

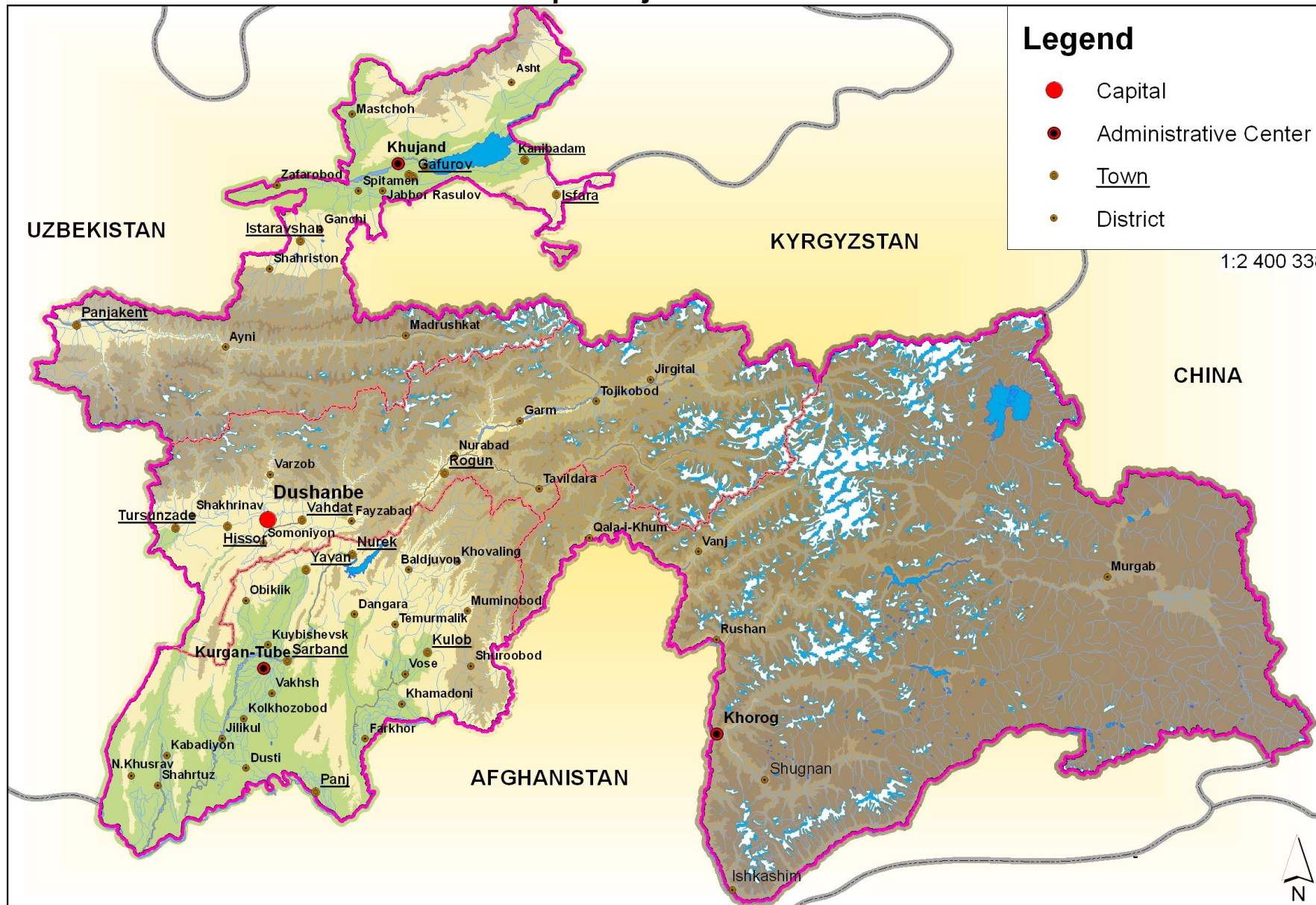
Monitoring & Early Warning in Tajikistan

MONTHLY REPORT

DECEMBER 2012



Map of Tajikistan



GENERAL TRENDS

NATURAL HAZARDS

In December, rain and snow are expected at lower elevations, and snow at higher elevations. Below freezing temperatures can be expected. Avalanches are possible in the mountains.

WEATHER

In December, temperatures will be below long term averages, and precipitation is expected to be above averages in all regions.

ENERGY SECURITY

The electricity production in November increased 11.2% compared to October 2012. Water levels in Nurek are near average for this time of year.

FOOD SECURITY

Historically high flour prices in the main and regional markets and are likely to place pressure on vulnerable families to meet food needs.

HEALTH

For the first 11 months of 2012, the number of reported cases of influenza was 2,545,576, is 15% less when compared to the same period of 2011. Reported acute respiratory infections for the same period totaled 238,911 reported cases, 16% lower compared to the same period of 2011. A decline in prevalence of viral hepatitis A is observed in December.

MIGRATION AND REMITTANCES

Cumulative out migration levels is higher than in 2009 to 2011. Remittances are running at higher levels than for the same periods over the past 10 years. Starting from end of September and up to March next year, the volume of remittances should drop due to the seasonal reduction in work in Russia due to cold weather, and the return of labour migrants.

ECONOMICS.

October 2012 GDP totaled 28,805.8 million Tajik Somoni (6,049 million USD). Consumer price inflation is 6.1%, down from 8.9% last year. Total bank credits as of 1 November 2012 totaled 5.1 billion Tajik Somoni (1,071 million USD). Overdue credits for January to October 2012 totaled 5.3 billion Tajik Somoni (1,113 million USD). Repaid credits totaled 5.0 billion Tajik Somoni (1,050 million USD). The January to October 2012 foreign trade turnover equaled 4,117.8 million USD, 12% more than the same period in 2011. Exports totaled 1,106.2 million USD and imports 3,011.6 million USD.

