

Tajikistan Monthly Risk Monitoring & Warning Report

September 2009



FAST FACTS FOR SEPTEMBER 2009

- **Post disaster shelter issues:** Over 2,000 persons in Khuroson district still need access to proper housing before the arrival of winter.
- **Early Freeze in Rasht Valley:** 27 hectares of potatoes were frozen adversely affecting 57 households in Hazor Chashma district of Rash Valley.
- **Mudflow in Rasht Valley:** Flooding in Shohindara village of Rasht Valley adversely affects 35 households, killing 150 livestock, destroying 9km of roads and 3 bridges, damaging 11 electric poles leaving around 350 households without electricity.
- **Remittance** to Tajikistan over the 8 months of 2009 dropped by 35.5% compared to the same period of 2008; In year-on-year terms in August 2009 remittances dropped by 36.6% compared to August 2008.
- **Food insecurity:** in September 2009 around 1.4 million people were identified as food insecure, 390,000 of them severely.
- **Outbreak of Small Ruminant Plague:** 10,000 cases of a highly infectious viral disease of small ruminants (sheep, goats, etc.) have been reported in Khatlon and DRD regions. Tajik Ministry of Agriculture requests FOR assistance and supply OF vaccines against PPR.

The aim of the Tajikistan Monthly Risk Monitoring Reports is to provide regular information and succinct analysis on the evolution of natural, economic, food-related, energy-related etc. risk factors in Tajikistan.

Data and information in this report have been provided by different sources and compiled by the UN Agencies in Tajikistan.

The United Nations in Tajikistan are not responsible for the quality of the data provided by external sources.

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¹ Information was provided by office of Mercy Corp in Tajikistan

I. NATURAL DISASTERS

1.1 Post Disaster Shelter Issues

As reported in previous editions of this report, in April and May 2009, Khuroson district in the south of Tajikistan suffered from mudflows that caused damages to shelter, roads, bridges and other infrastructure.

Over 2,000 people (over 300 families) need access to proper housing before winter. Supplies of essential medicines and school materials need to be replenished. Some 20,000 people still need access to drinking water, and 3,100 children are waiting to go back to school.

1.2 Mudflow in Shohindara village of Rasht Valley

On 22 September 2009, torrential rain caused flooding in Shohindara village of Rasht Valley. As the local Committee of Emergency Situations reports, total 35 households were adversely affected. Also, 9km of roads and 3 bridges were destroyed, 11 electricity lines with 3 km of electric poles and water supply pipe line were damaged leaving around 350 households without electricity and access to drinking water.

As for agriculture, the flooding washed away 8ha of planted fields, 150 privately owned livestock, and 456 bee boxes with over 3.5 thousand kg of honey.

For the reporting period, the urgent needs are fuel, drinking water and food commodities.

II. ENVIRONMENT AND WATER

2.1 Precipitation and Temperature²

August 2009 in Tajikistan was moderately hot with practically no precipitation. The average daytime temperature in most plain and hilly areas was around 33-36 °C. During 12-15 August, temperatures rose to 40-44 °C. In mountainous areas daytime temperatures ranged between 23-28 °C. Precipitation was scarce. The hydro-meteorological stations of Dushanbe, Kurgan-Tyube, Khujand and Khorog measured almost no precipitation in August 2009.

Weather Temperature and Precipitation during the first 20 days of September 2009

#	Stations	Temperature in °C						Precipitation	
		Air				Soil		Mm	% change from the norm
		Ave-ge	% change from multi year norm	max	min	min	max		
1	Dushanbe	20.9	2	36	7	5	61	0	0
2	Hisor	20	3	35	6	4	57	0	0
3	Rasht	19.1	0	30	6	-	-	2	100
5	Lakhsh	14.7	-1	27	1	-2	53	2	100
7	Farkhor	24.2	3	37	19	10	57	-	-
8	Danghara	25.3	4	37	9	9	65	-	-
10	Yavan	22.4	-2	37	14	12	45	-	-
11	Pyanj	23.7	2	37	10	5	51	-	-
12	Kurgan-Tyube	24.2	3	37	10	6	57	-	-

² Data and information from the Hydro-Meteorological Agency of the Republic of Tajikistan (Hydromet)

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13	Istaravshan	20	2	31	8	4	58	0.1	0
14	Panjekent	19.7	1	32	9	6	59	0.3	0
15	Buston	22	0	34	8	4	55	0.3	0
17	Dehvaz	11	0	20	2	-3	52	7	167
20	Shahriston	6.7	0	11	4	1	35	5	25
21	Ishkoshim	15.7	0	30	8	7	65	-90	-
22	Khorog	16.7	-2	28	5	1	59	-70	-
23	Murghab	7.1	0	17	-4	-16	47	-85	-
24	Navobod	13	-1	25	5	5	58	-	-
25	Khujand	22.7	3	34	10	8	51	0.1	-90

Average daily temperatures noticeably decreased towards mid-September, with a 5-6°C drop compared to the previous month. However, in general the weather remained warm, with around 20-25°C in the valleys and around 18-20°C in mountainous areas.

Toward the end of September and early October this year, temperatures may fall to 8-13°C in the valleys, while first frosts can be observed in mountainous areas (around 0 to 2°C in Khorog and Madrushkat).

For the past 25 years temperatures in September never fell below 11-13°C in the valleys and 7-9°C in the mountainous areas. The analysis of air conditions shows that early freezing conditions this September are caused by anticyclones moving toward Central Asia from western Russia and Siberia.

2.2 An Early Freeze in Rasht Valley, Tajikistan³

An early freeze hit the village of Hazor Chashma of Rash Valley, Tajikistan on the 10th of September. Harsh winds blowing down from the mountains literally froze the potato plants, finishing the growing season for the tubers. In total 27 hectares of potatoes were frozen. While the tubers are formed, they are mostly small in size and will not be useful as seeds for next year. All 57 households in Hazor Chashma were adversely affected.

Families generally store potatoes for consumption, sell, or use their potato harvest as seeds for the future. They eat generally 15% of their harvest, save 15-20% they save for seed, 10% may normally be lost, and the remaining 55-60% they sell. When harvests are good, approximately 20-25 MT of potatoes can be harvested from one hectare. Because the potatoes are now small in size, farmers expect to harvest only half of that weight in the next harvest season.

Preliminary reports coming from the district of Jergatol, Jamoat of Algha, where late planting occurred due to prolonged spring rains, 30 hectares of potatoes were also struck by the freeze. Information will continue to be collected in the coming week and provided in follow-up reports.

