



WFP/FAO Round 3 Results (March – April 2022)

29 June 2022

Survey Coverage

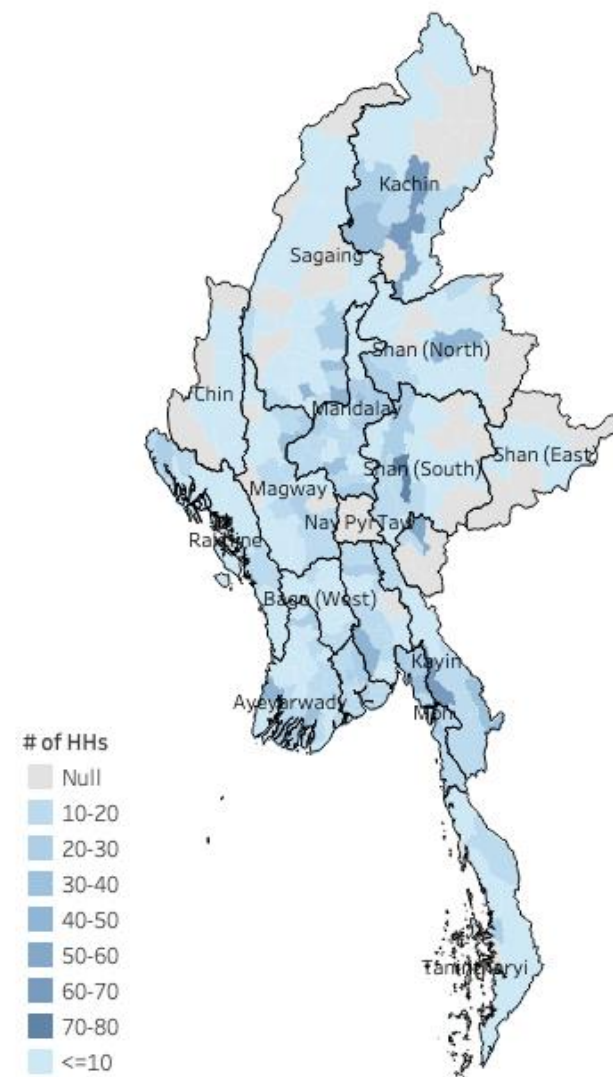
Increased coverage from round 2 (Aug/Sep 2021), although challenges in reaching respondents in certain states (small samples in Chin, Kayah, Tanintharyi)

- **3,518** households in **14** states/regions (an increase compared to **2,708** households in 9 states/regions in round 2)
- Phone interviews conducted between 17 March to 5 May 2022, with 2 week pause over Thingyan holidays (9 – 24 April)
- Weighted by population, location (rural/urban), and education of the household's head

Sample Characteristics

- 53 percent rural, 47 percent urban
- 53 percent agricultural, 47 percent non-agricultural households

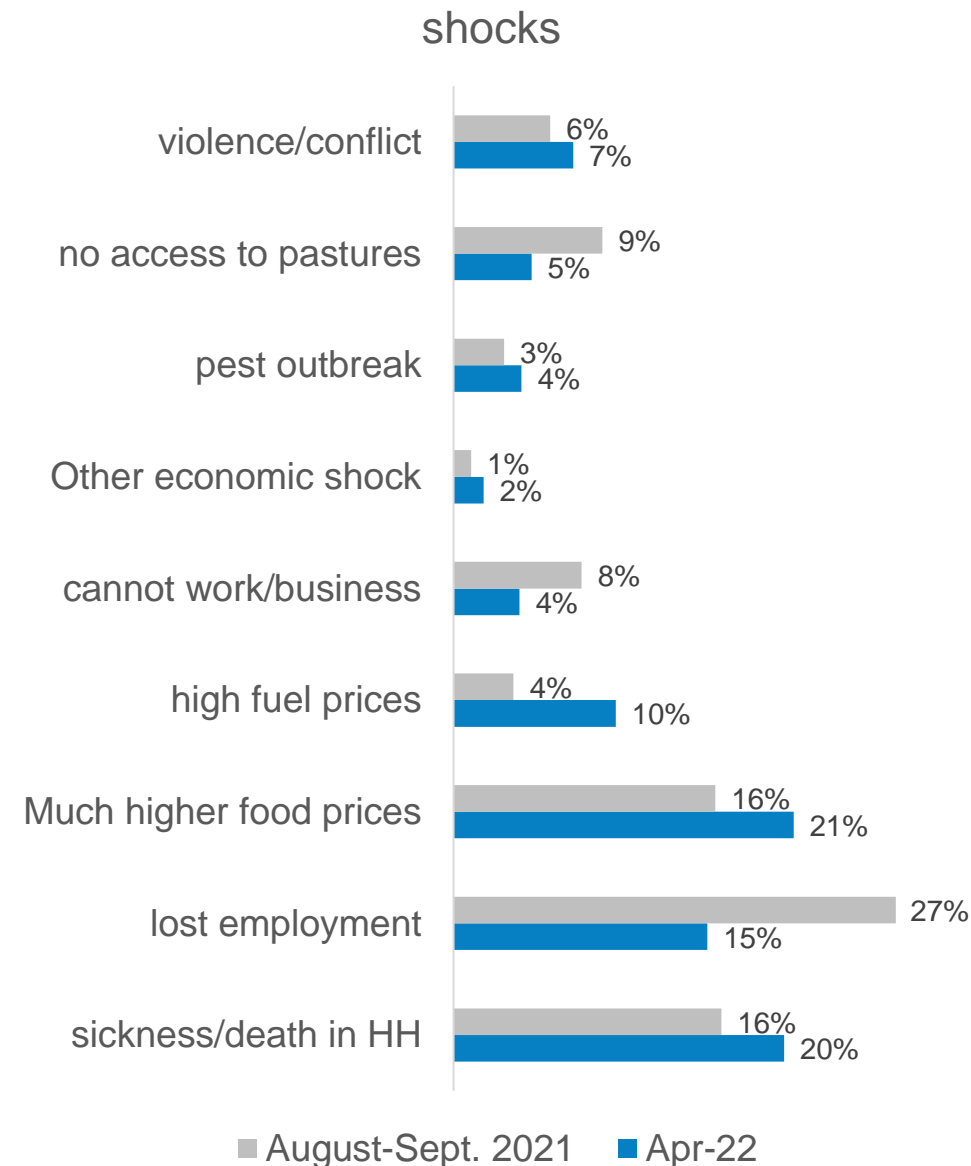
*** note that while proportions of rural/urban are same as by agricultural activity, rural HHs are not necessarily agricultural and vice versa.*