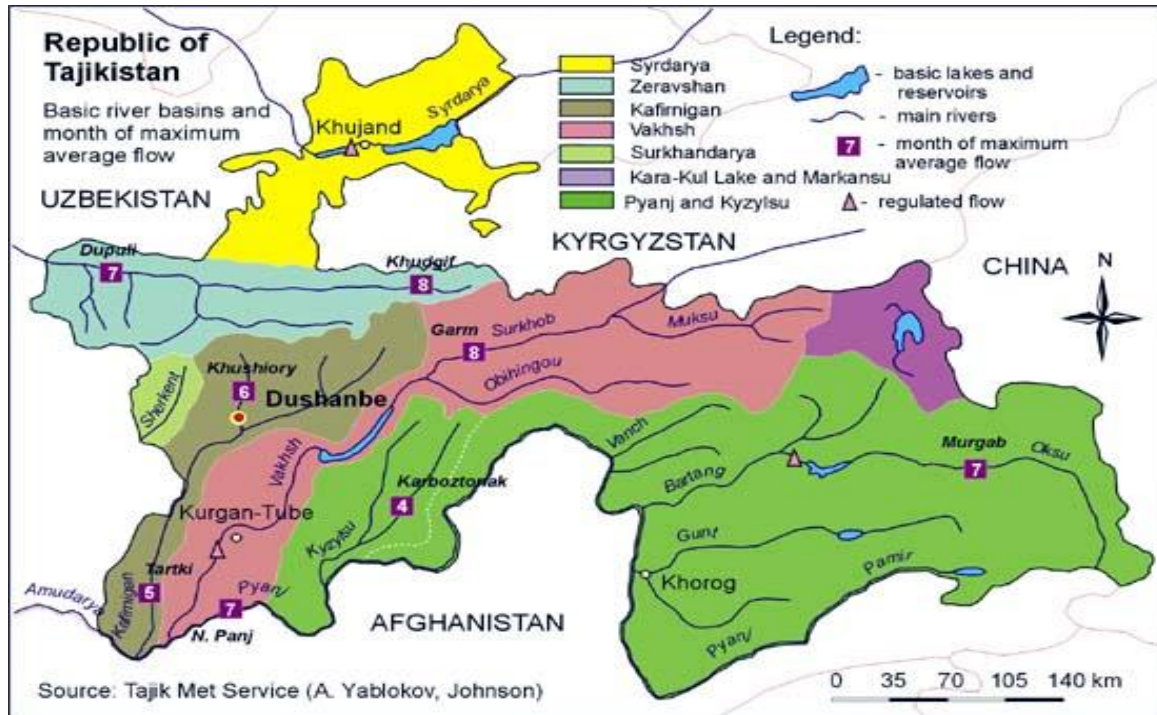
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1. HAZARDOUS EVENTS

1.1. Possible Events in December 2012

The Information Management and Analytical Center (IMAC), Committee of Emergency Situations and Civil Defense (CoES), Government of Tajikistan, reports that according to multi-year observations, the snowfall, frosts and avalanches can lead to emergencies in December.



1.2. Hazard Events in November 2012

CoES reported 1 hazard event in November 2012. On 4 November, strong winds destroyed the roofs of the buildings and trees in Khujand. No casualties are reported. For the latest detailed information see the online disaster overview situation report for November 2012 prepared by UNDP DRMP and CoES at:

<http://untj.org/country-context/coordination-mechanisms/disaster-management/disaster-situation-reports/52-disaster-situation-reports>

2. WEATHER CONDITIONS

2.1. Forecast for December 2012.¹

The Tajik Hydrometeorology Center forecasts average temperatures in November 2012 will be:

- 1 to 2°C below the long-term averages in Khatlon Province, Direct Rule Districts (DRD), and in Gorno Badakhshan Autonomous Oblast (GBAO);
- 1°C below the long-term averages in Sughd Province.

Monthly precipitation is expected to be above the long-term averages, except for GBAO, where the monthly precipitations are expected below or within long-term average. Contact the MEWS at earlywarning.TJ@undp.org for a more detailed forecast for December 2012.

Average Expected Precipitation–December 2012		
Region		Precipitation
Khatlon Province	Lower elevations	18-66 mm
	Foothills	77-92 mm
Sughd Province	Lower elevations	15-18 mm
	Higher elevations	10-22 mm
DRD	Lower elevations	18-66 mm
	Higher elevations	37-72 mm
GBAO	West	26-52 mm
	East	4-12 mm

2.2. Weather Summary for November 2012

November, the weather in the country was relatively warm. Monthly average temperatures in most regions were mainly within the long-term average, but in eastern GBAO, monthly temperatures were 2 to 4°C below the long-term average. Average temperatures were:

- At lower elevations and in the foothills, 4 to 9°C, in the south, up to 11°C
- At higher elevations, 1 to 6°C (in Darvaz 8°C)
- At higher elevations of GBAO – 6 to -9°C.

During the month at lower elevations there were 8 days with precipitation, and for the remaining days the weather was mainly dry and relatively warm. Prevailing temperatures in the first half of the month were at lower elevations in Khatlon, DRD and Sughd were, during the night 3 to 8°C, and during the daytime 20 to 25°C. At higher elevations, night time temperature were -3 to 2°C, and during the day, temperatures ranged from 11 to 16°C. (On some days in Darvaz the temperature was up to 20 to 23°C.) In the second half of the month, temperatures dropped at lower elevations during the night -1 to -6°C, and during the day ranged from 8 to 13°C. At higher elevations, the

Monthly Precipitation	
Regions	% of Average
Sughd Province	140-360 %
Khatlon Province	149-256%
DRD	142-190%,
Western GBAO	49-125%
Eastern GBAO	80-128%

¹ The information in Sections 2.1 and 2.2 is based on reports from the State Agency for Hydrometeorology of Tajikistan.

temperatures at night were -2 to -7°C, and during the day from 0 to 5°C.

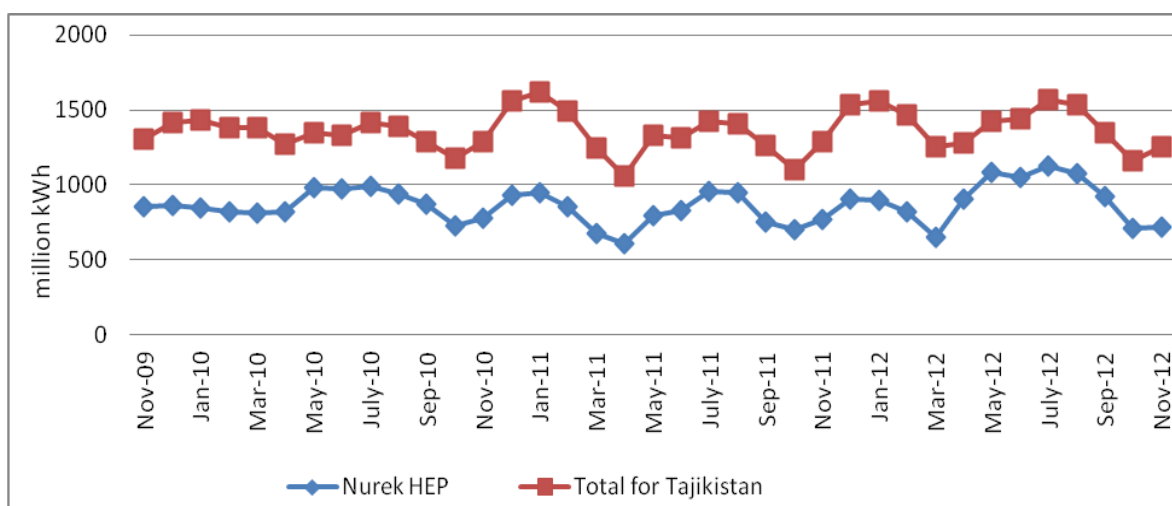
Monthly precipitation in most parts of the country was above or within the long term average. Only in GBAO precipitations were below or within long-term average (see box).