The early freeze in Rasht Valley mentioned above can be explained as follows: Precipitation between 1 and 5 September 2009 in Rasht valley, combined with arctic air moving towards Central Asia, caused a drastic decrease of temperature. During the night of 9 to 10 September, radiating frost also decreased ground temperature. The lowest air temperatures registered were 5.2°C in Dushanbe and Rasht valley, 0.8°C in Jirgatol, and 3.9°C in Tajikabad. However, general ground temperature fell to +2-4°C. The frost in the ground soil damaged some agricultural lands planted with potato and pepper. Such cases of frost are rare in September and even in the first half of October.

³ Information was provided by office of Mercy Corp in Tajikistan

2.3 River Water Levels

According to the Hydro-Meteorological Agency of the Republic of Tajikistan (Hydromet), during the first ten days of September 2009, water levels in Varzob, Isfara and Vakhsh rivers were below the norm by 3 to 23%. In all other river basins, the water level exceeded both the multi-year norm and the level observed during the same period of last year.

Water level in main river basins of Tajikistan in the first 20 days of September 2009							
#	Rivers	Basins	Average in cubic meters per second			% change compared to:	
			2009	2008	Norm	2008	Norm
1	Ghund	Khorog	89	99	49	-10	83
2	Vakhsh	Darband	510	445	660	15	-23
5	Varzob	Dahana	27	14	28	90	-3
6	Kofarnihon	Tartki	72	46	68	57	6
7	Obihingov	Tavildara	323	271	251	19	29
8	Isfara	Toshkurgon	17	13	20	30	-16
9	Sirdarya	Kizilkishlok	450	248	234	81	92

2.4 Perspectives for Environment and Water

El Niño⁴ is a periodic oscillation of the ocean-atmosphere system in the tropical Pacific which has important consequences for the weather in large parts of the world. Although the strongest effects on precipitation are felt in South-East Asia and the western Pacific Ocean, Central Asia is also affected by this phenomenon. According to statements of the National Oceanic and Atmospheric Administration (NOAA) in September 2009, El Niño is expected to strengthen.

Under El Niño conditions, parts of Central Asia tend to be wetter than average during September to November⁵. In general during warm El Niño episodes Central Asia could expect warmer and wetter winters (December to February) and dryer summers (June to August)⁶.

In its Climate Outlook for the Middle East for September 2009 – February 2010, the International Research Institute for Climate and Society (IRI) forecasts that Tajikistan and Kyrgyzstan will face an enhanced probability (> 38%) of above-norm precipitation levels for the period from September to December 2009.⁷ In terms of temperatures, IRI is expecting an increased probability for above normal temperatures in neighboring Afghanistan for September – November.

In such a scenario (wetter and warmer winter but dryer summer), increased precipitation would be positive for the planting season (winter wheat) and for hydropower generation. At the same time, one could expect less snow precipitation and, as a consequence, less water in the rivers in summer 2010. If followed by a drier spring and summer, this could create similar conditions as in spring 2008.

III. ENERGY

3.1 Water Volumes in Hydropower Reservoirs

Water volumes in the main hydropower reservoirs - Nurek and Kayrakum - remained well above the predicted figures. The CAREWIB website (Central Asia Regional

⁴ <http://www.elnino.noaa.gov/>

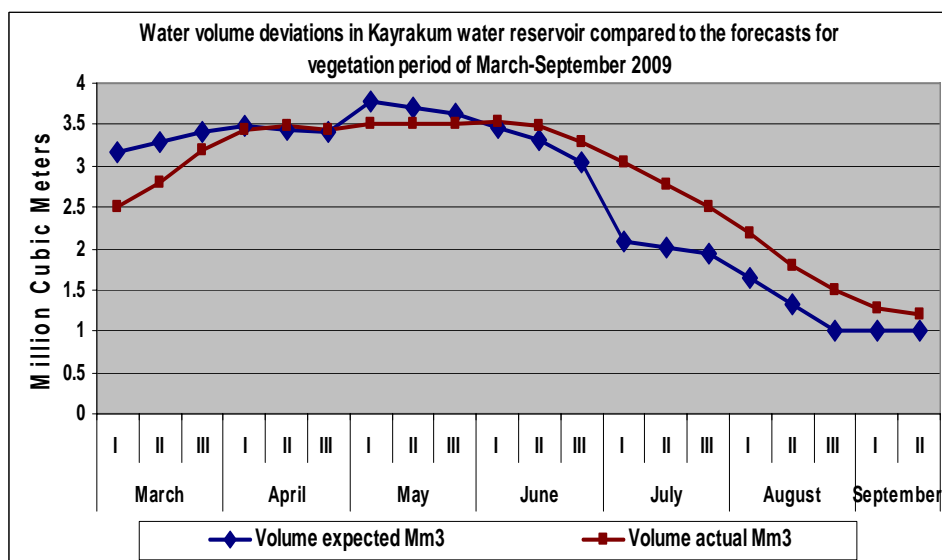
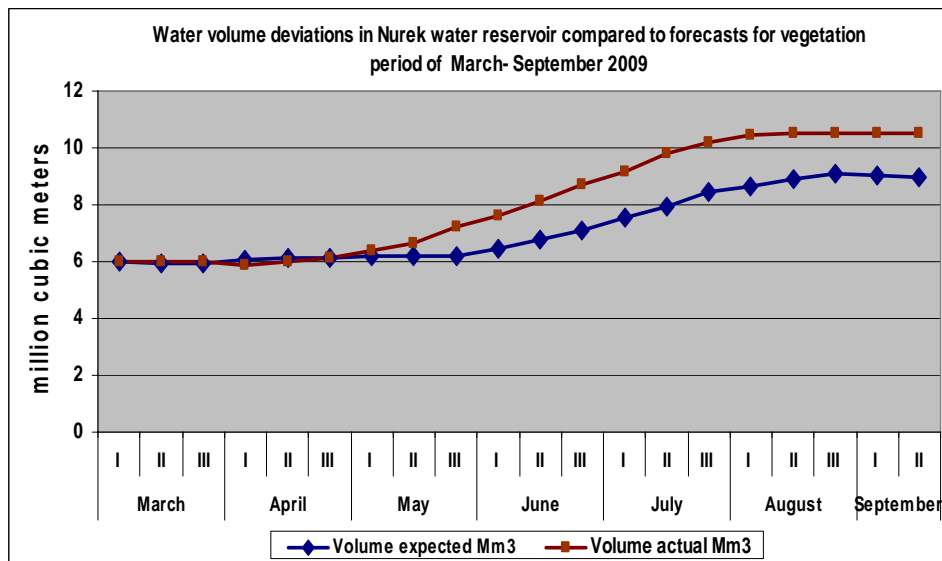
⁵ http://www.knmi.nl/research/global_climate/enso/effects/

⁶ Map showing global impacts of El Niño: <http://www.ncdc.noaa.gov/paleo/ctl/images/warm.gif>

⁷ http://iri.columbia.edu/climate/forecast/net_asmt/2009/aug2009/text/MEast.html

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Water Information Base, (http://www.cawater-info.net/index_e.htm) indicates that, for the first 20 days of September 2009, water volumes exceeded the norm by 17.3% in Nurek and 19% in Kayrakum reservoir.