Shocks & Covid impact

61% of households reported shock in prior 3 months (R2: 55%) and 30% experienced 2 or more shocks

- **Most common are economic shocks**
 - 1 in 3 households (35%) in R3, slight decline from R2 (39%)
 - Decline in reports of **lost employment** (from 27% to 15%),
 - Increase in reports of **high food and fuel prices** (from 16% to 21%)
- **Direct impact of violence and conflict** high in certain areas:
 - Kachin (15%), Sagaing, Mon, Shan, Magway, and Kayin (9-10% each)
 - Chin (49%) and Kayah (56%), but with a small sample sizes
- **Less impact of covid restrictions in R3 (29%) compared to R2 (51%)**
 - But not associated with economic shocks
 - Higher proportion in Rakhine (40%), Kachin and Shan (38% each)



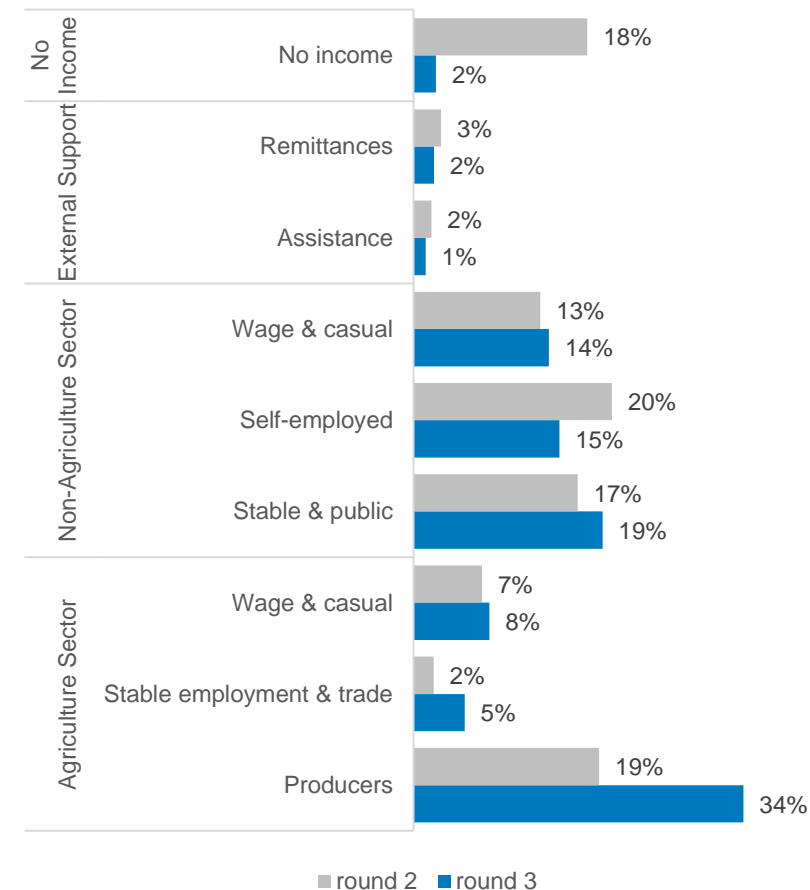


Food Security Update

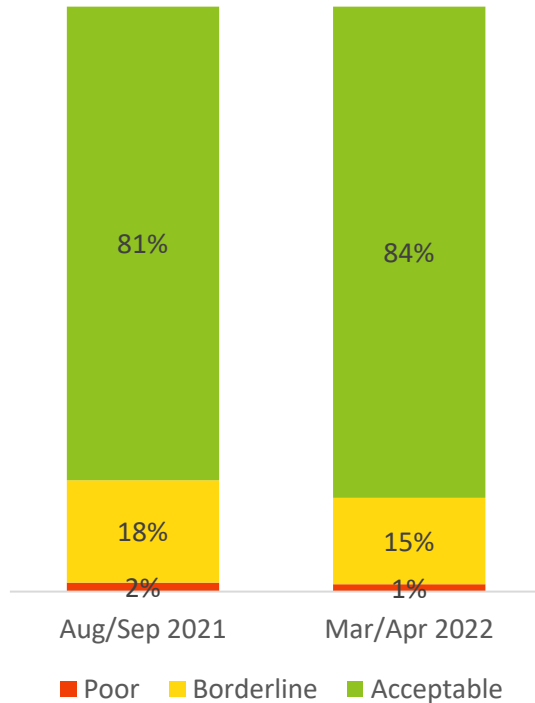
Household Incomes

- **Fewer** households reported **no income** in R3 (2% compared to 18% in R2) except in Chin and Kayah (22%, 12% but small sample sizes) and S. Shan (8%)
- **2%** reliant on remittances, **1%** on assistance. Likely due to less covid restrictions and increase in seasonal opportunities
- **59%** reported a **reduction in total income** compared to the same time last year (higher among those engaged in wage or casual labour on and off farms and among self-employed)
- **52% incurred debt** within the last year and of those, **50%** believe they will have to borrow more

