

## EAST AFRICA Regional Food Security Outlook April to September 2009

- About 20 million people in the East Africa region are food insecure, due mainly to the cumulative effects of drought, conflict, market disruptions and transboundary animal diseases.
- In the most-likely scenario, rangeland conditions and water availability in the pastoral areas may improve marginally between April and June as the rains are predicted to continue through to mid-May. However, the seasonal rains are unlikely to bring about a substantive recovery of pastoral livelihoods because 3-4 successive failed rainy seasons have resulted in livestock losses. Food security conditions will continue to worsen between July and September, throughout the pastoral areas, as this period coincides with the normal dry season. The performance of the remainder of the March-May rainfall season is crucial for the food security conditions in these areas.
- In marginal agricultural areas, particularly in Kenya, food insecurity will worsen and the number of food insecure people will increase until the next rainy season in October/November 2009. Poor rural and urban households who are market dependant will continue to face high food prices that have reduced market access to food, especially during the lean season. Food security in the main agricultural areas will remain favorable.

### Current food security conditions

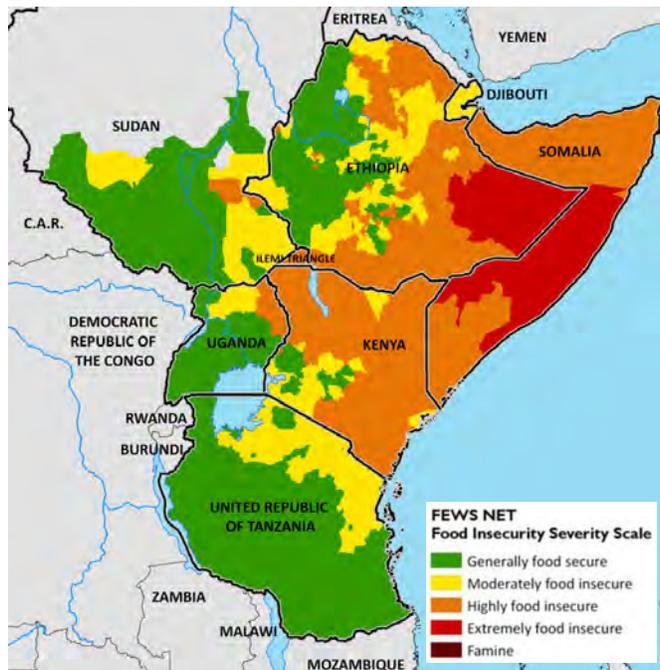
The current food security situation in the East Africa region is poor, with nearly all countries having significant food insecure populations; in total, about 20 million people. Most of the affected population groups are found within the pastoral, agropastoral and marginal agricultural areas of Somalia, Kenya, Ethiopia, Djibouti and Uganda. Population groups identified as chronically food insecure in Ethiopia, some of which had poor *belg* and *meher* harvests in 2008 are also part of this caseload. The main causes of the food insecurity include 3-4 successive below-normal production

FEWS NET East Africa  
Nairobi, Kenya  
Tel: +254 (0) 20 386 1475  
gha@fews.net

FEWS NET Washington  
1717 H St NW  
Washington DC 20006  
info@fews.net

FEWS NET is a USAID-funded activity. The authors' views expressed in this publication do not necessarily reflect the view of the United States Agency for International Development or the United States Government.

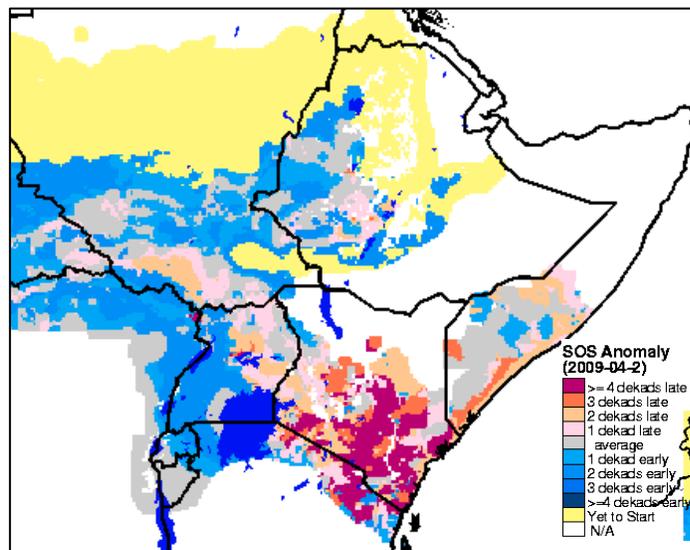
**Figure 1.** Current estimated food security conditions, April 2009