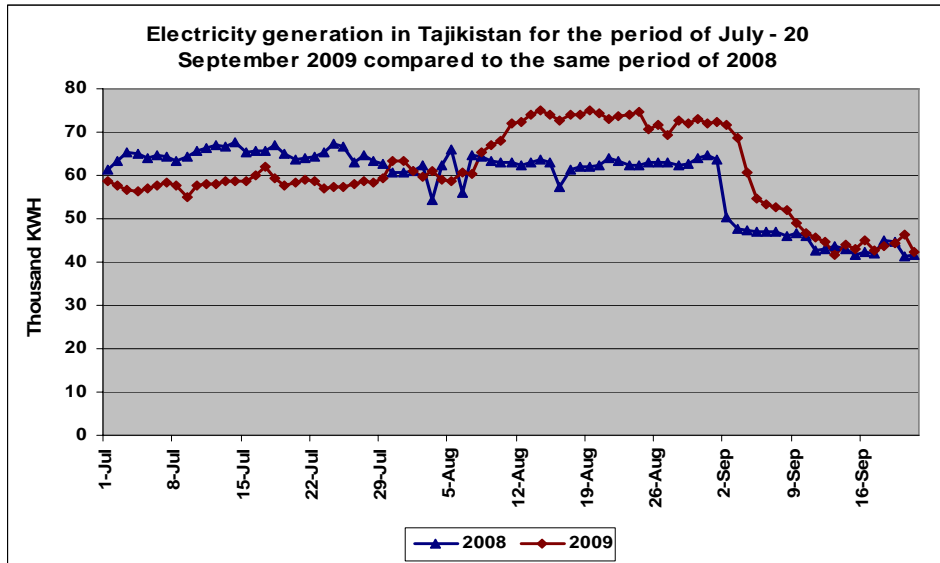
Water inflow to Nurek reservoir was 0.9% less than expected, which consequently decreased the water release by 16%. However, on a positive note, water inflow to Kayrakum reservoir was 93% more than predicted and water release was 179% higher than planned.

3.2 Energy Generation⁸

In the first 20 days of September 2009, over 1 million kWh of electricity was produced in Tajikistan, which is 11% more than during the same period of 2009. On a daily basis, Tajikistan produced 48,000 kWh of electricity during the given period (compared to 43,000 kWh daily during the first 20 days of 2008.)

⁸ Data and information on generation capacity and electricity availability is from OSHC "Barqi Tojik" (Major energy delivery company in Tajikistan), except where otherwise noted

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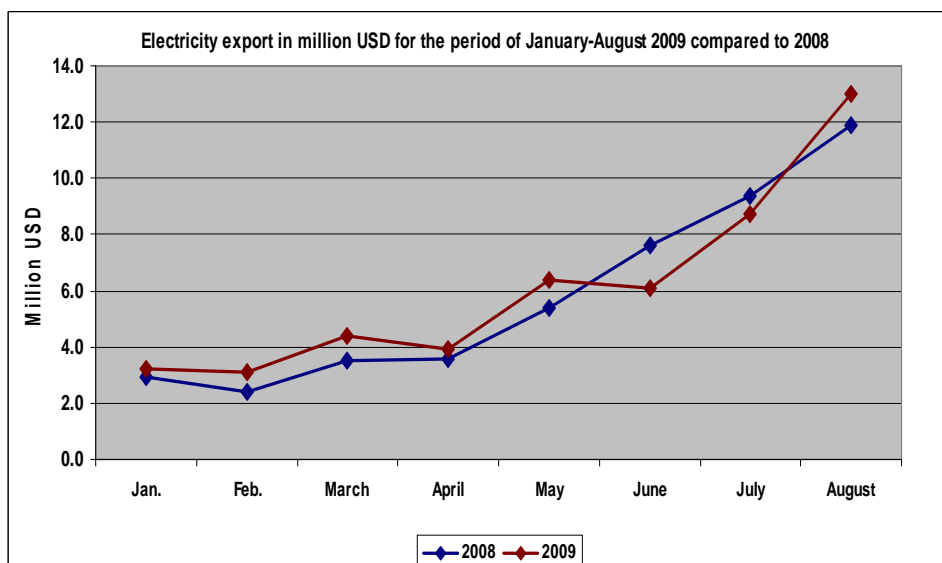


In August 2009, the daily rate of electricity production in Tajikistan averaged 70 million kWh, compared to 62 million kWh on average in August 2008. For the month of August 2009, Tajik hydropower stations (HEPS) produced 2.1 billion kWh of electricity, which is 11.5% more than produced in August 2008. From the beginning of the year to 20 September 2009 Tajikistan produced 11.6 billion kWh of electricity, only slightly (0.6%) less than during the same period of 2008.

3.3 Electricity Export

From the beginning of the year till September 2009, Tajikistan has exported 3.3 billion kWh of electricity. In monetary terms, Tajikistan received 48.8 million USD for electricity exports, 4.5% more than for the same period of last year.

As the table below suggests, in August 2009 Tajikistan exported electricity for 13 million USD, 9% more than for the same period last year.



The main reason for this seems to be the agreement reached on 19 August 2009 by the Ministry of Energy and Industry of Tajikistan with Uzbekistan on exporting 500 million kWh of electricity between August and September 2009.

To the present time, Tajikistan has been exporting 20-23 million kWh per day to Uzbekistan, for a price of 1.5 US cents per 1 KWH. According to sources from Barqi Tojik, this low price does not include the VAT (value added tax) and does not cover the real production costs. However, for Barqi Tojik the deal with Uzbekistan was considered a better option than releasing water stored in hydropower stations at free flow.

Tajikistan reached another positive agreement with Uzbekistan on the transit of Turkmen electricity⁹ through Uzbek territory to Tajikistan. This agreement is important to cover Tajik energy needs during winter. The terms and the regime of the transit are still under discussion. However, according to the Director of the "Eastern magisterial electric lines" of Uzbek state company "Uzbekenergo" Mr. Alexander Galkin, there are some objective reasons that limit the transit of electricity through Uzbek territory. When receiving electricity from Turkmenistan, Uzbekistan cannot transfer it to neighbouring countries.

The imported energy is used in Uzbekistan, and other energy is produced in power stations close to Tajikistan to be transferred. This creates difficulties, including the risk of overloading electrical lines in Uzbekistan.¹⁰

3.4 Gas Import¹¹

Because of the increases in price for imported gas from Uzbekistan (66% compared to 2008), in the first eight months of 2009 Tajikistan has imported only 168 million cubic meters of gas (for 40.3 million USD). This is 21.7% lower than for the same period last year.