Proportion of Households by Main Income Source, R2 to R3



Food Consumption and Coping (FCS and rCSI)



16% of the population had insufficient (poor/borderline) food consumption in Mar/Apr 2022, a slight improvement from **19%** in Aug/Sep 2021 (R2)

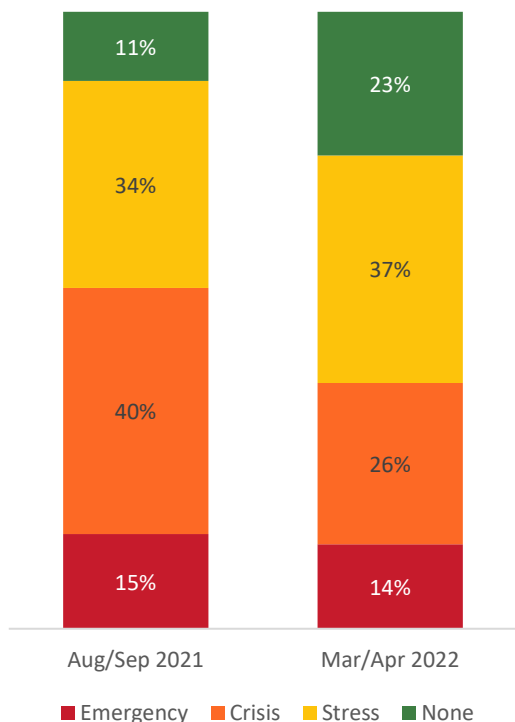
Worse food consumption outcomes in:

- Rural areas (**18%** insufficient) compared to urban (**11%**)
- Kayah and southern Shan (**31%** and **29%** with insufficient diets respectively)
- Wage / casual labourers on and off farms and with no income (**23-25%** insufficient)

40% reported relying on less preferred/less expensive foods due to lack of food or money to buy food, reflective of deterioration in purchasing power

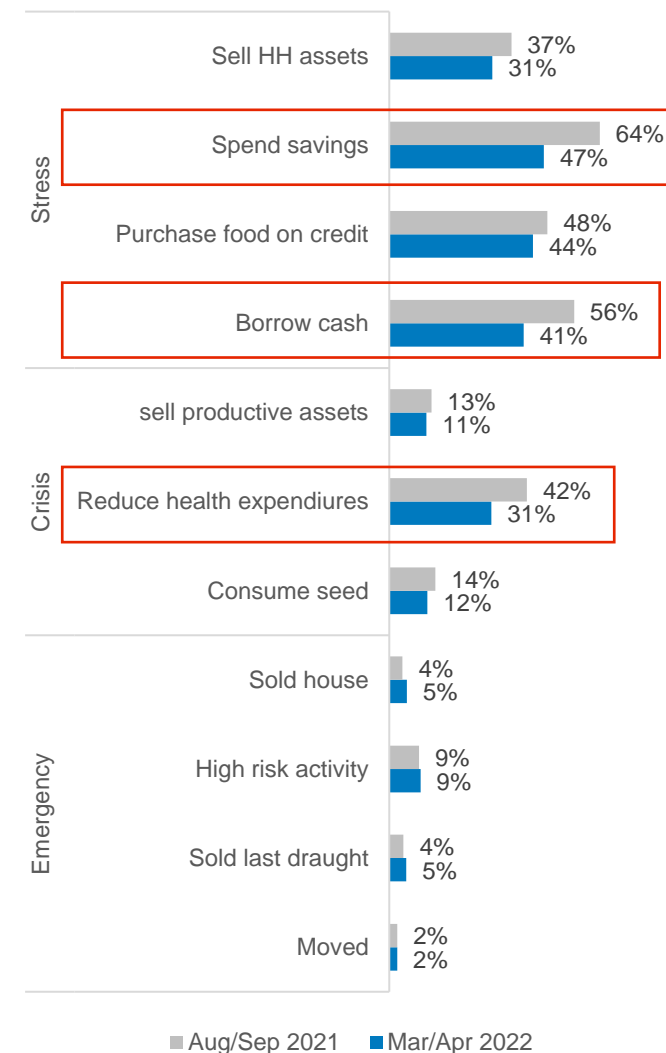
Outcomes worse among more economically stressed & those experiencing greater shocks

Livelihood Coping (LhCSI)



- Overall, **77%** households used at least one coping strategy and **40%** used crisis or emergency coping. This is a **reduction from 89%** using at least one and **55%** using crisis or emergency coping **in Aug/Sep 2021 (R2)**.
- Similar proportion relying on emergency strategies compared to last round, while decrease in proportion using crisis and stress coping
- Heavier reliance on crisis or emergency coping strategies in:
 - Kayah (**54%**), Kayin (**53%**) and Rakhine (**51%**)
 - And **among economically stressed** – **50%** who experienced *income reduction, had no income or informal work (esp/ wage or casual labor on and off farms), and incurred debt in last one year*