For more information on FEWS NET's Food Insecurity Severity Scale, please see: [www.fews.net/FoodInsecurityScale](http://www.fews.net/FoodInsecurityScale)

Source: FEWS NET

**Figure 2.** Start of Season Anomalies— 2009 March to May Season



seasons in pastoral and marginal cropping areas, as well as market disruptions and high food prices, conflict/civil insecurity and transboundary animal diseases.

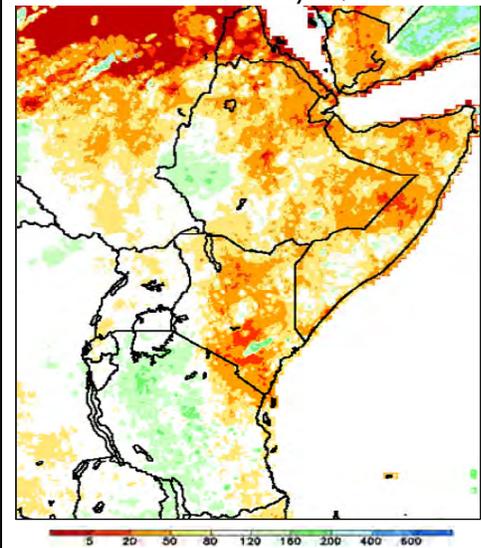
In many of the pastoral/agropastoral livelihood zones, successive poor rains which have meant poor livestock and crop production; poor livestock body conditions that have resulted in reduced sale prices and income; reduced herd sizes due to sales or death from drought-related conditions (as seen in central Somalia and parts of Ethiopia); and deteriorating terms of trade as staple food prices remain much above average, have been the main causes of the existing high and extreme food insecurity.

Other factors that have exacerbated regional food insecurity include: conflict and civil insecurity, high staple food prices, and trans-boundary diseases such as *peste petite des ruminants* (PPR), foot and mouth disease (FMD), and contagious bovine pleuro-pneumonia (CBPP). Conflict and insecurity (political and resource-based) remain widespread in Somalia but insecurity also remains a problem in southeastern Ethiopia, northern Kenya, Southern Sudan, and northeastern Uganda. Insecurity limits access to markets, pasture, water points, and farmland and causes human displacement and distorts prices, hence contributing significantly to food insecurity in the affected areas. The high staple food prices has also limited the food access of many market-dependent households, like the rural poor and a significant section of the urban population. Although prices are currently declining in response to seasonal food availability, a decline in international prices and a reduction in transportation costs resulting from a reduction in fuel prices, they remain much above the recent 5-year average in most markets across the region. A reduction in remittance inflows and reduced employment activities in key sectors such as tourism, and horticulture exports, following the global financial crisis, has also contributed to food insecurity.

As forecast, the March to May rainfall season has been slow to start, erratic and so far below normal in lowland pastoral and marginal agricultural production areas including the northern and southeastern lowlands of Kenya, neighboring areas of northern Tanzania, central and northeastern Somalia, and parts of southeastern Ethiopia. Although the rains have intensified since mid-April, they are still below normal in these areas; in the east moisture deficits of 50 percent of normal or more have been measured (Figure 3). These areas, most of which already face high/extreme food insecurity, normally receive 50 percent or more of their annual rainfall during this season. In the past 4-5 months, a deterioration in food security conditions in these areas has been seen due to the poor performance of the smaller October to December 2008 rains, as well as past shocks.