In August 2009, due to the 16 million USD debt of Tajiktransgas (the Tajik state enterprise responsible for gas transit and transportation) to Uzbekistan, Uzbekistan decreased the export of gas to the south of Tajikistan by 3,000 cubic meters. During this month Tajikistan received 11,000 cubic meters of gas per hour.

Following negotiations between the two countries, Tajiktransgas has to pay off its debt by 01 October 2009¹². The gas debt has been accruing mainly due to the fact that big industrial companies such as OSHC Barqi Tojik, Tajikcement, Somonsughdgas and TALCO have not paid their gas bills to Tajiktransgas. As TALCO and Tajikcement are important actors for Tajikistan's economy, Tajiktransgas usually continues supplying gas to them in spite of their accumulating debts. However, due to 2.4 million USD of debts, Tajikcement stopped receiving gas in August 2009.

In Tajikistan, due to high prices and supply interruptions, the demand for gas from households has declined over the past years. At present household consumption accounts for only 15% of the total gas consumed in the country, the rest going to industrial enterprises and service companies. As of 01 July 2009, tariffs for natural gas rose by 15% for all users, due to national currency depreciation against the US dollar. Residential customers now pay 1,330 TJS (303 USD) per 1000 m³ of gas, which is 166 TJS (38 USD) more than in previous months.

⁹ Tajikistan has a five-year agreement with Turkmenistan on the import of 1.2 billion kWh of electricity to Tajikistan during the autumn-winter period but the transit modalities need to be negotiated with Uzbekistan each year

¹⁰Asia Plus, 27 August 2009 <http://www2.asiaplus.tj/news/31/56254.html>

¹¹ Data and information from State Unitary Company "Tojiktransgas"

¹² According to the agreement reached between the two countries on 19 August 2009, some of the payment for 500 million kWh of Tajik electricity would cover the cost of gas

3.5 Energy Outlook

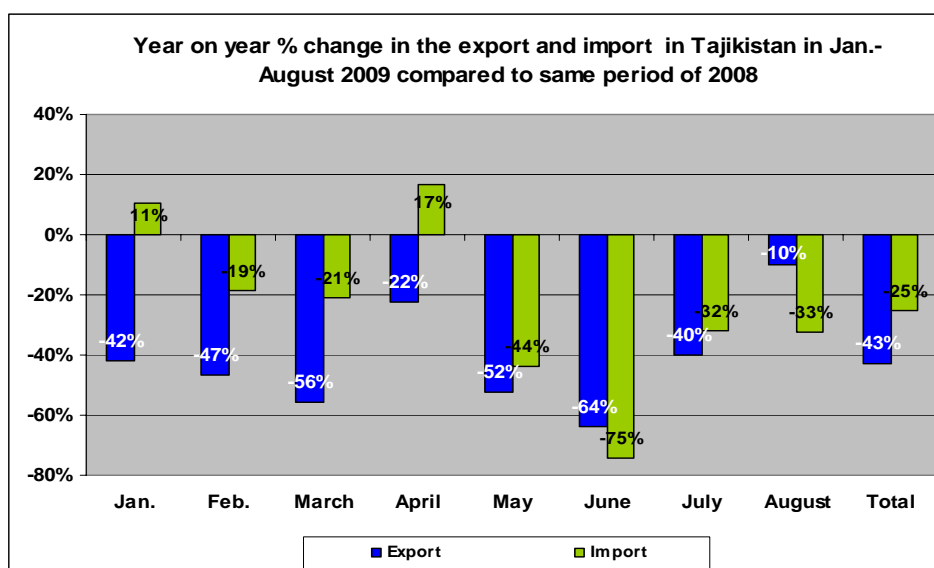
Several factors seem to point out that the risk of disruption of electricity supply in Tajikistan during next winter is less than in previous years. There is an abundance of water in the reservoirs; the HEPS Sangtuda-1 was put into operation this year and will generate a projected 2.7 billion kWh of electricity per year; finally the agreement concerning the transit of Turkmen electricity, if implemented, would help to cover the winter electricity deficit (of 3.5-4 billion kWh in past years).

In a recent statement¹³, the Ministry of Energy and Industry of Tajikistan projected that for the coming autumn-winter season nationally produced electricity, coupled with imported electricity from Turkmenistan, will be sufficient to cover the needs of the Tajik market, hence avoiding importing additional electricity from neighbors as was usually practiced.

IV. ECONOMY AND MIGRATION

4.1 Macroeconomic Trends

The Gross Domestic Product (GDP) for the first 8 months of 2009 amounts to 12,024.5 million TJS, a 1.8% increase compared to the same period of 2008. The GDP is distributed as follows: 51.7% from services such as transportation, communal and market services; 37.7% from industrial output such as industry, agriculture and construction; and 10.6 % from taxes.¹⁴



In August 2009 exports have decreased by 9.8% and imports by 32.6% compared to August 2008. For the first 8 months of 2009, export has decreased by 42.8% and imports by 25.3% compared to the same period of 2008. Eight-months revenues from foreign trade to the State budget were 31% lower than during the same period of 2008. The trade deficit in August 2009 was 1018.9 million USD.

¹³ Article from Asia Plus from 19 August 2009, <http://www2.asiaplus.tj/news/31/55988.html>

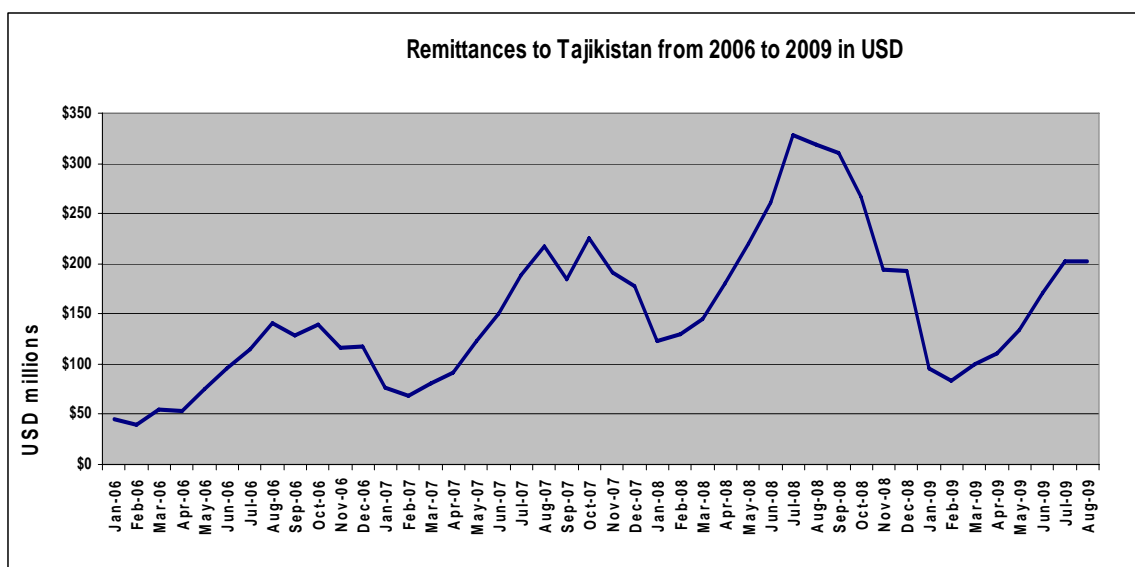
¹⁴ Bulletin "Socialno-ekonomicheskoe polozhenie Respubliki Tadjikistan", State Committee for Statistics, p. 142

