



GREATER HORN OF AFRICA (GHA) FOOD SECURITY BULLETIN

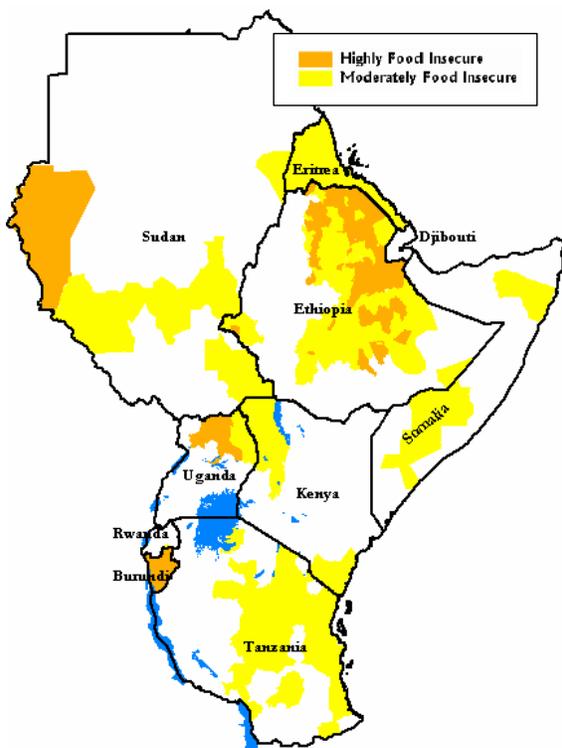
REGIONAL OVERVIEW – IMPROVED CROP AND LIVESTOCK PRODUCTION BUT CONCERNS OVER CHRONIC VULNERABILITY

The major annual harvests are now nearing completion across the Greater Horn of Africa. The crop has already been harvested in the south of the region, harvesting is ongoing in the equatorial regions and is approaching maturity in the northern areas. Immediate humanitarian efforts now concentrate on meeting the peak relief needs in the pre-harvest period in the northern areas. Simultaneously attention is turning to assessing emergency needs in the coming year. Areas of current priority concern are shown in Figure 1 below.

In the northern tier Countries large-scale relief operations continue. With the exception of Sudan, the appeals are well resourced for the remainder of 2003.

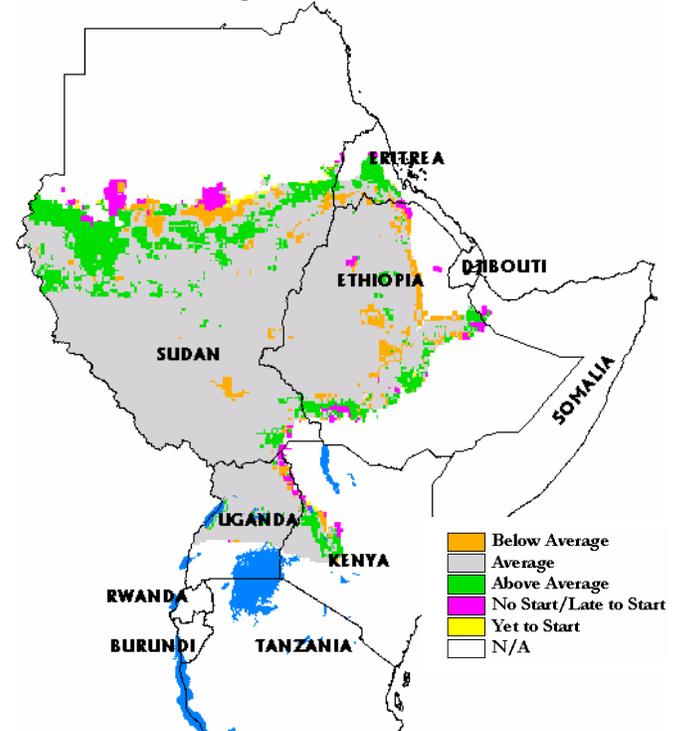
There are encouraging signs of improving crop and livestock conditions across much of *Ethiopia*, *Eritrea* and *Sudan* due to improved rainfall performance in August. There are areas of concern over crop performance in parts of the central/eastern Ethiopia highlands, due to a significant rainfall deficit, and parts of western Eritrea, where there was a delayed onset of the rains. Most of the crop is now approaching maturity and assuming normal rains for the remainder of the season, average to above average yields are forecast by satellite based monitoring, used in conjunction with crop models (see Figure 2). While crop forecasts are not yet available, production is certain to be much better than last year. However, despite this, food insecurity is expected to persist in the northern tier Countries in 2004 (see following stories).