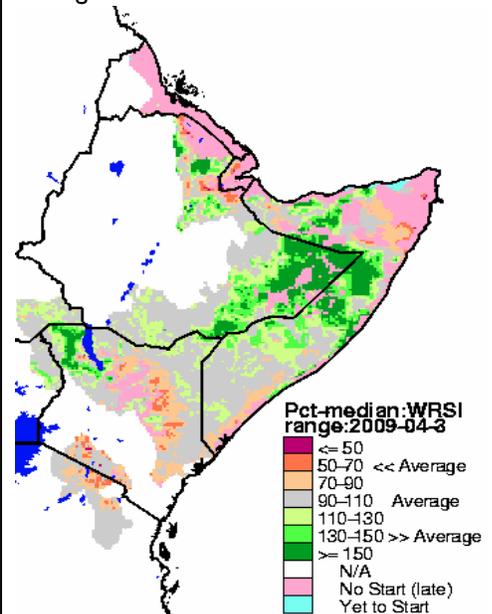
The month of May marks the end of the main rainy period and so far the rains are insufficient for successful crop production in the agropastoral and marginal cropping areas within these lowlands. Pasture and water conditions have also only marginally improved in most of these areas and vegetation conditions remain below normal. As a result livestock and milk production are not likely to improve significantly. Improvements in livestock prices have been seen in most areas as is typical during the rainy season as fewer animals are taken to the market because it is normally herd re-building time among pastoral and agropastoral groups.

**Figure 3.** Rainfall estimates—percent of normal for March 1 to May 24, 2009



Source: NOAA/CPC

**Figure 4.** Projected rangeland conditions through the end of the season



Source: USGS/FEWS NET

## Most-likely food security scenario (April-September 2009)

### *Pastoral, agropastoral and marginal cropping areas in the Eastern Sector*

These areas include parts of south-central and northern Somalia, southeastern Ethiopia (particularly Somali Region), northern pastoral areas and southeastern marginal cropping areas of Kenya, the inland pastoralists of Djibouti, and Karamoja region in Uganda.

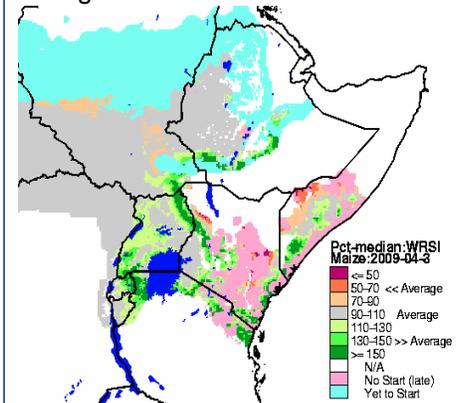
The analysis of the most likely food security scenario for the period April to September 2009 among these groups is based on the following key factors: (i) the March/April to May/June rainfall is expected to be below normal overall (Fig 2, 3 and 4) although localized areas may receive sufficient rainfall; (ii) staple food prices may decline but will remain above the five-year average; (iii) The usually dry June-September period in these areas will be drier than normal because of the below normal preceding rainy season and forecast higher surface temperature (by about 0.5-1°C) during that period; (iv) the conflict and insecurity situations are likely to remain the same in the affected areas; (v) currently high levels of acute malnutrition are unlikely to significantly decline, unless significant humanitarian assistance is allocated to address this issue.

The April to June season is likely to have a mixed performance - ranging from normal to below-normal (Figure 3 and 4). During this period, a slight improvement in rangeland conditions is foreseen between April and June for most areas (Figure 6). Despite the initial favorable conditions, the possibility of a substantive recovery in pastoral areas is limited by the fact that end of the season (late May/June) is approaching and it is unlikely that the forecast rainfall for the remainder of the season will compensate for the effects of delayed and poorly distributed rainfall during the season. In the April to June period, livestock body condition and milk production may increase (where livestock deaths did not occur and deliveries have taken place). Livestock prices are likely to remain average for this period before the dry season starts in June. However in those areas where livestock deaths have occurred, like in Central Somalia, and water trucking has been ongoing even in April, it is unlikely that any significant livestock production improvements will be seen. Overall, in these areas, unless more well distributed rains are received in the remainder of the March to May season, improvements in pasture and water availability are likely to be only temporary, and the upcoming dry June-September season is expected to be drier than normal (Figure 7). Even with near-normal rains, it would be difficult for the food security conditions in these areas to improve significantly due to cumulative effects of past droughts and asset losses; successive good rainfall seasons would be needed to rebuild herds and fully recover.