3. ENERGY

3.1. Electricity Production ²

Barki Tojik reported that total electricity generation in November was 1,251 million kilowatt-hours (kWh), or an average of 41.7 million kWh per day. Electricity production in November increased by 11.2% (37.5 million kWh) compared to October 2012. (Contact the MEWS Center at earlywarning.TJ@undp.org for historical data on electricity production). Electricity production in November 2012 was 38 million kWh less than in November 2011 (See **Section 3.5**, below.) Note that from May to November this year, Nurek HEP was providing more electricity than for the same periods in 2010 or 2011.

Total Electricity Production – November 2009 – 2012 (million kWh)

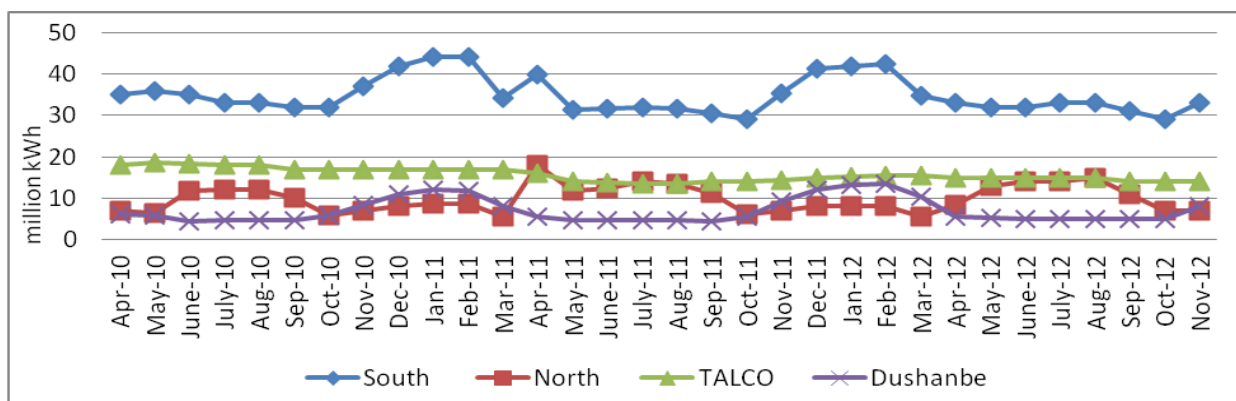


3.2. Electricity Consumption

Average daily consumption of electricity by major regions of Tajikistan and by the Tajik Aluminum Company (TALCO), the largest commercial energy consumer, is indicated in the following table. Total electricity consumption in November was 1,210 million kWh (Contact the MEWS Center at earlywarning.TJ@undp.org for historical data on electricity consumption). In November, 2012 electricity consumption was 79 million kWh less than in November 2011 (1,289 million kWh). In November, 42.0 million kWh of electricity was supplied to Afghanistan. With reduction of water flow in the Vakhsh River and a need to refill Nurek Reservoir for the winter, the rationing of electricity supply began in early October 2012.

² Data on electricity generation and consumption is provided by the Monitoring and Early Warning System (MEWS) GoT expert from Barki Tojik.

Average Daily Electricity Consumption – April 2010 – November 2012 (million kWh)



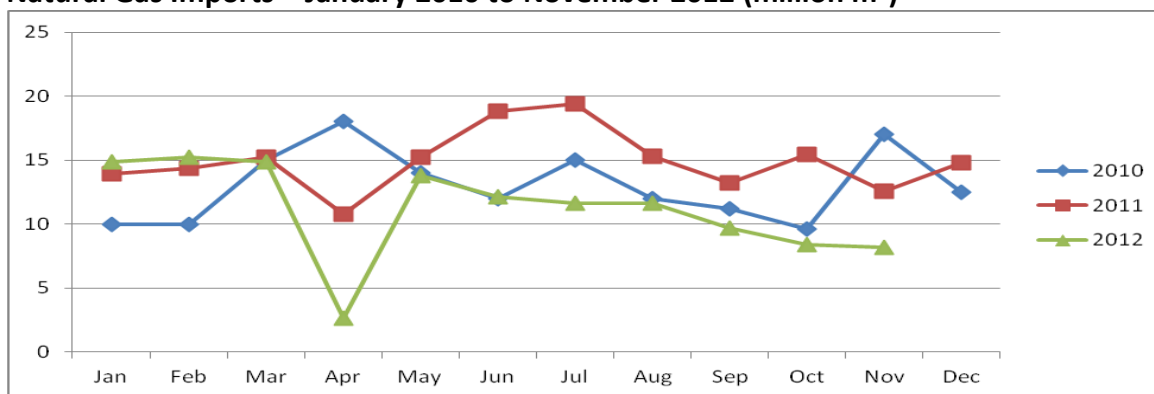
3.3. Natural Gas

Natural gas imports in November were 8.2 million m³, 0.2 million m³ less than in October 2012, and 4.3 million m³ less than for the same period in 2011. For 10 months 2012 gas imports totaled 124.6 million m³, 39.5 million m³ less than for the same period in 2011 (164.1 million m³).

Natural Gas Imports by Tajikistan, 2004 – 2012

Year	2004	2005	2006	2007	2008	2009	2010	2011	To November 2012
million m ³	622.5	629	635	644.7	512.7	216.7	156.3	178.95	124.6

Natural Gas Imports – January 2010 to November 2012 (million m³)



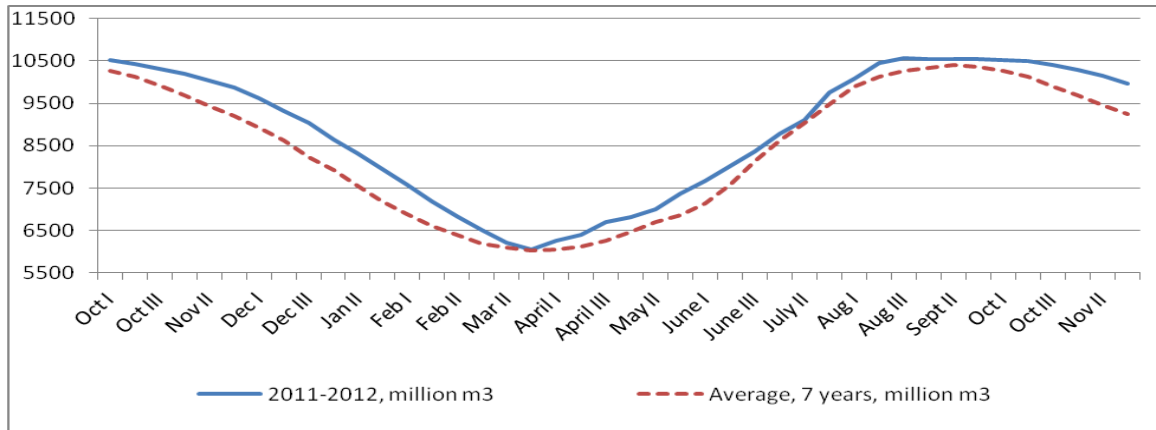
3.4. Coal

According to the Ministry of Energy and Industry, 25,666 tons of coals were produced in November 2012, 31,599 tons less than in October 2012. During the first 11 months of this year more than 397,146 tons of coal were produced in Tajikistan, 174,718 tons more than in the same period of 2011 (222,428 tons). Coal production has increased due to a shift from more expensive natural gas and electricity to more economical coal as the fuel of preference for many uses.