**Figure 1 Food Insecurity in the Greater Horn of Africa
August 2003** Source: FEWS NET



Following generally good rains, overall food security conditions in the region are currently improving. However, serious pockets of concern remain. Against the general trend a below average 2002/03 crop in *Tanzania* has led to the Government identifying nearly 2 million people requiring livelihood support. An appeal from WFP is expected shortly. Fighting in *Burundi*, which occurred around the harvest period, has left an estimated 12% of the population in need of food aid. In neighboring *Rwanda*, while food security is generally fair, drought in the Bugesera region has left an estimated 45,000 requiring food assistance. In *Kenya*, again while the general conditions have improved, recent assessments have identified pocket areas of concern in the coastal and north rift areas. In *Uganda*, conditions have improved in the pastoral Karamoja region following good rains. However, serious conflict continues to undermine food security in parts of northern Uganda.

**Figure 2 Projected Sorghum Conditions based on WRSI
20th August**, Source: USGS/FEWS NET



Forage conditions are also much better than last year across the region and in the normal to above normal range. However, potential problem areas include a spot northwest of Dire Dawa in Ethiopia and around the southern Kenya – northern Tanzania border. Multi-year drought in the Sool/Sanaag plateau in *Somalia* (not shown on Figure 3) has resulted in insufficient pasture and an estimated 3,500 households require assistance.



ERITREA: RELIEF OPERATION CONTINUE – 2004 NEEDS TO BE ASSESSED FROM SEPTEMBER

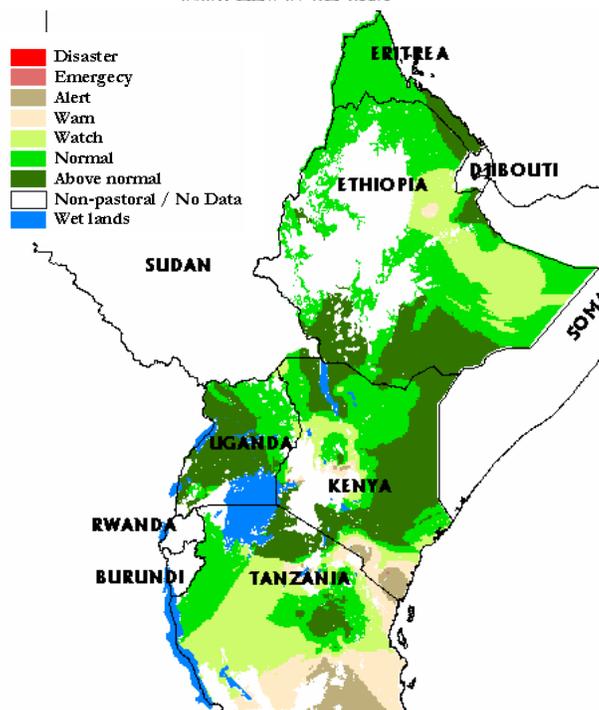
The relief needs in Eritrea are peaking in the period immediately preceding the *Kremti* season harvest in October/November. 1.7 million Eritreans are currently targeted for free food distributions. Beneficiary numbers are expected to decline after October. The existing pledges and pipeline is anticipated to be broadly sufficient to meet needs until the end of the year.

A major determinant of the food security outlook for 2004 will be the performance of the main crop harvest at the end of the year. The performance of the *Kremti* season rains has been generally good, although further rainfall is still required before the end of September.

Other important possible constraints to crop production include the availability of labor and machinery for cultivation, and the adequate supply of seeds and other agricultural inputs. Crop production estimates from the GSE are not yet available; however, field reports confirm generally favorable crop conditions.