In the southeastern Kenya marginal agricultural areas, the poor March to May rainy season marks the fourth successive below normal rainfall season. The livelihood groups in this area largely depend on own-grown crops (mainly maize). Although their main production season in the October to December period, because recent harvests have been poor these populations' food stocks are very low and their coping abilities are significantly eroded. Malnutrition rates are already serious or critical in most areas and are unlikely to improve because food access will remain poor during the projection period. Civil insecurity is unlikely to ease while staple food prices will most likely remain above the 5-year average. Already observed are reducing levels of remittances from relatives abroad (by over 15% in some countries) due to the global economic crisis, which will contribute to declining incomes. Remittances are an important source of income for many households in Somalia, Ethiopia, Eritrea, Sudan and Kenya. This and declining livestock prices (the main source of pastoral and agropastoral incomes) is likely to continue undermining the purchasing power of these livelihood groups during the entire projection period, particularly during July to September. Therefore, the food security projection for both the April to June and July to September periods is that the situation could further deteriorate unless significant humanitarian assistance is allocated.

Factors that may mitigate this outlook include humanitarian assistance, which could improve food access and mitigate the high level of malnutrition. But for such assistance to have a positive impact, it has to be sufficient and well targeted, and this is not certain. Another potential mitigating factor is continued and well distributed rainfall into June, which could significantly slow or even reverse some of the deteriorating production and food security conditions, but forecasts indicate that this will be unlikely.

**Figure 5:** Projected crop conditions through the end of the season



Source: USGS/FEWS NET

**Belg production areas of Ethiopia**

The areas considered here are North and South Wollo in eastern Amhara region; southern parts of SNNPR, and parts of eastern Oromiya region, where *belg* production is most significant.

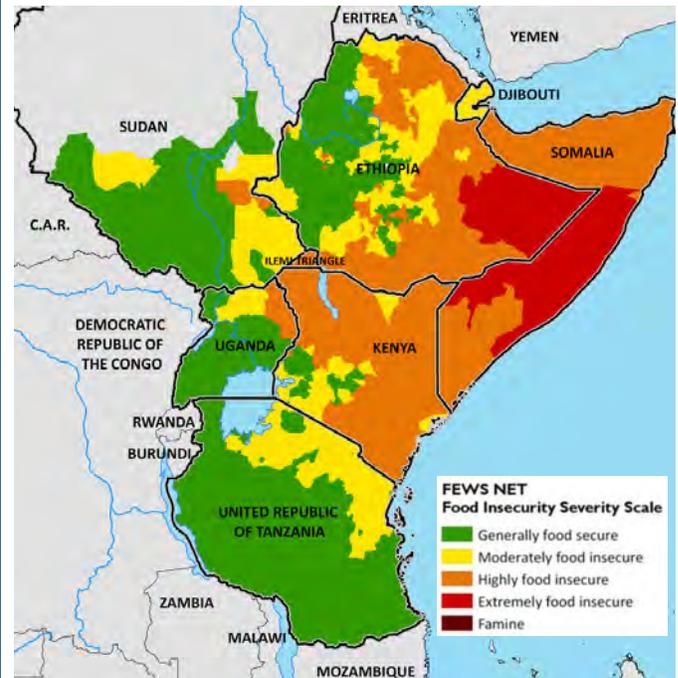
The main determinants of the food security outlook through September 2009 include: (i) existing structural/chronic food insecurity; (ii) poor 2008 *belg* production, low current food stocks and likely below normal *belg* 2009 production; (iii) poor *meher* 2008 production in parts of the Amhara *belg*-producing areas (Figure 5); (iv) the above average staple food prices (v) In SNNPR, poor sweet potato crop in 2008 and below normal crop in 2009, as well as reduced income opportunities resulting from poor coffee cash crop and reduced labor opportunities; (v) high and deteriorating child malnutrition levels in both SNNPR and eastern Amhara *belg*-producing areas and Bale zone of eastern Oromiya region; and (vi) a higher than usual malaria prevalence in lowland areas of SNNPR. In many of these areas, however, the *belg* season has picked up and prospects of *belg* harvests have improved.