The export slowdown is mainly attributable to the decline in global demand and prices for Tajikistan's primary export commodities, aluminum and cotton.¹⁵ Data from the Tajik State Committee for Statistics shows that cotton export revenues fell by 34.5% and industrial outputs fell by 11.4% during January – August 2009 in comparison to the first 8 months of 2008.¹⁶

As a consequence of the sharp decrease in exports and industrial production, Tajikistan's economy received 460 million USD less than it did during the same period of last year and levels of underemployment rose as industries had to release workers and put them on unpaid leave.¹⁷ The economic downturn also decreased tax revenues by 10.8%, which in turn had a negative effect on the national budget¹⁸ and the state capacity to implement social spending and anti-crisis programs. Media report that: "delays on wages and pensions are already occurring, and appear to be worse in rural areas".¹⁹

4.2 Remittances

Another negative influence of the global financial crisis on Tajikistan is a declining demand for Tajik labor abroad. Remittances from labor migrants are one of Tajikistan's main sources of income, estimated to represent between 30 and 50% of Tajikistan's GDP.



The volume of remittances to Tajikistan over the first 8 months of 2009 dropped by 35.5% compared to the same period of 2008, reinforcing Tajikistan's external vulnerability. In August 2009, Tajikistan received 202 million USD in remittances.²⁰ This is the same figure as in July 2009, and a 36.6% drop in year-on-year terms. For the first time since the beginning of the year, monthly remittance inflows were lower than in 2007, indicating that the decline is still worsening.

¹⁵ According to Gulomjon Bobozoda, the Minister of Economic Development and Trade, during January-August 2009 the price for aluminium declined by 46% and the price for cotton by 19%.

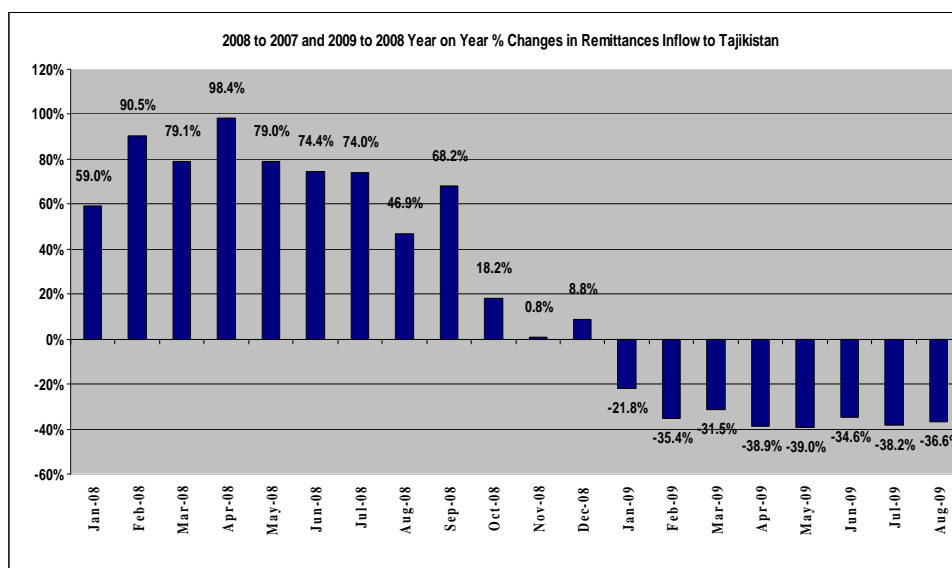
¹⁶ Bulletin "Socialno-ekonomicheskoe polozhenie Respubliki Tadjikistan", State Committee for Statistics, p. 220

¹⁷ «TAJIKISTAN'S ONLY GROWTH AREA», IWPR, Reporting Central Asia No. 585 Part 2

¹⁸ The State budget for January–August 2009 was 3,329 million Tajik Somoni (TJS), which is 27.7% of the GDP.

¹⁹ Ibid

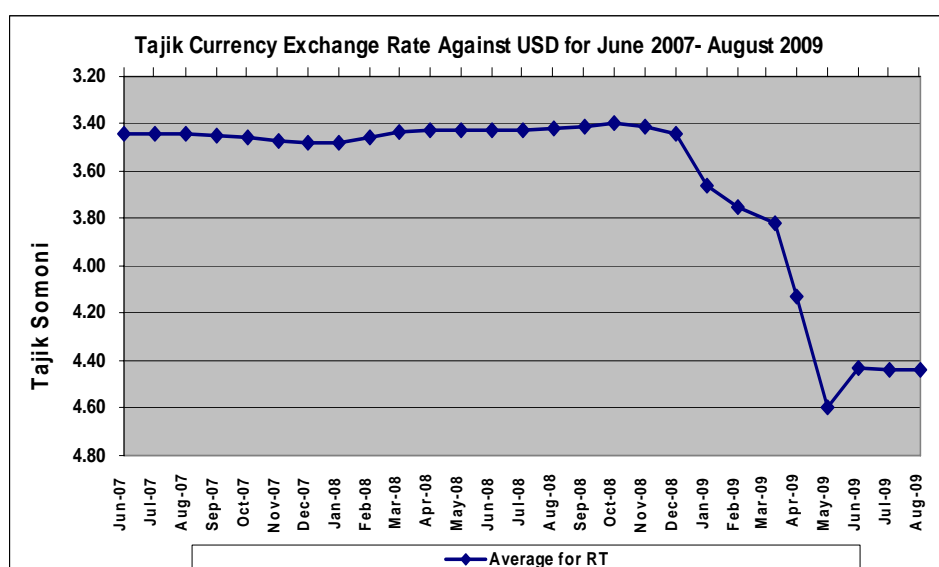
²⁰ Data obtained from the IMF mission in Tajikistan



