children in case of loss of bread-winner	15,94	23,30	26,50
Orphans ⁴	25,16	43,20	56,22

Source: Ministry of labour and social protection of population

- 1) Minimum size of disability benefits
- 2) Average size of monthly social benefits
- 3) Persons who worked and lives permanently in Murgab region of GBAO
- 4) Receiving survivor's pensions

As of 1 January 2008, 71229 persons received monthly social benefits, of them 33952 persons (47,7%) were disabled persons. The size of social benefit is liken to minimum old age pension. The average size of social benefit in 2007 was 25,87 somoni.

**Table 18. Number of disabled persons registered in social protection bodies
(at the end of each year, persons)**

	2003	2004	2005	2006	2007
Number of disabled persons receiving disability pensions as well as social pensions and benefits, total	118501	118928	125727	130850	124226
per 1000 population	18,0	17,6	18,2	18,5	17,2
<i>including:</i>					
Number of disabled children below 16, receiving social pensions, total	17693	16444	16963	19101	15319*
per 10000 children	60,2	59,6	60,6	63,0	46,8

*) disabled children below 18, estimate