During the April-June period the food security conditions are likely to decline significantly in these areas as the effects of the hunger period will be accentuated by low food stocks, and in SNNPR by the poor sweet potato harvest, lower than normal incomes from a poor coffee crop, low labor opportunities, and higher than normal incidences of malaria. During this period, malnutrition levels may continue to rise as food access declines, unless there are sufficient interventions to curb this. In the early parts of the July-September period, *belg* harvests are expected in many of these areas, especially in SNNPR – which will likely be below normal, but better than 2008 harvests. However, in the *belg* areas of north and south Wollo of Amhara region, which had a poor *belg* and *meher* season in 2008 and are currently facing a poor *belg* season, the food security situation is likely to decline further even in the July-September period (Figure 7). Mitigating factors are likely to be enhanced humanitarian support through emergency and PSNP resources, as well as the potential for improved *belg* rainfall performance in May/June and a good *meher* (July-September) rainfall season, which is forecast to be favorable. Both these are unlikely to sufficiently reverse the expected deterioration.

**Main Cropping Areas**

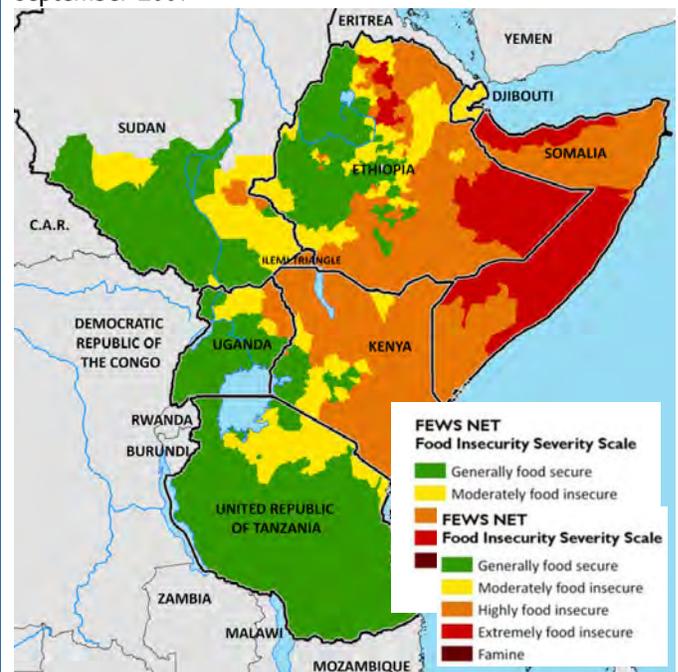
These areas include central and western Kenya, south-central Uganda, most of Tanzania, southern Sudan, and the *meher* areas of Ethiopia. The main considerations for the most likely scenario are: (i) good current and forecast rainfall for the projection period; (ii) good crops in 2008 and significant stocks; (iii) high food prices, which largely work in favor of these

**Figure 6.** Most-likely food security scenario, April–June 2009



Source: FEWS NET

**Figure 7.** Most-likely food security scenario, June–September 2009



Source: FEWS NET

surplus farming communities, but above average input prices; (iv) The main harvests in Kenya, southern Sudan and Ethiopia and many parts of Uganda will be received in the last quarter of the year, although some harvests would start to come in by July in Kenya and Uganda.

Overall, the main crop producing livelihood groups are expected to be generally food secure both during the April to June and July to September period (Figure 6 and 7). However, food stocks are likely to diminish with the progression of the current lean season until early July when some harvesting would begin in Uganda and Kenya. The lean season in Southern Sudan ends in August while for most of *meher* areas of Ethiopia it ends in October. Although most of these areas are expected to be food secure, some parts are expected to experience moderate food insecurity during entire outlook period due to: (i) low food stocks resulting from a below normal production in 2008 crop in Kenya's central highlands; (ii) the expectation of below normal crop in the bimodal areas of northeastern Tanzania in 2009; and (iii) structural food insecurity issues in many areas of Ethiopian highlands.