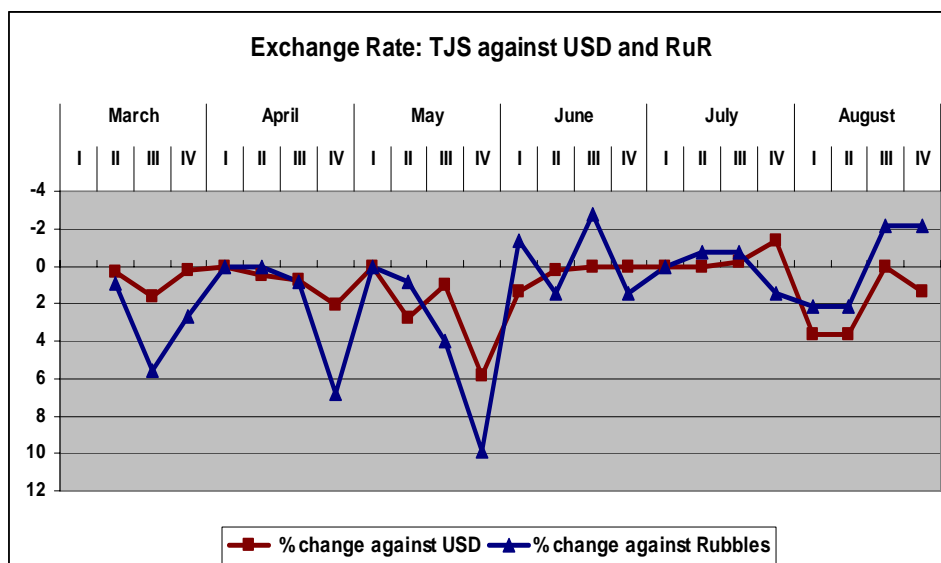
The overall decline in remittances for the first 8 months of 2009 certainly played a role in the reduction of imports (by 25.3% as previously mentioned), as remittances are often used to pay for goods and services on the domestic market. Perhaps more importantly, the significant decrease in remittances in 2009 (compared to 2008) and the continuing inflation — especially for foodstuffs — raise concerns about household incomes, and consequently about households' capacity to purchase food and other basic goods. These concerns are particularly important for the most vulnerable households.

4.3 Exchange rate trends

Over the first 8 months of 2009, the Tajik Somoni (TJS) depreciated by 22.2% against the USD and 19.7% against the Russian Ruble. This could be partly linked to the 35.5% drop in remittances over the same period on year-on-year comparison. In the middle of August, the Somoni slightly appreciated by 4% (from 4.56 to 4.39 per 1 USD); after that, the exchange rate stabilized.²¹



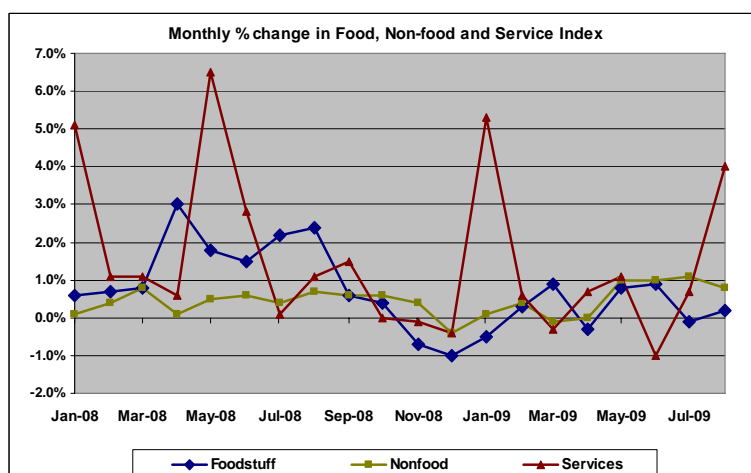
²¹ Source: National Bank of Tajikistan, www.nbt.tj



A number of possible explanations have been advanced for the appreciation of the Tajik Somoni in July, including the intervention by the National Bank of Tajikistan, unexpected growth in Dollar and Ruble inflows onto retail foreign exchange markets, as well as a growing preference for Yuan over Dollars by Chinese traders. If this trend persists, it could help stabilize Tajikistan's external position.

4.4 Consumer Price Index²²

Despite strong global deflationary pressures, inflation remains high in Tajikistan increasing by 7.7% in January – August 2009 compared to the 8 first months of 2008.



The currency depreciation, coupled with rising global oil prices, has exerted upward pressure on the consumer price index (CPI), even in the face of global deflationary pressures and sharp declines in the prices of Tajikistan's exports.

²² The Consumer Price Index (CPI) is a measure of the average price of consumer goods and services purchased by households

From the beginning of the year, the CPI rose by 4%. This includes 2.1% on foodstuff, 4.4% on non-food and 12.3% on services. Between July and August 2009 the overall consumer price index increased by 0.9%, including 4% for services, 0.8% for non-food and 0.2% for foodstuff.²³ As a source from the National Bank of Tajikistan explained, the increasing index for services is mainly due to increases in the price for fuel and energy.

4.5 Food and Fuel Prices

Food basket composition	
Product	% of basket expenditure
Bread	34%
Vegetable	26.40%
Meat	14.80%
Cotton oil	7.30%
Sugar	7%
Milk/dairy	7%
Eggs	1.90%
Other	1.60%
Total	100%

According to the State Committee for Statistics, at the end of July 2009 the price for the individual consumer food basket was 91.51 TJS (21 USD), whereas the monthly nutritional requirement (defined based on a survey from 2008 by the State Committee on Statistics) amounted to 179.22 TJS (41 USD).²⁴

As the table shows, most of the expenditures in the food basket go for bread and vegetables during the summer and early fall.

Food prices²⁵

As the table below suggests, prices for main food items remained unchanged if compared to July. Price increases have been registered mostly on the markets of Dushanbe and Gharm.

Month-on-month percent change in food prices in August 2009					
Commodity	Dushanbe	Gharm	Khorog	Khujand	Kurgan-Tyube
Rice	7.1	0.0	0.0	0.0	0.0
Wheat Flour 1st grade	-7.7	0.0	0.0	0.0	0.0
Vegetable Oil	-6.3	7.7	0.0	0.0	0.0
Cotton oil	0.0	18.2	0.0	0.0	0.0
Beef	0.0	0.0	0.0	6.7	0.0
Potato	25.0	-5.9	0.0	0.0	7.1
Pulses	14.3	12.5	0.0	0.0	0.0
Milk	0.0	0.0	0.0	0.0	0.0
Egg	0.0	33.3	12.5	0.0	0.0