3.5. Nurek HEP Reservoir Levels

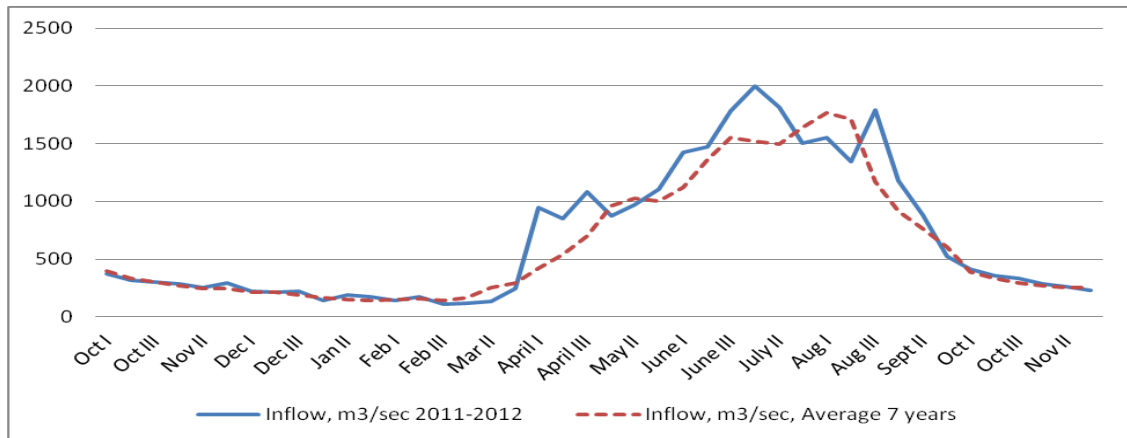
The **Water Volume – Nurek HEP** chart below shows the volume of the water in the Nurek Hydro-Electric Power reservoir at the end of November 2012 compared to average volume over the last seven years (2004 to 2011). In late November the water level in Nurek HEP was 903.88 meters above sea level, 4.7 m lower when compared to October, 2012 and 46.88 m above the “dead level” (857 m)³.

Water Volume – Nurek HEP (million m³)



The **Water Inflow – Nurek HEP** chart below shows water inflows into the Nurek HEP. In the end of November 2012, the water inflow was 232 m³/sec, 18 m³/sec below than the 2004-2011 average of 249.5 m³/sec.

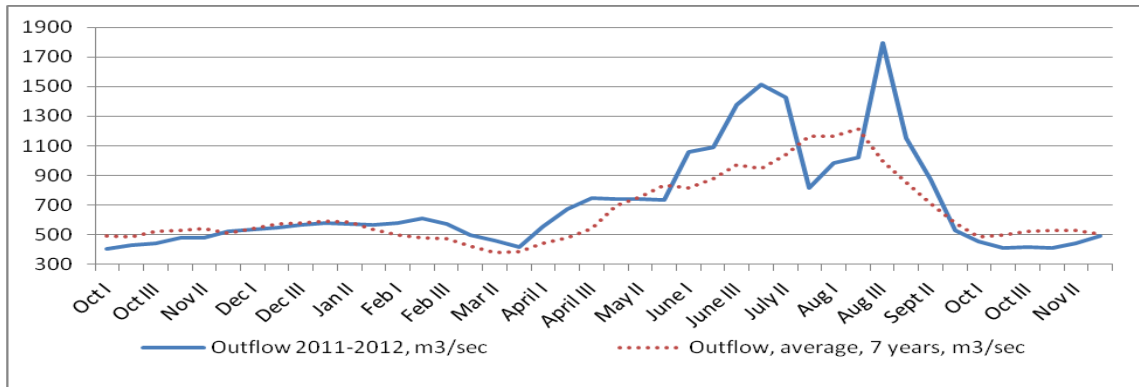
Water Inflow – Nurek HEP (m³/sec)



As indicated in the **Water Outflow – Nurek HEP** chart below, releases from Nurek HEP in the end of November averaged 490 m³/sec, which is less than the seven-year average (501.5 m³/sec).

³ Data obtained from Barki Tojik

Water Outflow – Nurek HEP (m3/sec)



4. FOOD SECURITY

4.1. Summary of Reports

The FewNet **Tajikistan Remote Monitoring Update** for November 2012 notes that:

“Record high September remittances of 308.4 million USD in October, high meat prices indicating high livestock prices, and steady casual labor wages are supporting food consumption and winter food stocking in Tajikistan.”

High wheat and wheat flour prices and lower than usual terms of trade between unskilled labor and imported wheat flour may be limiting the ability of some households to prepare for winter and the lean season. “

“The wet season has had a slow start with most river basins receiving below average rains from October 1 to November 20. Early wet season rains support land preparation and sowing for winter crops such as winter wheat and barley to be harvested from May to July 2013.”

A copy of the report can be found at

http://www.fews.net/docs/Publications/tj_profile_2012_11_en.pdf

The October Famine Early Warning System Network (FewsNet) PRICE WATCH: October Food Prices, reports: “In Tajikistan, locally produced and imported wheat grain and flour prices continued to increase countrywide between September and October, reflecting high import price from Kazakhstan and high transportation costs. On average, the prices of locally-produced, second-grade wheat flour increased by 19 percent and wheat grain prices increased by six percent. Wheat flour prices increased by 21 percent in Khorog in October following recent periods of civil insecurity. In Kurgan-Tyube, locally produced wheat grain and flour prices increased by 20 and 29 percent, respectively. Wheat grain prices were comparable to their 2011 level in October, although wheat flour prices posted, on average, 18 percent price increases since last year due to high import prices. Rice prices and vegetable and cotton oil were stable on all markets due to generally adequate local and imported supplies with exception of Dushanbe, where imports of these commodities have been insufficient. Potato prices continued to decreased seasonally throughout Tajikistan between September and October as supplies from the domestic harvest continue to enter the market.”

“Outlook. In Tajikistan, the prices for wheat and wheat flour will continue to increase, as expected due to high prices in Kazakhstan, and growth of demand, as domestic stocks will be depleted, and population will be forced to go to the market to replenish the stocks.”

The Ministry of Agriculture reports that according to the forecast for the fall, 2012, the expected planted area during the fall season was expected to be 197,021 hectares. As of 3 December 2012, a total area of 155,524 hectares (78,9 %) had been planted, 21,825 Ha more than last year (133,627 Ha).

The cereal crops are expected to be planted on 186,699 Ha. By 3 December 2012, 147,230 Ha are reported to have been planted (78,9 % of forecast), 20,328 Ha more than for the same period of the last year (126,902 Ha). The wheat plantings covered 140,979 ha, 96 % of all planted areas.

