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NATIONAL STRATEGIC
REVIEW
OF FOOD SECURITY AND
NUTRITION IN ARMENIA

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ABBREVIATIONS

ADS	Armenia Development Strategy 2014-2025
AMD	Armenian Dram
CRRC	Caucasus Research Resource Center
CFSVNA	Comprehensive Food Security, Vulnerability and Nutrition Analysis
DHS	Demographic and Health Survey
FAO	Food and Agriculture Organization
FDI	Foreign Direct Investments
FLSEB	Family Living Standards Enhancement Benefits Program
GDP	Gross Domestic Product
GFC	Global Financial Crisis
Ha	Hectare
IFPRI	International Food Policy Research Institute
ILCS	Integrated Living Conditions Survey
Kcal	Kilocalorie
MDGs	Millennium Development Goals
MOH	Ministry of Health
MTEF	Medium Term Expenditure Framework
NGO	Non-Governmental organization
NSR	National Strategic Review
NSS RA	National Statistical Service of the Republic of Armenia
PPP	Purchasing Power Parity
RA	Republic of Armenia
SDGs	Sustainable Development Goals
SFP	School Feeding Programme
SME	Small-Medium Enterprise
UN	United Nations
UNDAF	United Nations Development Assistance Framework
UNDP	United Nations Development Programme
UNICEF	United Nations Children's Fund
UNIDO	United Nations Industrial Development Organization
WFP	World Food Programme
WHO	World Health Organization

EXECUTIVE SUMMARY

SDG2 is one of the cornerstones of the 2030 Agenda. Improved food security and nutrition is a foundation for progress in health, education, employment, women's empowerment, poverty and inequality reduction. As a signatory to the Sustainable Development Goals, Armenia marked its commitment to these ambitious goals, and the National Strategic Review (NSR) of Food Security and Nutrition in Armenia attempts to provide a comprehensive assessment of the current state of food security and nutrition in the country, revealing the underlying factors and key challenges, examining the policies and programmes being implemented and suggesting the necessary government actions required within the framework of the SDG2. The overarching goal of the NSR is to support and guide the Government and relevant stakeholders towards SDG2 fulfilment by 2030. The Review process was carried out under Government stewardship with the close collaboration of stakeholders from the international community and Armenian civil society. The Government of Armenia established an intergovernmental committee on the SDGs under which the Social Subcommittee covering SDGs 1, 2, 3 and 17 was formed. The Social Subcommittee formed an SDG2 Steering Committee chaired by Mr. Armen Harutyunyan, Deputy Minister of Agriculture. With the support of Dr. Armen Yeghiazaryan, Chairman of the National Centre for the Regulation of Legislation and the United Nations World Food Programme, AVAG Solutions provided research support and strategic analysis for the deliberation of the Committee, resulting in this comprehensive report validated by the SDG2 Steering Committee.

The Government-led strategic review process focused on the i) analysis of the food security and nutrition situation and trends in Armenia and identification of the main challenges; ii) analysis of the national response; iii) identification of gaps in ensuring food and nutrition security; iv) elaboration of recommendations that will be required to meet the response gaps and accelerate progress towards the SDG 2 achievement; and v) support nationalization of the SDG 2. The NSR report was developed through an interactive and consultative process during which the draft national framework on the SDG 2 “End hunger, achieve food security and improved nutrition and promote sustainable agriculture” was elaborated. The food security situation and trends are analyzed based on the SDG 2 draft national framework. Taking into account that, on January 1, 2016 the 2030 Agenda already entered into force, 2015 has been taken as the baseline year for the situation analysis of the SDG 2 indicators. Four pillars that comprehensively define food security are taken as a base for analyzing the food security situation and identifying challenges and gaps that need to be addressed to achieve SDG2. These four pillars, contextualized below, are: food availability, access, utilization and stability.

Food Availability: Armenia's relatively strong agricultural performance since 2001 has resulted in a substantial increase in self-sufficiency levels of main food products and overall food availability. The average dietary energy supply indicator has increased by nearly 30 percent since 2000, comprised of nearly 2,900 kcal/capita/day in 2015 and approaching the Food and Agriculture Organization's (FAO) maximum dietary energy requirement level (3,217 kcal/ person/day). About 66 percent of the total dietary energy per person available for consumption comes from domestic production. However, the availability of food in Armenia highly depends on food imports, especially with regard to cereals and certain types of meat. Meanwhile, these products provide more than half of the available dietary energy in Armenia. The country still imports 50.5 percent of the supplied wheat, 42 percent of legumes, 78

percent of poultry, 42 percent of pork, and 92 percent of vegetable oil. This reflects the vulnerability of the country's population to foreign food markets and food price fluctuations.

Food Access: Armenia's economic growth, and growth in food availability and dietary energy supply, have led to a decline in the prevalence of undernourishment. The prevalence of undernourishment has dropped nearly four times between 2000 and 2016. Nevertheless, nearly 6 percent of the Armenian population (approximately 180,000 people) consume an inadequate amount of calories needed to maintain an active and healthy lifestyle and are undernourished. About 16 percent of households (approximately 480,000 people) are food insecure. There are significant differences between the availability of food and the actual food consumption of the population. The average Armenian consumes about 2,420 kcal of dietary energy per day, which is higher than the minimum dietary energy requirement in Armenia (1,886 kcal / day). However, about half (47 percent) of the actual food consumption pattern of an average Armenian consists of staples, which are mainly bakery products and potatoes. Vegetables and fruits consist of one third of the pattern while protein-rich meat, fish and eggs consist of 9 percent. Despite the growth in incomes and in food availability between 2008-2015, the food consumption pattern of an average Armenian did not show any significant diversification or increase in consumption of more nutritious food items. This shows the limited financial accessibility of nutritious foods for most of the population and the lack of healthy nutritional habits and lifestyle.

Food utilization: Utilization is closely linked to nutritional indicators, especially among children aged 0-5. The last ten malnutrition indicators among 0-5 years old children have indicated some improvements, but there is a double burden of child malnutrition in the country in terms of concurrent presence of stunting and overweight. The exclusive breastfeeding rate for children up to 6 months has improved since 2010 and has approached the target value set by the World Health Organization (WHO) for 2025. The same trend is observed for the prevalence of anaemia: the prevalence of anaemia among women of reproductive age has dropped by 38 percent and by 51 percent among children under five years of age between 2005-2015. In terms of these indicators, Armenia has approached the target values set by the WHO for 2025.

Food stability: Stability characterizes the ability of households to maintain their food security over time and stability of the three aforementioned pillars. Hence, it refers to the vulnerability of households related to food security risks, mainly caused by the external natural, economic and political disturbances and shocks.¹ The NSR found that despite agricultural production growth and self-sufficiency in several food

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