There are plans to assess the 2004 relief needs in October, following crop production estimates in late September. The appeal will have to assess the extent to which Eritrea has recovered from the economic dislocations caused by the war, as well as the variability in crop production. As in Ethiopia, a major concern is disaggregating chronic and acute food insecurity and designing appropriate interventions.

Figure 3 Forage Deviation, 20th August 2003
Source LEWS/GL-CRSP

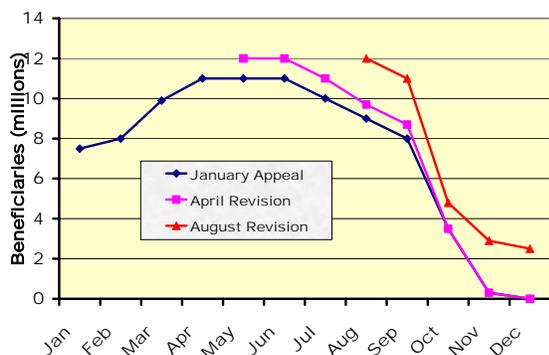


ETHIOPIA: DELAY IN PHASING DOWN EMERGENCY INTERVENTIONS

Large-scale relief distributions continue in Ethiopia in the period preceding the main *meher* harvest, with the anticipated caseload peaking during August and September. Beneficiary numbers are expected to drop sharply in the last quarter of the year (see Figure 4).

Figure 4: Beneficiary Numbers, Ethiopia, 2003

Source: Disaster Prevention and Preparedness Commission, Special Early Warning Report, 1 August 2003



The DPPC led an assessment of the *belg* producing areas during July. This concluded that, although the *belg* season was generally good, the rains were erratic in some parts. Furthermore, the recovery – in terms of agricultural production, assets and nutritional indicators – is only partial. Given this, it recommended that food distributions continue for longer than originally planned in the *belg* dependent areas and 600,000 new beneficiaries have been included. Food aid pledges are sufficient to cover the revised demand until the end of the year. The DPPC is appealing for an additional 250,000MT to provide buffer stocks to cover anticipated, but as yet un-assessed needs, at the start of 2004.

The *meher* crop is expected to be considerably better than last year given the relatively good rainfall, although localized areas of concern remain. This has facilitated a welcome stabilization of cereal prices. Despite this, widespread food insecurity, and the need for assistance, is anticipated to continue into 2004. Household assets and coping strategies have been exhausted by repeated shocks and alternative income sources such as labor markets, livestock and cash crops have been undermined. It is not anticipated that this resulting livelihoods failure will be reversed by improved crop production alone.

TANZANIA: EMERGENCY APPEAL BEING FORMULATED IN RESPONSE TO CROP FAILURE

The Government of Tanzania (GoT) has assessed that approximately 2 million people will require emergency assistance between October 2003 and March 2004. These recommendations are primarily based on the below average 2002/03 crop production: estimated at 7.55 million MT compared to 8.57 million MT in 2001/02. Cereal prices have risen somewhat compared to last year, but there is no direct evidence of rising malnutrition rates. The priority areas include central, northern and coastal regions. The GoT is proposing a package of interventions designed to protect livelihoods.

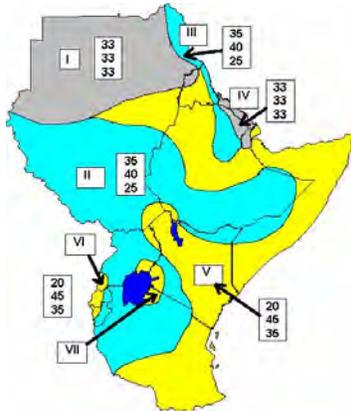
The GoT has announced the release of 32,450MT of cereals from the Strategic Grain Reserve to be sold at subsidized rates to stabilize markets. Donor assistance is requested for transport and distribution costs. The Government has also appealed for donor assistance to procure and distribute 45,000MT of relief food 3,200MT of seeds and 40,000MT of fertilizers. The GoT has asked WFP to take a lead in preparing an EMOP for the consideration of the donors. FAO has been requested to organize the seed and fertilizer appeal and distributions.