According to estimates, for the first 11 months 2012, stocks of coarse fodder for animals available in Tajikistan were 1,186,500 tons, and the stocks of higher quality fodder were 88,5000, respectively 204,082 and 4,775 tons more when compared to the similar period of the last year.

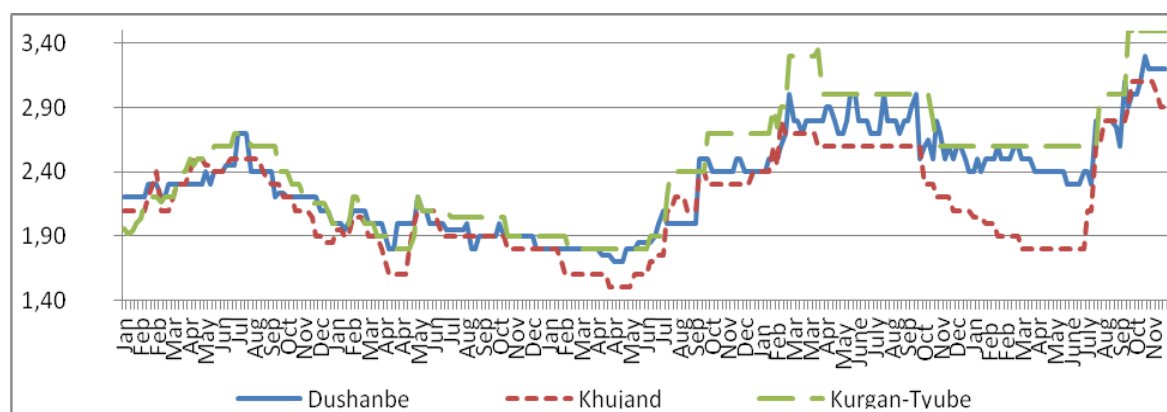
Based on Government instructions, a doubling the hay stocks for winter period, a total of 217.900 tons of hay have been stocked, 2.2 times more than for the same period of last year.

4.2. Cereal prices ⁴

1st Grade Wheat Flour

The chart below shows prices for 1st grade wheat flour in Dushanbe, Khujand, and Kurgan-Tyube from January 2008 to late November 2012. Wheat prices dropped slightly in Khujand and were stable, but at high levels in Dushanbe and Kurgan-Tyube. Prices are above or close to the highest levels since 2009.

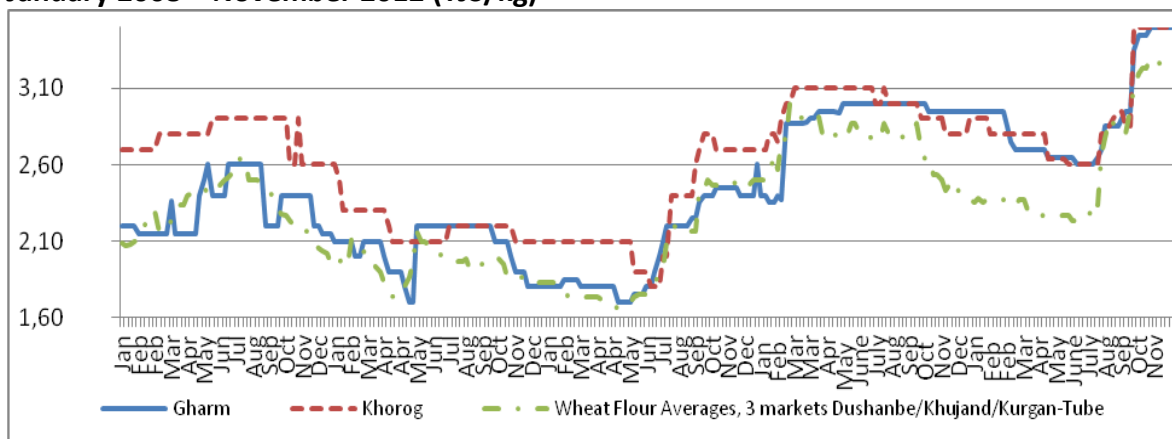
1st Grade Wheat Flour Price in Three Main Markets, January 2008 – November 2012 (TJS/kg)



The chart below provides prices for 1st grade wheat flour in two large regional markets, Gharm and Khorog, and the average price for Dushanbe, Khujand and Kurgan-Tyube. In November, wheat flour prices in Gharm and Khorog were the stable (and high in historical terms).

⁴ Food and fuel prices are from WFP Food Security Weekly Market Monitoring, Tajikistan
http://untj.org/country_context/coordination_mechanisms/agriculture&food_security/fsms/

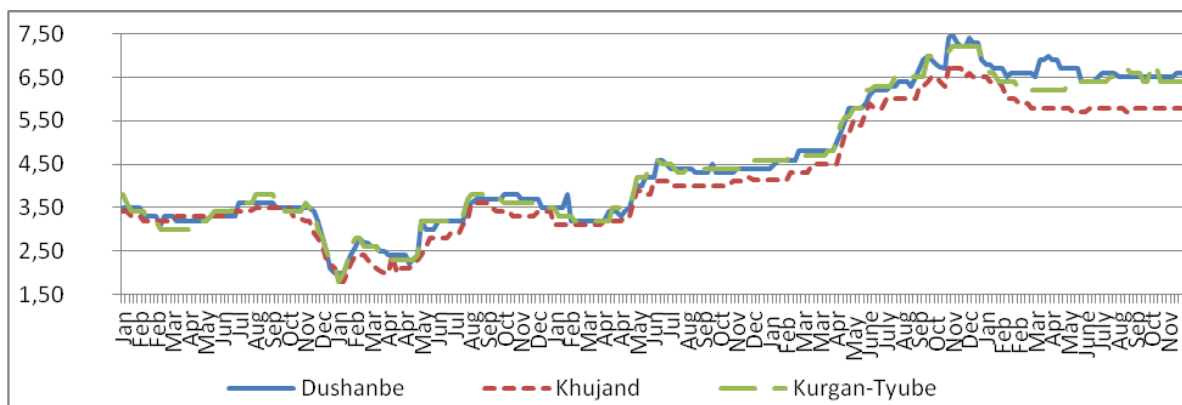
1st Grade Wheat Flour Prices in Garm, Khorog, and average of Three Main Markets, January 2008 – November 2012 (TJS/kg)