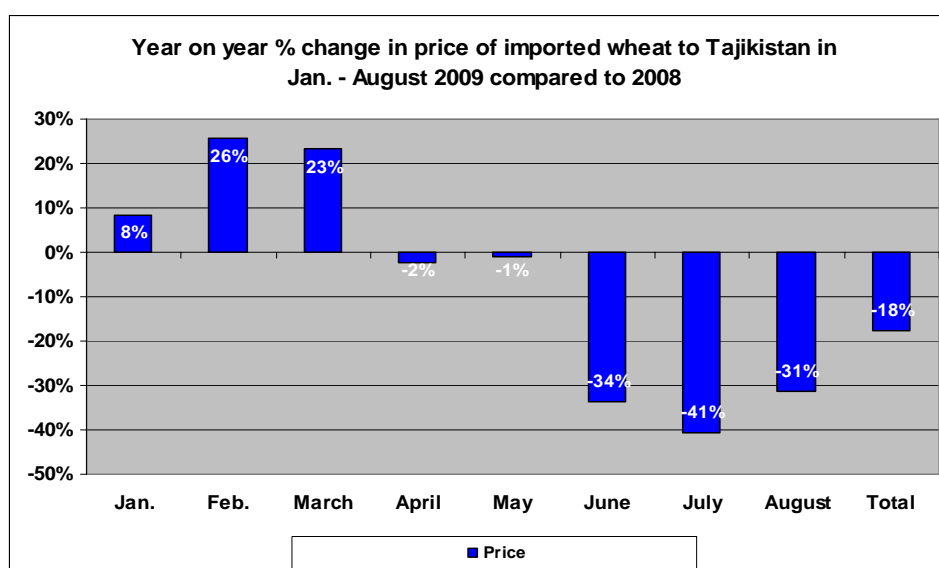
During Ramadan prices for food traditionally increase. However, this year prices for main food items remained relatively unchanged in most regions of the country. Only on Dushanbe markets increased prices by 7.1% for rice, 14.3% for pulses and 25% for potatoes despite the start of the harvest season.

²³ Data from National Bank of Tajikistan

²⁴ "Socialno-ekonomicheskoe polozheniye Respubliki Tadjikistan", State Committee for Statistics, Republic of Tajikistan, July 2009, p.187

²⁵ Food and Fuel prices were obtained from WFP Food Security Weekly Market Monitoring, Tajikistan

According to WFP, in July prices for wheat flour and potatoes should decrease thanks to the start of the harvest season, which increases the supply to local markets. In August 2009 prices for wheat flour (1st grade) remained unchanged or decreased, partly thanks to the stabilization of the national currency rate against the USD and low import prices.



Food Security²⁶

According to quarterly report of Food Security Monitoring Survey carried by WFP and WHO, acute as well as chronic malnutrition have increased significantly since January 2009. The almost double increase in wasting appears to be related to a high incidence of diarrhea in children during the summer months. Dietary diversity has improved in both children and women due to greater food availability. Both dietary diversity and nutritional status seemed to be influenced by food availability and access at the household level.

Around 1.4 million people were identified as food insecure, 390,000 of them severely. Compared to the previous round (May 2009) the extent of food insecurity in Tajikistan remains the same. More than half of the food insecure people are chronically food insecure. The rest are victims of shocks, which explains variation between zones over time.

As in the previous round, the level of severe food insecurity in the country remains at around 9% of the rural population. The situation did not deteriorate mainly due to a good harvest of wheat, vegetables and fruits and to assistance provided to households affected by heavy rains in certain areas.

Moderate food insecurity has mainly decreased in Sughd, but remains at similar levels in other regions as in May 2009. The lack of improvement of moderate food insecurity at a time when better physical access should allow households to be food secure is mainly due to external shocks creating pockets of severe food insecurity.

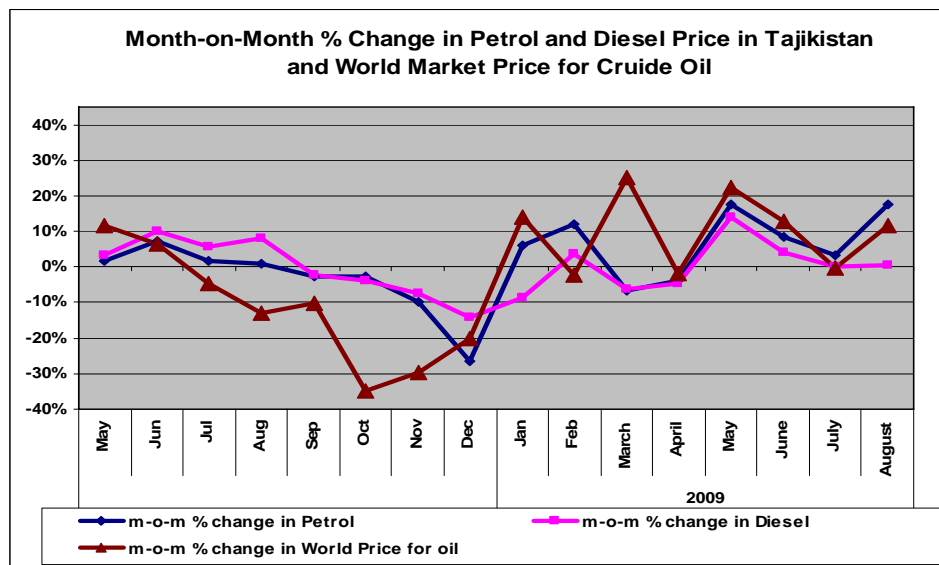
Sughd and Khatlon have been replaced as the most food insecure regions by DRD, due to economic shocks (especially the loss of employment and decrease in remittances). The most food insecure zones in Sughd and Khatlon are the same as they were in May; they can now be seen as priority zones for long-term interventions and also as the most vulnerable to shocks.

²⁶ Food Security Bulletin of September 2009, World Food Programme and World Health Organization, Tajikistan 2009

The outlook for the next three months is relatively good, thanks to a good harvest. Households will be able to stock assets or covering other expenditures. But the food price and economic crises still threaten these fragile improvements. Moreover, the increase of expenditures related to education and religious events (end of Ramadan) will add to the precariousness of the most vulnerable rural households.

4.6 Fuel prices

According to WFP data, the average price for petrol in the country in August was 3.86 TJS (0.8 USD) per liter, and the average price for diesel was 3.04 TJS (0.6 USD) per liter. While the price for diesel remained unchanged, towards the end of August 2009 the price for petrol in Tajikistan increased by 17.7% compared to July 2009.



From the beginning of the year, the world market price for oil has increased by 104.5%. In Tajikistan, for the same period, prices for petrol increased by 56.9% and diesel by 10.8%, exerting upward pressure on the CPI of Tajikistan.