The 12th GHACOF meeting, held on 27th August, issued a rainfall forecast for September to December 2003 (see Figure 5a). In the absence of a strong ENSO signal, the forecast tends towards enhanced probabilities of near normal conditions. However, the forecast did distinguish two main regions: one with a slight tendency towards below-normal rainfall (yellow shaded zones) and one with a tendency towards above-normal rainfall (blue shaded zone).

The region with increased probabilities of near normal to below-normal rainfall includes areas that rely heavily on the short-rains. This raises some concerns, especially areas suffering from prolonged dry conditions and below average long-rains performance earlier this year. The areas that will require close monitoring include: the northern rift valley, southeastern districts of Kenya, the Sool/Sanaag plateau in Somalia and parts of the Somali region in Ethiopia. The Sool/ Sanaag plateau in particular is presently suffering from localized, but prolonged, dry conditions. The forecast indicates some areas with an enhanced likelihood of normal to above-normal rainfall. This could be very beneficial to the southern regions of Ethiopia and parts of Sudan that are currently experiencing significant rainfall deficits.

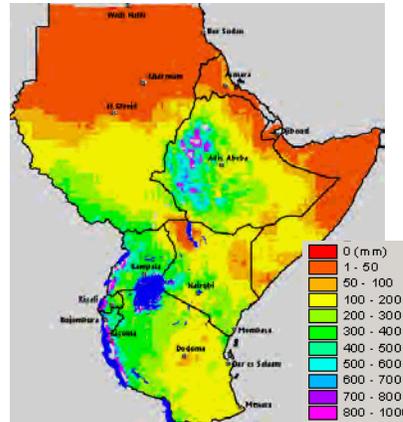
Using the USGS Forecast Interpretation Tool (FIT) the forecast has been converted into potential rainfall amounts and anomalies in Figures 5b and 5c. It should be noted that this forecast does not indicate high probabilities of large-scale rainfall deviations. The risk of flooding on the Juba and Shabelle river systems in Somalia is greatest at this time of year. While this forecast does not strongly suggest rainfall deviations consistent with flooding, it is a prudent precaution to intensify monitoring of river levels and rainfall in this area.