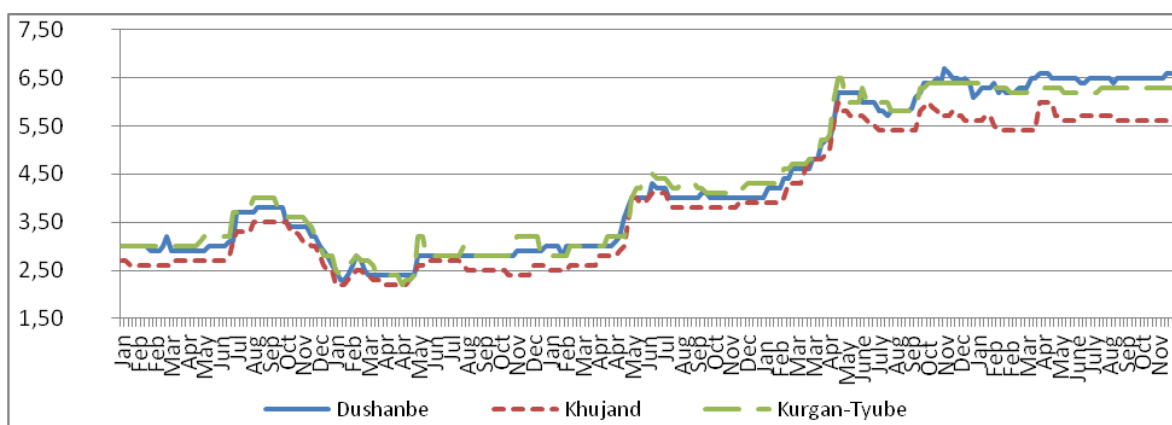
4.3. Fuel prices

During November, petrol and fuel prices increased slightly in Dushanbe and remained unchanged in Kurgan-Tybe and Khujand markets, compared to the previous month. A expected reduction in export tariffs for fuel from Russia reported to take effect in 2013.⁵

Petrol Prices in Three Main Markets, January 2008 – November 2012 (TJS/liter)



Diesel Prices in Three Main Markets, January 2008 – November 2012 (TJS/liter)



⁵ See <http://news.tj/en/news/russia-expected-deliver-one-mln-tons-oil-products-tajikistan-free-tax-next-year>

5. HEALTH

According to Ministry of Health, for the first 11 months of 2012, the number of reported cases of influenza was 2,545,577, 15% less compared to the same period of 2011 (300,685). Acute respiratory infections during this period were 238,911 reported cases, 16% less compared to the same period of 2011 (282,939 cases). During this period 9,682 cases of hepatitis A were registered, 8% less compared to the same period of 2011 (10,490 cases). The decline in prevalence of viral hepatitis A is normally observed in December

Comparative Epidemiological Report – January to November 2011- 2012			
Disease	January- December 2011	1st 11 months 2012	Difference (-,+)
Typhoid	409	257	-119
Acute Intestinal Infections	65,983	57,396	-12,406
Viral Hepatitis	11,068	10,433	1,048
Brucellosis	991	803	-144
Anthrax	36	29	-6
Crimean–Congo hemorrhagic fever (CCHF)	15	9	-6
Acute Respiratory Infections	292,939	238,911	-44,762
Influenza	17,746	15,646	-1,115
Pneumonia	7,579	6,586	-1,062
Bites, Stings	14,749	14,896	+141

Despite the low level of droplet infections, the respiratory diseases season has started and includes acute respiratory diseases, acute respiratory viral infection, influenza, and pneumonia. The specialists from State Epidemiological Surveillance Service and Research Institute of Preventive Medicine at Ministry of Health, undertake epidemiological surveillance to identify of the types of influenza virus, and diseases similar to influenza, emerging in the country. Regional centers are collecting and sending samples to virology laboratories countrywide .

As a whole, the situation with the above mentioned diseases is assessed as stable, with a declining trend for seasonal influenza. At the same time, the outbreaks of these diseases can be expected by the end of a year. In order to prevent the above mentioned diseases, it is necessary to observe elementary rules such as physical training, personal hygiene (washing hands), walking in fresh air, drinking boiled water, washing fruits and vegetables, and eating dairy products.

Currently there is sufficient number of developed, published and disseminated leaflets, posters, brochures, banners among population on prevention of food poisonings (botulism) and poisonings with mushrooms, pesticides and mineral fertilizers, canned home-made products, and of literature on safe technology of food production.

6. ECONOMIC TRENDS

6.1. General Trends

Gross Domestic Product (GDP) in October 2012 continued to increase; for the first ten months of 2012 GDP totaled 28,805.8 million Tajik Somoni (6,049 million USD) an increase of 7.5% compared to 7.4% for the same period of 2011.

For the first 10 of months 2012, industrial production totaled 7,778.5 million Tajik Somoni (1,633.4 million USD), an increase of 9.9% compared to the same period in 2011. The increase of industrial production is linked with the recovery of demand in both domestic and foreign markets, and has had a positive impact on all economical activities.

GDP from agriculture for the first ten of months of 2012, compared with the same period of 2011, increased by 10.2% and totaled 13,625.7 million Tajik Somoni (2,861.3 million USD), including crop production: 10,236.1 million Tajik Somoni (2,149.5 million USD) or 11.2%, and livestock, 3,389.6 million Tajik Somoni (711.8 million USD) or 7.3%.

There was a decline in investment activity. During 10 months of 2012 the value of investments from all sources was 3,163.3 million Somoni (664.3 million USD), 73.8% of the same period of 2011. Most investments (51.7%) were in the state sector. The private sector accounted for 22.6%, while joint ventures accounted for 8%, and foreign ownership for 17.7%. The share of investments for the construction of energy facilities was 77.6% when compared to the same period of 2011.

Consumer price inflation for the first 10 months of 2012 was 6.1%, compared to 8.9% for the same period last year. Average monthly growth in inflation was at the rate of 0.6% compared to 0.9% last year. Thus, the pressure of inflation in current year was moderate, and growth of inflation is one half the rate of last year.

The main factor contributing to inflation was services; the tariffs for services grew, compared to December 2011, by 13.6%. The price of non-food-items increased by 4.5%, and prices for food items increased by 5.7%. The share of food items in the consumption basket of population was more than 60%. By comparison, during 10 months of 2012, inflation in the consumption sector was, in Russia, 5.7%, in Kazakhstan, 4.6% and in Kyrgyzstan, 5%.

Ministry of Finance data for the first 9 months 2012 indicates that the Government budget totaled 6,692.4 million Tajik Somoni (1,405.4 million USD) or 26.9% of GDP. Direct tax income was 78% of these total, non-tax revenues 7%, with the remaining 15% from investments, included in the public budget. Government expenses for January-September 2012 totaled 6,074.5 million Tajik Somoni (1,275.7 million USD), an increase of 274.6 million Tajik Somoni (57.7 million USD) when compared to the same period of 2011.

The total value of bank credits as of 1 November 2012 was 5.1 billion Tajik Somoni (US\$ 1,071 million) 10.3% more than in the same period in 2011. Overdue credits totaled 5.3 billion Tajik Somoni (1,113 million USD), 1.5% more than the same period of 2011. Repaid credits totaled 5 billion Tajik Somoni (1,050 million USD), 93.7% of total volume of extended credits for this period.

Expansion of microcrediting all over the country, especially to remote mountaineous regions, remains a priority and the banking system allocates all facilities to these ends. In January to October, 2012 the microcredits totaled 2.5 billion Tajik Somoni (525 million

USD), 27.3 % more compared to the same period of the last year. In the remote mountain regions, 524.2 million Tajik Somoni (4,100 million USD) in microcredit has been extended this year, 21.1% more when compared to the same period last year.