Strategies to cope with lack of food or money to buy it in last 30 days

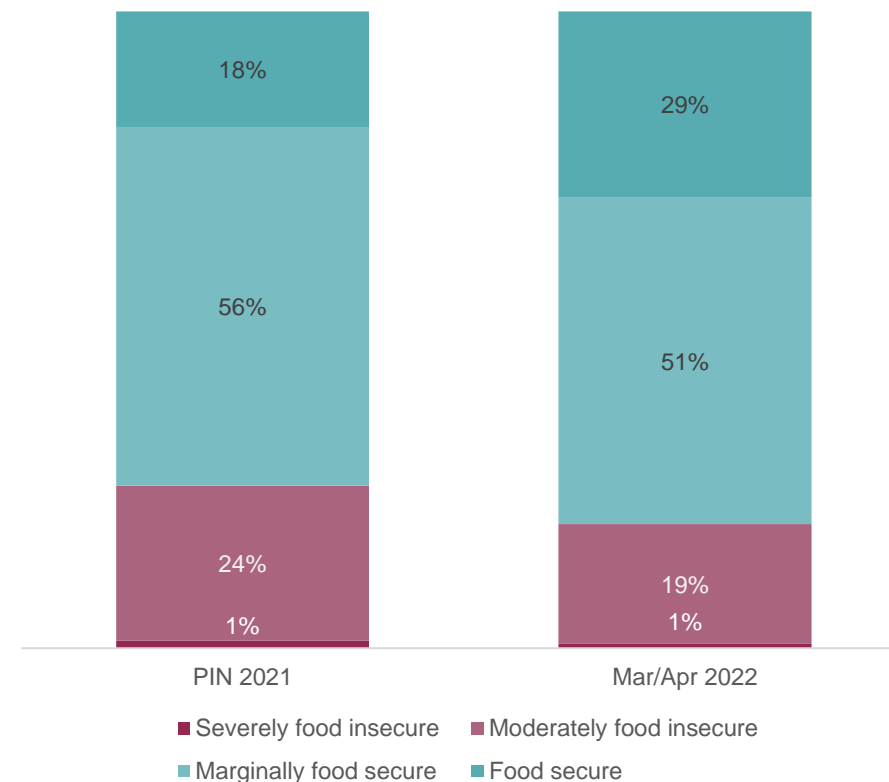




Food Insecurity (rCARI)

20% of the population was food insecure based on the data from March/April 2022 (10.8 million people, of whom 1m are IDPs) compared to 1 in 4 (25%) food insecure in October 2021*

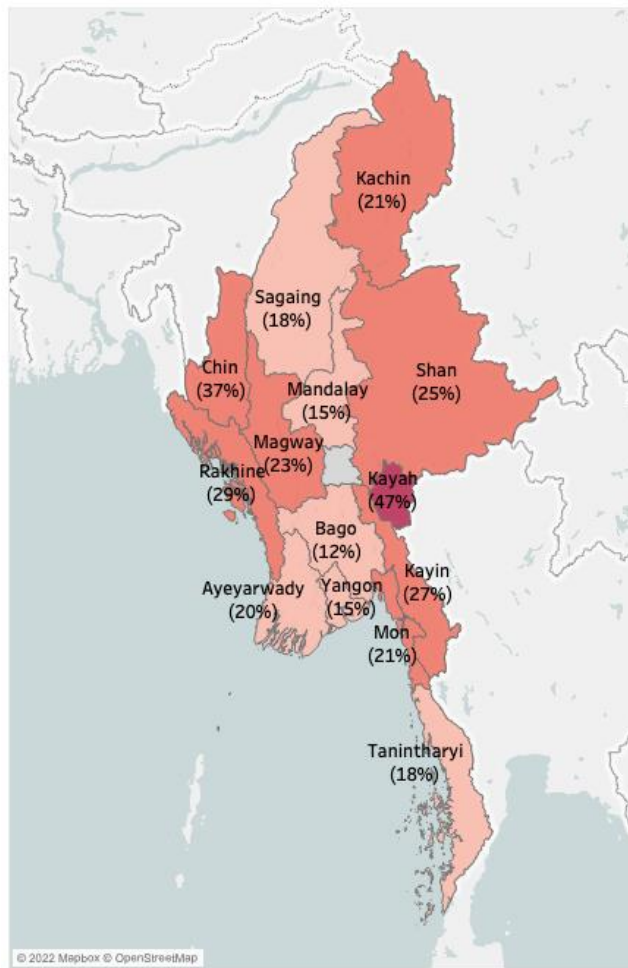
- Improvement in food security likely due to seasonality that drove improvements in food consumption and work opportunities.
- Further gains possibly hindered by the ongoing political and economic distress and compounding of shocks on households, particularly rising food and fuel prices that erodes purchasing power
- Concern for upcoming lean season as conditions expected to worsen



* Note that the PIN of 13.2 million, or 1 in 4 people (25%), was calculated using results from 2 surveys (WFP/FAO R2 survey + a separate WFP survey) because round 2 of the FAO/WFP survey did not cover all state/regions.

Food Insecurity (rCARI): Profile of the most vulnerable

% food insecure (moderately + severely)