As it was mentioned above, the increase in price for fuel pushed prices for services further up. A source from the Ministry of Economic Development and Trade explained this price increase with the 45% increase in taxes (USD 483 per one ton of fuel in August 2009 compared to USD 335 per 1 ton in January 2009)²⁷ as well as the decrease in supply from exporting countries and increased prices for fuel on the world market. On the world market, the price for oil has increased from USD 60 to USD 72 per barrel in August 2009 (20%) compared to the previous month.²⁸

4.7 Migration and Employment

From January to the end of August 2009 more than 478,545 people officially emigrated from Tajikistan. The majority of the migrants left from the Directly Ruled Districts (DRD), Sughd and Khatlon provinces.²⁹

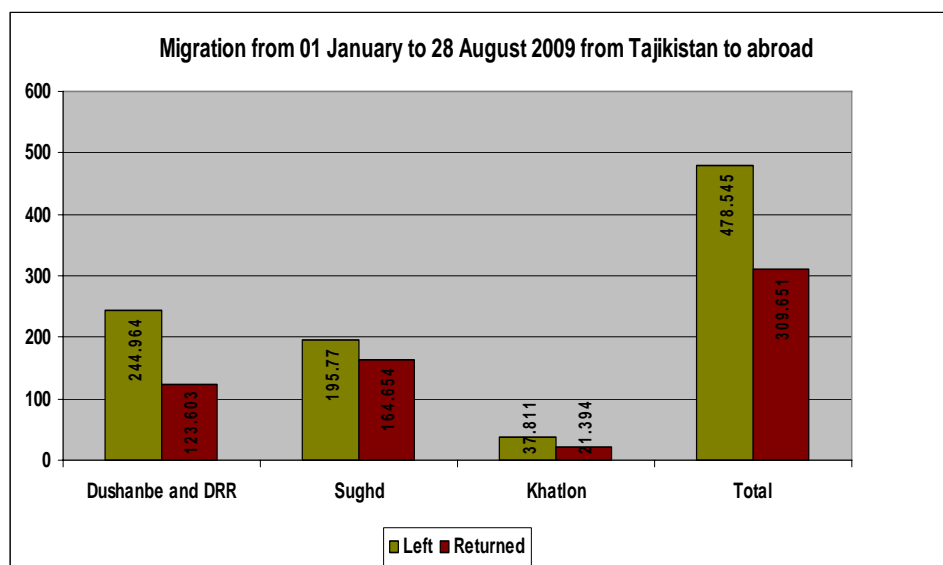
The graph below suggests that, despite the uncertainties with regard to employment in the Russian Federation and other countries of the CIS, emigration numbers do not seem to be declining. And the number of returning migrants seems

²⁷ <http://www2.asiaplus.tj/news/49/55941.html> Web links should include the date at which they were consulted

²⁸ http://tonto.eia.doe.gov/dnav/pet/pet_pri_wco_k_w.htm

²⁹ Data is obtained from International Labor Organization office in Tajikistan

much less than the number of those who are leaving the country (35% less than the number of leaving migrants).



In terms of employment, data from State Statistical Committee of Tajikistan shows that the official number of registered unemployed people has reached 45,000. However, the unofficial figure is probably much higher. The majority of registered unemployed people are women and people under 30 years old.

An additional factor negatively affecting the social situation in the country is the limited capacity of the national budget to react to the current economic downturn. The reduction in State revenues and tax collection limits the ability of the Government to implement social programs and anti-crisis measures.

The Ministry of Labor and Social Protection of Tajikistan reports that the total amount of the Government's arrears to the population, in terms of wages and pensions, has increased by 1.8% in August 2009 compared to the same period of 2008. One of the main reasons for this delay in payments is the difficulty for the Government to collect social taxes.

The average wage paid in July 2009 is 301 TJS (69 USD), which is a 4.7% decrease compared to the previous month. According to WFP FSMS data, in August 2009 the monthly wage for skilled labor was 35-80 TJS (8-19 USD), which is less by 6-21% than in 2008. The monthly wage for unskilled labor ranked around 20-50 TJS (5-12 USD), 17-30% less than in August of last year.

V.I AGRICULTURE³⁰

5.1 Harvest Season

The State Statistical Committee of Tajikistan reports that in August 2009 Tajik farmers collected 589,000 tons of wheat and 64,000 tons of potatoes. From the beginning of the harvest season Tajikistan harvested 633,318 tons of wheat, which is 49% more than during the same period of last year. During the same period Tajikistan produced 259,000 tons of potatoes, a 16.6% increase compared to 2008.

³⁰ This information was made available by FAO in Tajikistan

An increase in harvest yields was mainly due to the good quality of seeds imported earlier this year by the Ministry of Agriculture and FAO through the Unilateral Trust Fund, better precipitation and, most likely, the increase of grain areas.

5.2 Outbreak of Small Ruminant Plague

The "Peste des Petits Ruminants" (PPR) also called "small ruminant plague", is a highly infectious viral disease of small ruminants (sheep, goats, etc.).³¹ Morbidity ranges from 10 to 80% and mortality among affected animals can reach 90%. The disease affects areas in cycles, with several year of interval without disease because the majority of sheep and goats are immune after surviving a mild case of PPR in the earlier wave.

The current outbreak of PPR in Tajikistan was reported in May 2009 from Khatlon and DRD regions. Pathological tests undertaken by the Foot and Mouth Disease (FMD) Institute on 10 June 2009 and laboratory test results have now confirmed the presence of the PPR virus in the affected districts. The disease is especially severe among goats; for the reporting period more than 10,000 cases have been reported in affected districts. The current clinical picture is very similar to the one observed in 2004-2005.

At this stage it can only be speculated that the onset of outbreaks is due to the congregation of animals from different areas of the country. Khatlon region may be considered at higher risk because it is the region with the highest density of small ruminants (approximately 2 million) and because a high proportion of sheep and goats now on summer pasture will return to Khatlon in late September and early October. The risk is also relevant in DRD, as this region has 500,000 small ruminants. Recent reports also confirmed PPR outbreaks in the Badakhshan province of Afghanistan that might further deteriorate the situation in Tajikistan unless quick action is taken.

Since PPR affects only the owner of affected livestock suffers loss, albeit sometimes quite severely, livestock owners need to finance the vaccine and vaccination service costs themselves. Lower income households face more difficulties in paying for the vaccine, and hence are more at risk.

The State Veterinary Inspection (SVI) of the Tajik Ministry of Agriculture, on behalf of the Government of Tajikistan, has formally requested FAO to provide necessary assistance and supply the badly needed vaccines against PPR³². The Government of Switzerland provided a grant of almost 80,000 USD to procure quality-assured PPR vaccines from international suppliers and to organize a vaccination campaign for at least 1 million small ruminants in affected areas over the next 3 months.

³¹ In small ruminants, PPR infection is characterized by depression, not eating, high fever, nasal and ocular discharge, a reddened and sore mouth with a foul odour followed by diarrhoea with rapid breathing and coughing

³² Currently, there is no long-term strategy for delivering annual preventive vaccinations against PPR. FAO recommends that the Government of Tajikistan liberalizes the veterinary vaccination policy and regulations in order to allow private sector delivery of selected vaccines

Risk Monitoring and Warning System

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