For January to October 2012, foreign trade turnover equaled 4,117.8 million USD, 12% more than in the same period in 2011. Exports totaled 1,106.2 million USD and imports 3,011.6 billion USD. The trade balance remains negative, and for January to September totaled 1,905.4 million USD (in October the increase was 338.7 million USD), 21.6% higher than in the same period in 2011 (1,566.7 million USD).

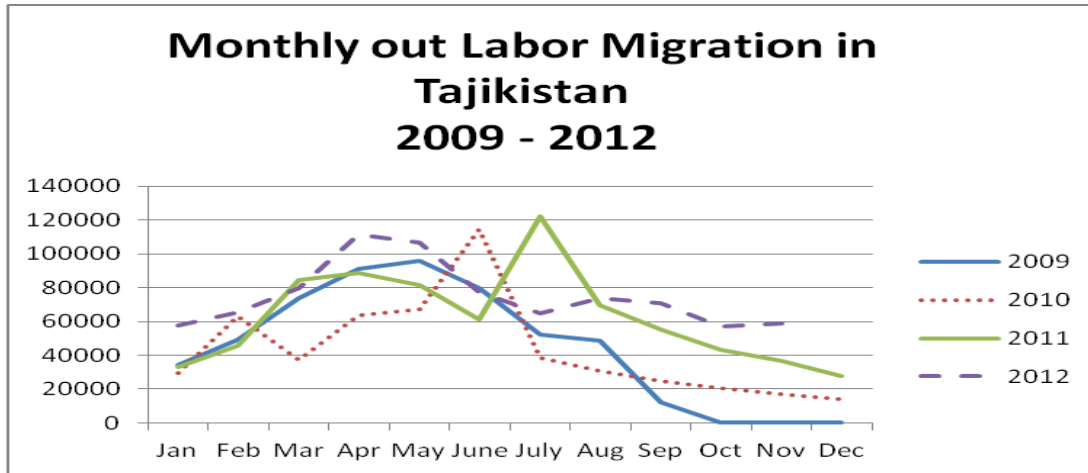
6.2. Labor Migration

The Migration Service of Tajikistan reports that for the first 11 months of 2012 a total of 823,866 persons left Tajikistan and 575,457 persons returned.

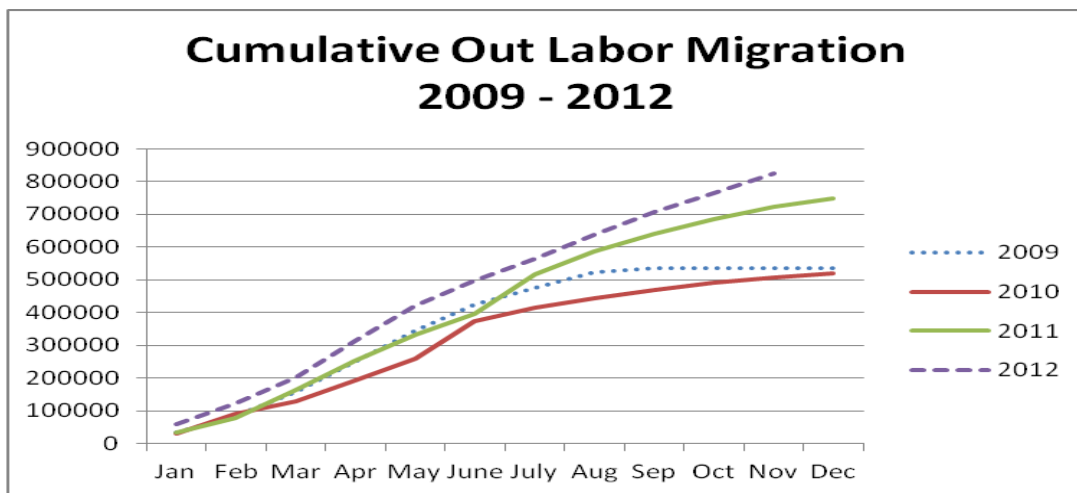
Out Labor Migration From Tajikistan – January to November 2012 (Persons) (“-“ indicates no data)						
Point of Departure	Departed					
	Total	By plane	By train	By car	Gender	
					Male	Female
Dushanbe and DRD	489,877	433,378	56,499	-	429,771	60,106
Sughd Oblast	243,046	208,610	16,976	17,460	204,952	38,094
Khatlon Oblast	75,814	74,822	-	992	69,916	5,898
GBAO	4,058	-	-	4,058	3,062	996
Dusti Border Pint, Tursunzade	11,071	-	-	11,071	3,565	7,506
Total	823,866	716,810	73,475	33,581	711,266	112,600

Labor Migration To Tajikistan - January to October 2012 (Persons) (“-“ indicates no data)						
Point of Return	Returned					
	Total	By plane	By train	By car	Gender	
					Male	Female
Dushanbe and DRD	365,268	324,944	40,324	-	315,620	49,648
Sughd Oblast	130,415	119,458	-	10,957	105,376	25,039
Khatlon Oblast	66,437	65,888	-	549	60,580	5,857
GBAO	3,640	-	-	3,640	2,661	979
Dusti Border Pint, Tursunzade	9,697	-	-	9,697	3,258	6,439
Total	575,457	510,290	40,324	24,843	487,495	87,962

The **Monthly Out Labor Migration 2009 – 2012** chart below provides a year-to-year summary of annual out migration numbers from 2009 to 2012.



The chart **Cumulative Out Labor Migration 2009-2012**, below, indicates that total out migration in 2012 has been occurring at a rate above the past 3 years.



6.3. Employment

According to the State Agency of Social Protection, Employment and Migration, for the first 11 months of 2012, 98,242 Tajik citizens applied to the Agency for assistance. Of this number, 59,133 individuals registered as seeking employment, and 39,431 were officially registered as unemployed. For the same period, the Employment Centers provided 32,767 individuals with the new jobs, or 33.3% of those who applied. In addition, 2,330 vulnerable individuals in the labor market were provided with the jobs through a system of reserved positions. The main reasons of the low number of employed individuals is that a majority of unemployed do not have specific technical skills or have lost skills due to long interruptions in work, and also low salaries.