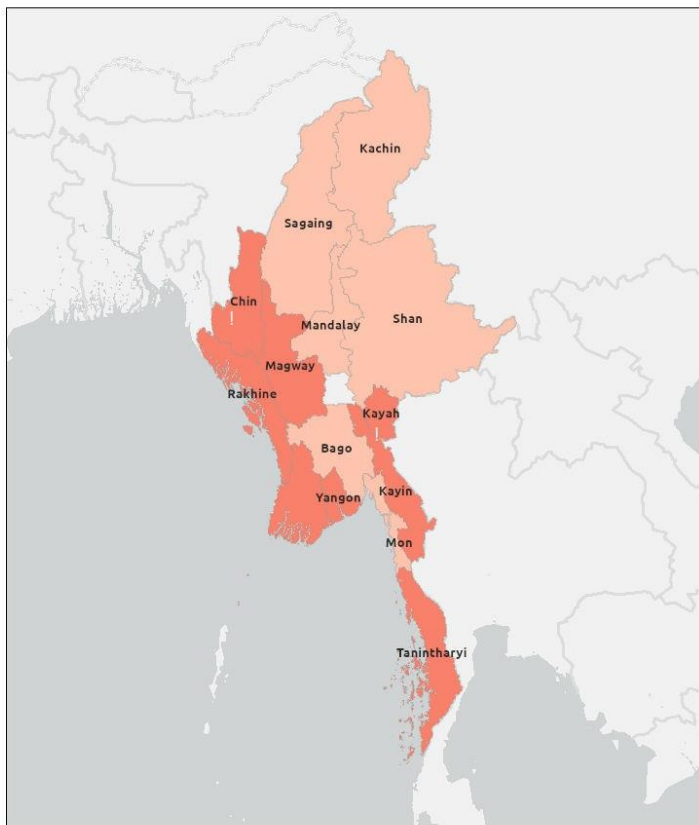
% Food Insecure

Not surveyed	20-40%
0-20%	40-60%

- Higher in Chin, Kayah, Shan (particularly in southern Shan)
- Vulnerability to food insecurity is cutting across rural/urban and non-agricultural versus agricultural households.
- Higher food insecurity associated with shocks, economic stress and with indicators of poverty
 - Those experiencing economic shocks (**28%**) and multiple shocks (**30%**)
 - Those with debt incurred in last 1 year (**25%**)
 - Reduced number of income earners compared to last year (**31%**)
 - Semi-permanent or temporary housing (**20-26%**)
 - Female headed households and household heads with no education (**25%** each)

Food Insecurity Experience Scale (FIES)

Prevalence of recent moderate or severe household food insecurity (FIES)



2022/06/09

Prevalence of recent moderate or severe household food insecurity (FIES)

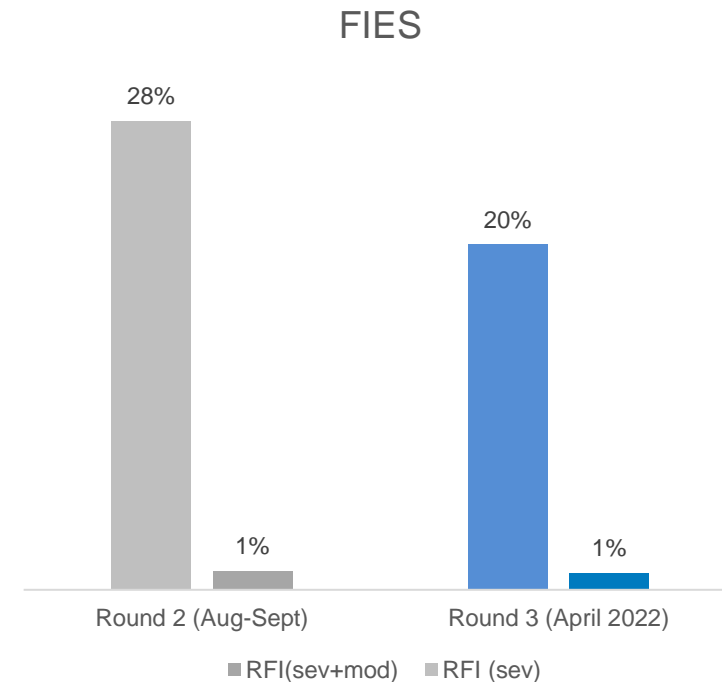
0 - 20
> 20 - 40

1:11,520,198
0 90 180 360 mi
0 150 300 600 km

Sources: Esri, HERE, Garmin, FAO, NOAA, USGS, © OpenStreetMap contributors, and the GIS User Community

Made by: Office of Emergencies and Resilience
The Food and Agriculture Organization of the United Nations

- Recent food insecurity (moderate and severe) decreased from a prevalence of **28% in R2** to **20% in R3**, with severe recent food insecurity **remaining stable at 1%.**
- Convergence of indicators between FCS, LhCSI and FIES, identifying Kayah, Chin, Rakhine, Kayin and Magway as the states/region with the worst outcomes.





Agriculture Update

Crop Production

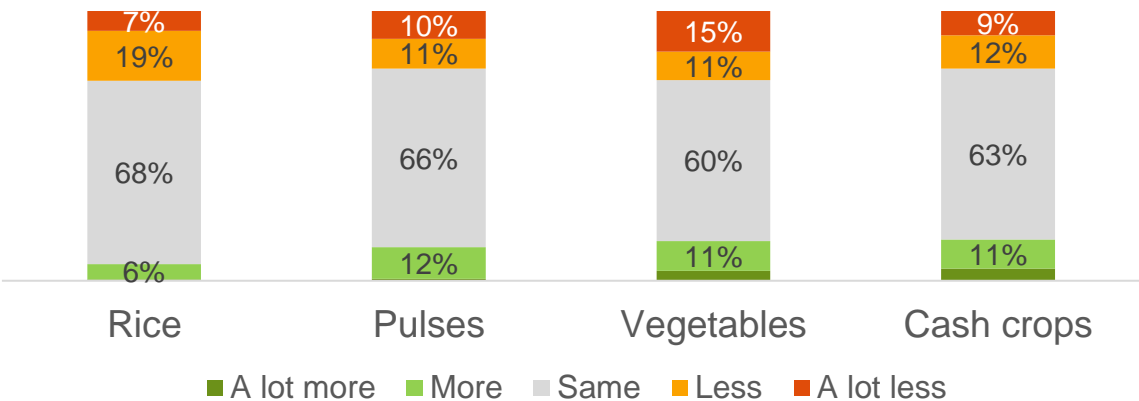
Last round (Aug/Sep 2021) identified a retrenchment of planted area. In this round, there was no sign of reversing the trend.