Figure 5 (a): "Short-rains" Forecast



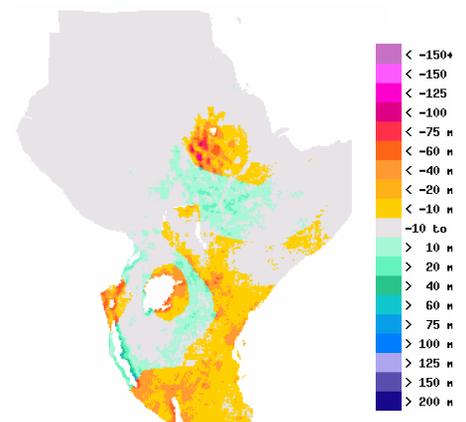
Source: DMC/Nairobi

Figure 5 (b): Potential Rainfall amounts based on the forecast



Source: USGS/FEWS NET

Figure 5 (c): Rainfall Anomalies based Forecast

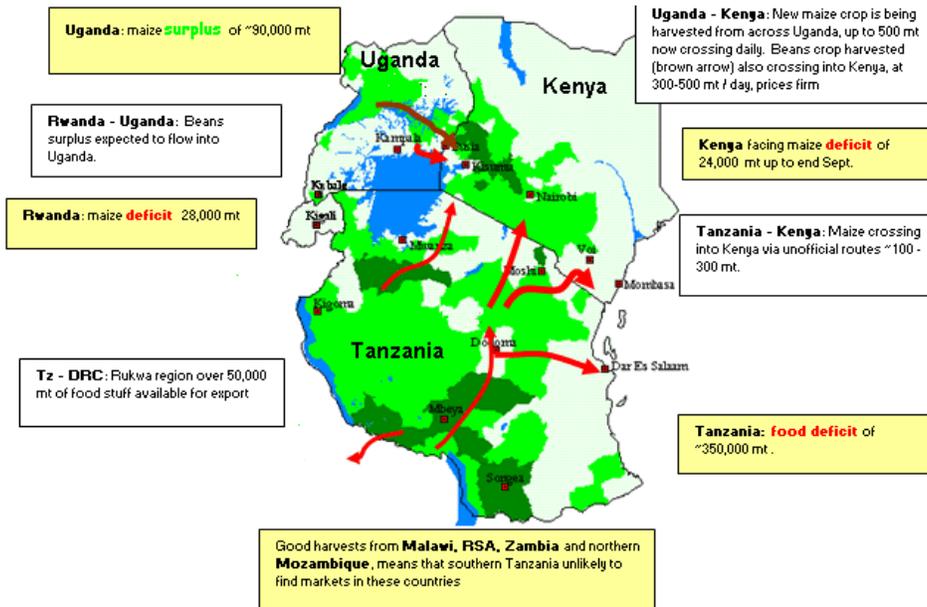


Source: USGS/FEWS NET

MARKET AND TRADE UPDATE

Figure 6 Maize and bean flows in the Greater Horn of Africa

Source: Regional Agricultural Trade Intelligence Network (RATIN)



For more information see www.ratin.net

Due to late start of the season, inadequate and erratic rainfall in central and southeastern Kenya, northwestern and coastal parts of Tanzania, below normal production of maize in East Africa is expected in 2002/03. Additionally the current maize deficit in Kenya will continue until the delayed harvest. High Kenyan prices are drawing in supplies from both Uganda and Tanzania, supplied through informal cross border trade.

In Kenya the 25% duty on non-COMESA imports is still in place. Imports from outside the region remain limited -- 48,000MT of South Africa maize has been imported into Kenya by the millers. The price of this maize, at current duty levels, is KShs 1650/90kg bag, still above current market prices. Tanzania has now lifted the 25% duty to encourage imports.

In Uganda, a tradable surplus of up to 90,000 MT of maize is expected this year. This crop is expected to be shared between exports to Kenya and procurement by WFP. Prices remain firm and above the five year average.

Conflict between the Sudan Liberation Army (SLA) and GoS in Greater Darfur in July is estimated to have led to the displacement of 70,000 civilians. However, these estimates remain provisional as the security situation precludes nearly all access required for humanitarian activities. The conflict is reported to have resulted in some direct casualties and fairly extensive population displacement. However, no verification has been possible and the location of the IDPs is unknown. The extent to which these IDPs have been able to move with assets, including livestock, and the coping strategies that they may be able to employ remains speculative. Humanitarian agencies remain poised to mount a response from the operational bases in El Fasher.

Flooding along the Gash river in eastern Sudan, in and around the city of Kassala, is now abating. Continual close monitoring of water levels remains in place. Traditionally river levels are expected to recede from October 15th onwards. A GoS/UN assessment estimated that 100,000 people had been affected, 55,000 of these 'severely affected' losing assets including houses. A limited response has been planned to provide shelter, water and sanitation, food and health interventions. Response activities started in early August and local and international inputs are reportedly well coordinated. UN relief is being provided under existing emergency programs. A long-term intervention is not deemed necessary – a relatively gradual onset to the floods allowed many important assets, including livestock, to be saved.

CONTACTS

Vedasto Rutachokozibwa / Nick Maunder
Famine Early Warning Systems Network (FEWS NET)
E-mail: ruta@fewsn.net / nmaunder@fewsn.net

Gideon Galu / Hussein Gadain
United States Geological Survey (USGS/FEWS NET)
E-mail: ggalu@fewsn.net / hgadain@fewsn.net

Dr Wilbur Ottichilo
Regional Center for Mapping of Resources for Development
(RCMRD)
E-mail: rcmrd@rcmrd.org

Prof. Jerry Stuth
Livestock Early Warning Systems (LEWS/GLCRSP)
E-mail: jwstuth@cnrit.tamu.edu

Robert Kaitho
Livestock Early Warning Systems (LEWS/GLCRSP)
Email: rkaitho@cnrit.tamu.edu

Mehari Tesfayohannes
Desert Locust Control Organization, Nairobi
Email: delco@insightkenya.com

Prof. Laban Ogallo / Zachary Atheru
Drought Monitoring Centre – Nairobi (DMC-N)
E-mail: dmcnrb@lion.meteo.go.ke

Robin Wheeler
World Food Programme (WFP), Kampala
E-mail: Robin.Wheeler@wfp.org

FOR FEEDBACK CONTACT: GHABULLETIN@FEWS.NET

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