For the first 11 months of 2012, 6,228 unemployed individuals received unemployment benefits totaling 1,617,583 Somoni. According to the State Agency of Social Protection, Employment and Migration, as of 1 December 2012 the total number of individuals

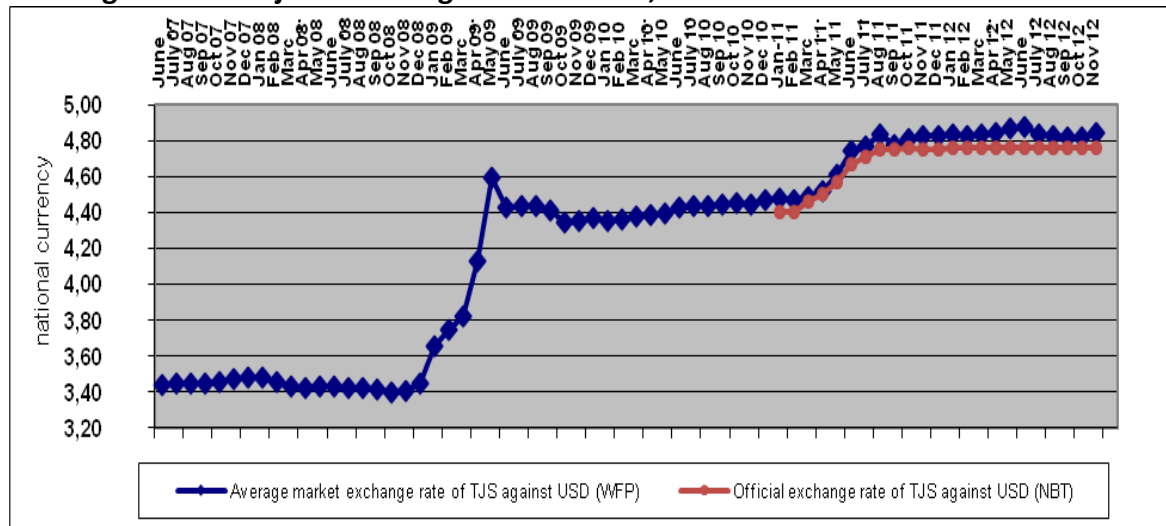
seeking employment was 76,000, including those from 2011. Of this number, 54,600 individuals have status as unemployed. For 11 months of 2012, 12,377 individuals were sent for vocational training, and 4,575 individuals were employed in state-funded public works.

Information available to the State Agency of Social Protection, Employment and Migration indicates a total of 127,371 new jobs were created in the first 11 months of this year, 7% more than in the first 11 months of 2012 (119,154).

6.4. Exchange Rate

The chart below provides both the official National Bank of Tajikistan's (NBT) exchange rate and unofficial (market) exchange rate monitored weekly by WFP. The NBT rate as of 1 December 2012 was 4.76 Tajik Somoni to one USD. The WFP reported an average market exchange rate for five markets in Tajikistan on 1 December 2012 was 4.84 Tajik Somoni per one USD.

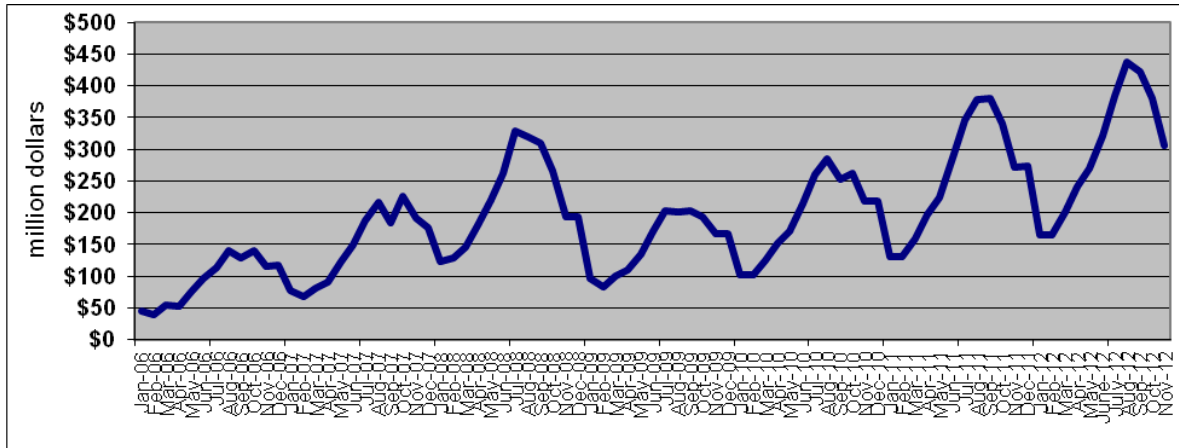
Exchange Rate of Tajik Somoni against US Dollar, June 2007 – November 2012



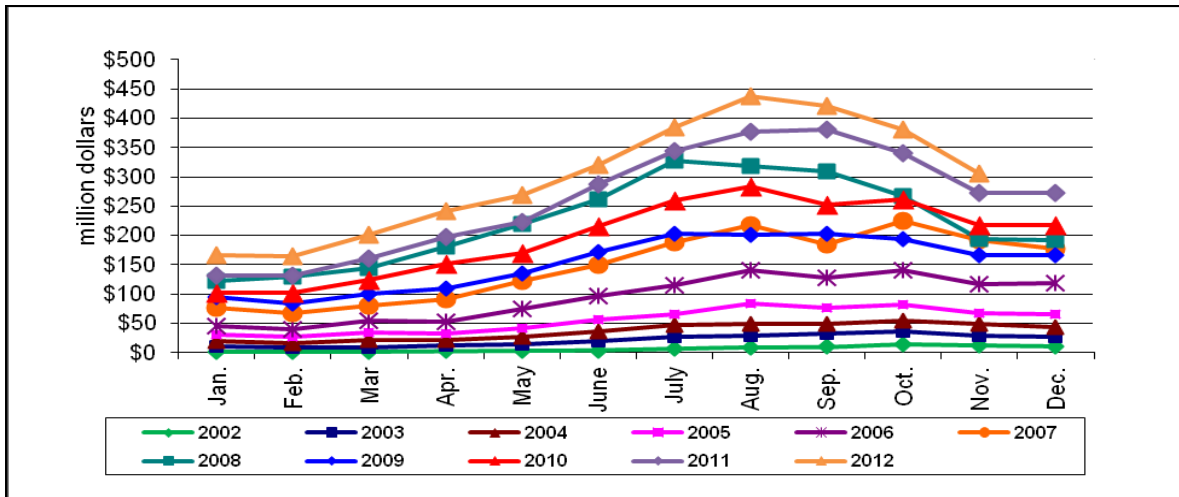
6.5. Remittances

Unofficially reported remittances in November totaled 305.6 million USD, 11% higher than for the same period in 2011. Remittances are running at a higher rate than previous years 10 years, consistent with an increase in out-migration. Historical trends indicate that, from the end of September to the March next year, the volume of remittances will be reduce compared to the May-August period. The drop is caused by a seasonal reduction in work in Russia due to cold weather, and many migrants returning home.

Monthly Remittances, January 2006 to November 2012 (million USD)



Remittances in Tajikistan, January 2002 to November 2012 (million USD)



The aim of the Tajikistan Monthly Monitoring and Early Warning (MEWS) Reports is to provide regular information and succinct analysis on the evolution of natural, economic, food-related, energy-related and other risk factors in Tajikistan. Data and information in this report are provided by different sources and compiled by the MEW System GoT Group of Experts and UN Agencies in Tajikistan. The United Nations Development Program in Tajikistan and Monitoring and Early Warning Center at MEDT are not responsible for the quality or accuracy of the data provided by external sources or the analysis contained in this report.

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