- The share of farmers who planted less was particularly high in Rakhine and Shan (more than 30% planted less).
- HHs planting less was **associated with shocks**

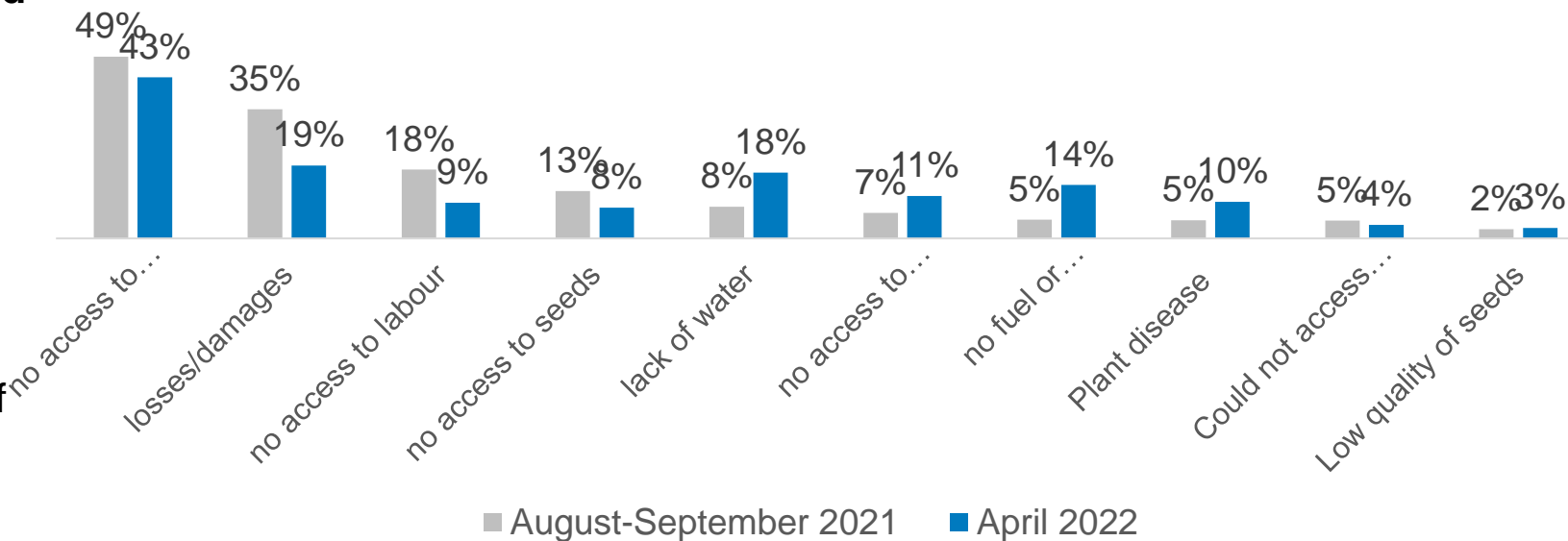
Access to fertilizer continues to be key issue (43% of farmers, particularly rice, 56%); lack of water, plant diseases and access to fuel more frequent, compared to last round

- Fertilizer challenges mentioned by more in **Shan (59%) and Rakhine (61%)**.
- Water access issues mentioned by more in **Sagaing (30%), Mandalay (25%) and Mon (26%)**.
- 26% of farmers in Rakhine mentioned lack of access to seeds.

Area planted



Difficulties in crop production



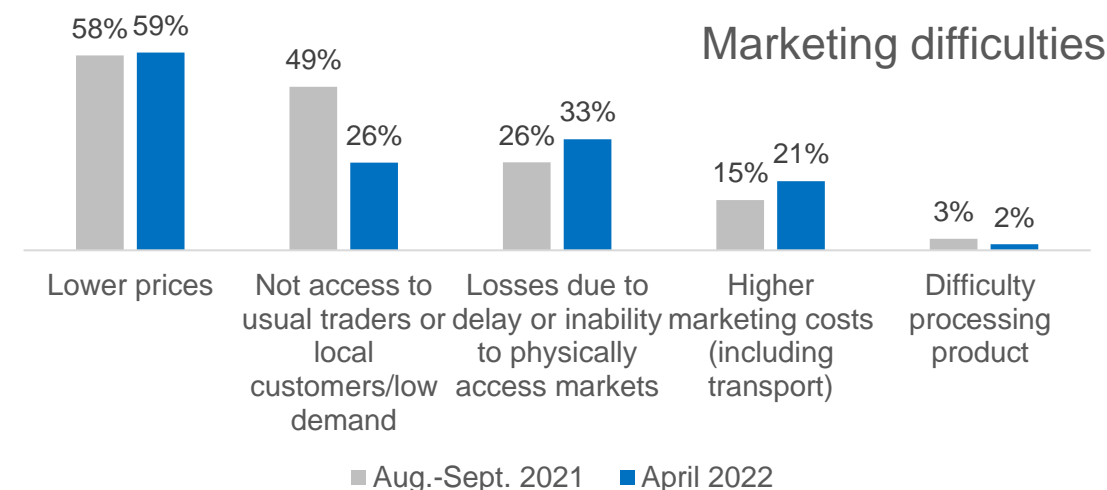
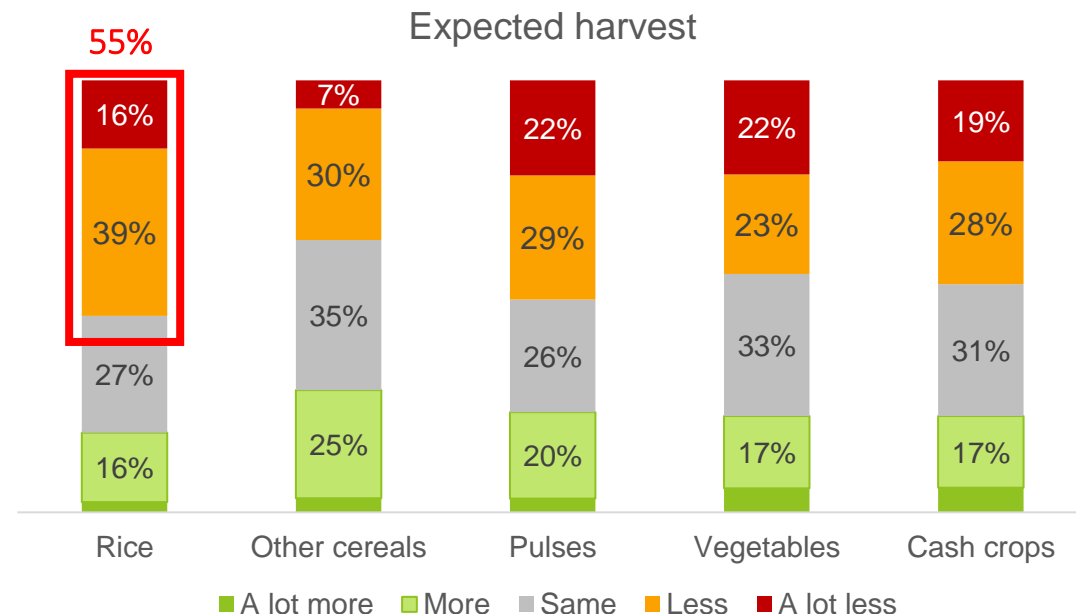
Crop production & marketing

Nearly half of crop farmers expected harvest of main crop to be less or a lot less than normal winter harvest.

- 55% of farmers planting primarily rice expected a drop
- **Association with food security outcomes, and in particular with assets depletion** (crisis and emergency strategies are more frequent among farmers who harvested less): recovering lost assets could have been more difficult

Improvement of marketing conditions since the last round: 29% of farmers reported difficulties, compared to 40% in Aug/Sep

- More common among vegetable farmers and cash-croppers, and among those who reduced the area planted and lower harvest (possibly due to less capital available for investing in marketing).
- "low demand" is much less common, but reports of higher marketing costs and losses/damages increased
- Sale price decreased more frequently for vegetables and cash-crops, but it increased for most HHs producing rice and pulses.





Livestock Production and marketing

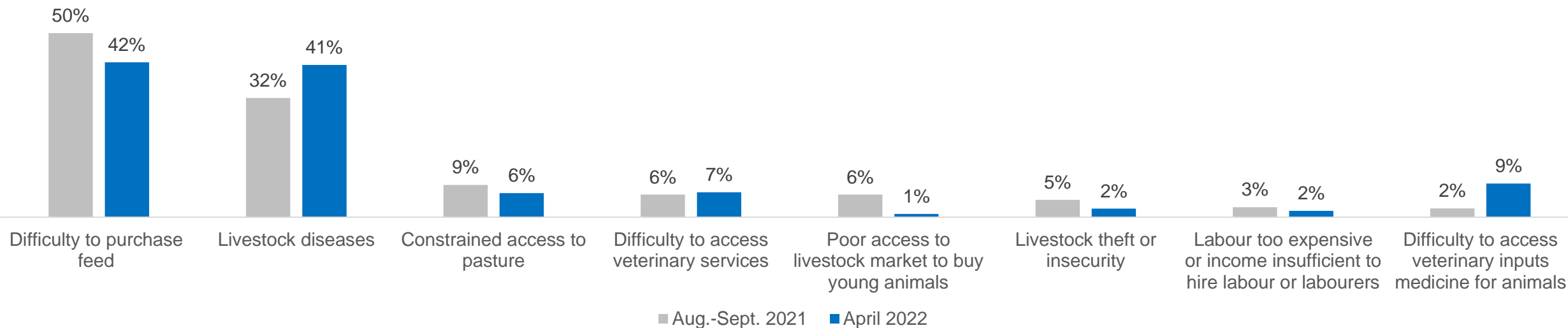
42% of livestock producers report a decrease in herds/flocks compared to one year ago

- Particularly high in Chin (although with a small sample), Rakhine, Mon, and Ayeyarwady.
- The most common **reason for decrease** is animal death (especially for swine, and in particular from the previous round) and distress sale

Access to feed and livestock diseases remained key challenges, with an increase in proportion reporting difficulty in accessing vet inputs

- Difficulties were more frequent among **swine farmers, and in Mandalay**

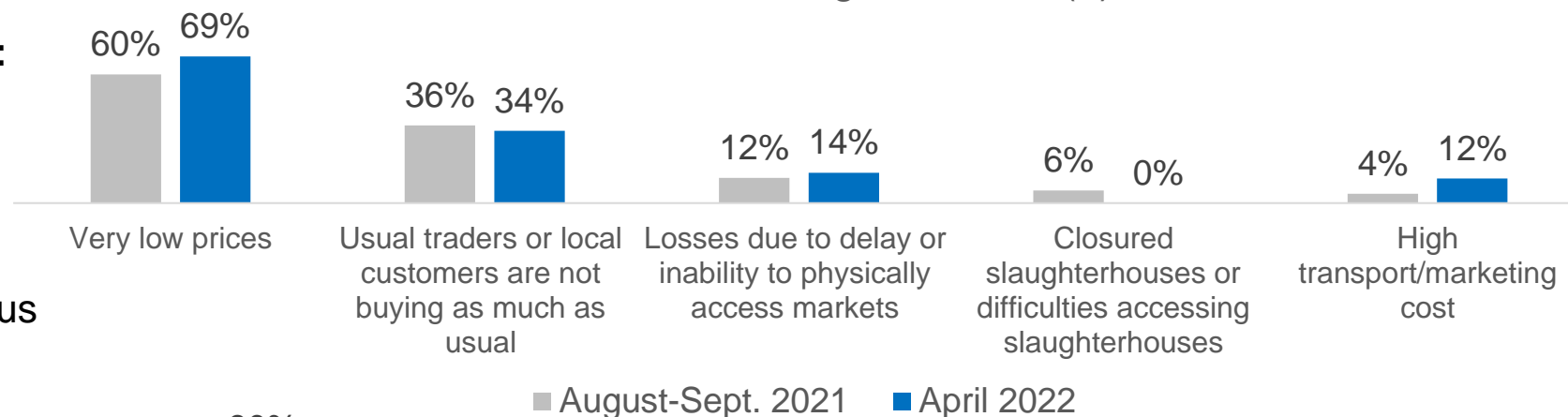
Livestock production difficulties



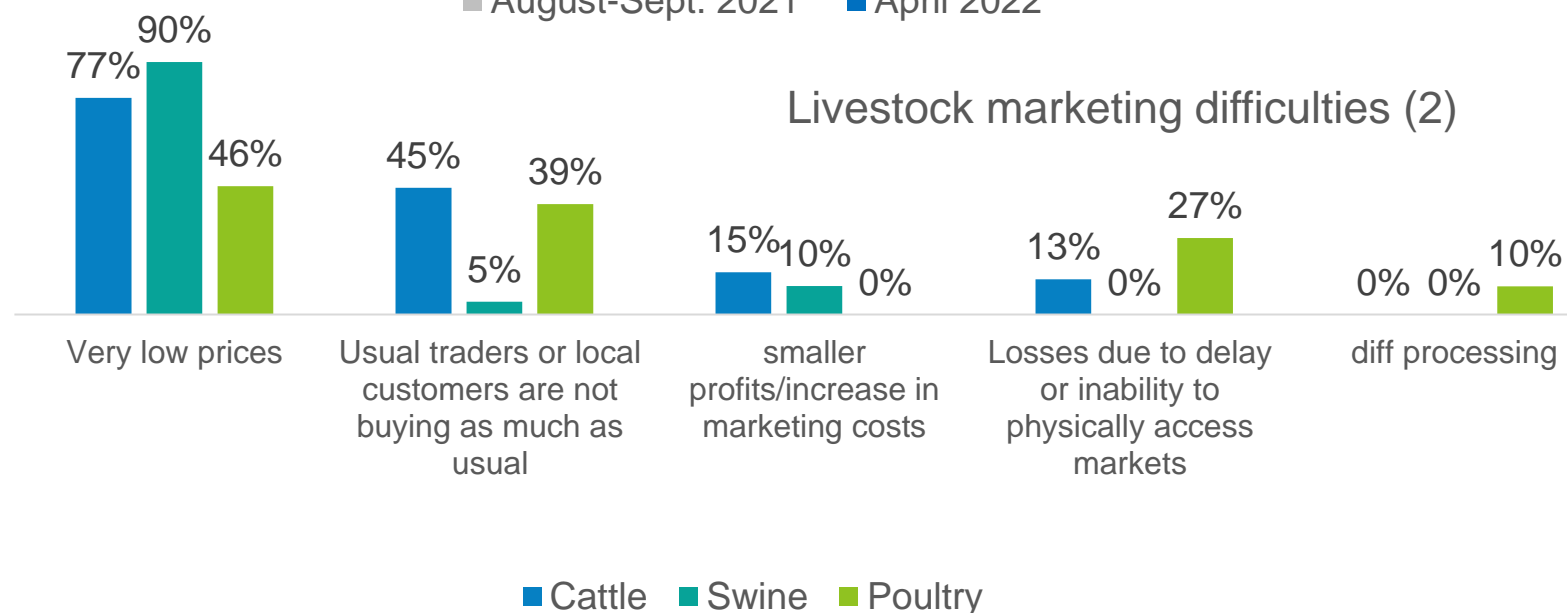
There is no improvement of marketing context: producers still facing low demand and low prices

- **Difficulties in marketing livestock: 55% cattle, 35% swine and 18% poultry.**
- Urban area in 2022 are facing more difficulties in compared to the previous survey round.
- Low output price the most common issue, but also damage/loss due to no accessible market (for poultry), low demand and higher marketing costs.
- Sale price is reported particularly low for cattle

Livestock marketing difficulties (1)



Livestock marketing difficulties (2)





Conclusions

- **Economic shocks** continue to affect most (35%) of the HHs in the surveyed areas, but loss of employment is less frequent than in R2, while the higher food and fuel prices are more prevalent. **Household earning capacity continues to be threatened and purchasing power is deteriorating**
- **Insufficient food consumption and high levels of coping** are associated with multiple shocks and economic stress, but also to poverty conditions.
- **Food insecurity** has improved slightly from last round (from 25% to 20% food insecure), due to seasonal changes affecting food consumption and work opportunities. Further improvements hindered in context of ongoing economic and political challenges. Concern about deterioration as lean season approaches.
- **Agriculture & livestock** production alike facing challenges in terms of rising costs of inputs (fertilizer, feed, veterinary), resulting in reductions in planted area (in particular Rice, 56%), expected harvest (55% Rice) and herd sizes (42%).
- While crop marketing conditions have improved since last round, **livestock marketing is still facing low demand** and marketing is more difficult for the most priced products (cattle).



Recommendations

- Immediate humanitarian assistance to address food consumption gaps and emergency livelihood support for the most affected households, particularly in the most conflict affected areas; for IDPs and communities who have lost access to their livelihoods and/or who do not have access to markets; and households that present key vulnerability characteristics.
- Scale up support to social protection activities for economically vulnerable:
 - cash/vouchers – in this context where, for most people, market remain physically accessible but increasingly financially inaccessible due to deteriorating purchasing power (declining income and rising prices), provision of cash/vouchers is recommended to support household in obtaining nutritious foods (40% reported purchasing less expensive/less preferable foods due to lack of money)
 - Asset creation programmes recommended for those who are depleting assets most severely, including smallholder farmers
- Emergency agriculture support is recommended to recover vital crop and livestock production, to rebuild assets, and to improve access to agricultural inputs. The support of income generating activities and diversification of rural income is recommended to prevent extreme decapitalisation.
- Support the diversification of marketing channels of livestock products