#### **Other Considerations**

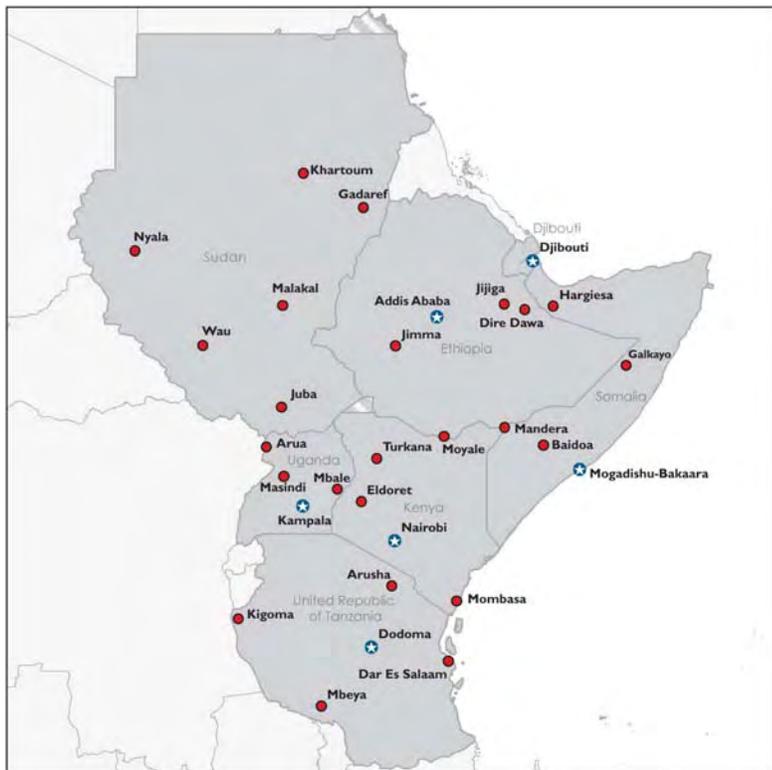
- (i) High staple prices to continue: Staple food prices in all countries of the region have remained above 5-year average since early 2008 although declines are being seen in most markets. The April to June season is largely a lean season for most parts of the region where it is mainly a growing and livestock fattening season, following the long and dry January to March period. The July to September period is also a dry period for the southern and equatorial sector of the region with only the smaller harvests taking place except in the agropastoral livelihoods of Somalia and Ethiopia. As a result, food prices are unlikely to decline significantly until the last quarter of 2009. This is typical in these areas. The exception is Tanzania, where the harvests begin in May and food prices are expected to start declining from this period.
- (ii) Export bans - Tanzania, Kenya and Ethiopia have cereal export bans in place. Due to official cereal export bans in place in Tanzania, it is unlikely that the earlier harvests (May-July) in this country will result in significant maize inflows into Kenya (the ban is estimated to have reduced cross-border maize trade between Kenya and Tanzania to only about 40% of normal). Ethiopia's export ban makes it difficult for importing countries like Djibouti and Somalia to obtain affordable cereals. In all cases, the export bans have not achieved the objective of stopping cereal outflows and keeping domestic prices low, but have largely been responsible for price distortions in the region, which have exacerbated poor food access among market dependent households.
- (iii) The urban poor have been becoming increasingly food insecure since 2008 when staple food prices peaked in the region, although there are few estimates on the number of people affected. The urban poor are net food buyers and depend mainly on wage labor and small trade for income and almost entirely on purchase for food. The behavior of market supply and prices therefore significantly affects urban food security. During the projection period (April – September) most of the poor urban households, particularly in Kenya, Ethiopia, Somalia and Djibouti would still have to contend with high prices, and poor food access. There may be a marginal improvement in food availability and a corresponding reduction in prices during the smaller July/August harvest period but no major improvements are expected during this period. In Kenya an estimated 4-5 million urban people are assessed to be highly food insecure as a result.

Potential mitigating factors to the price rises: (i) The impact of Uganda production and Tanzania production, despite the exports bans, will help improve food availability particularly in Kenya; (ii) Imported rice prices in Somalia and Djibouti are also expected continue declining, in line with the decreasing international commodity prices. However, increased insecurity in the Gulf of Aden, and its impact on transport costs, could negate the gains of reduced international prices.

**Table I:** Events which could affect the food security outlook

Geographic Focus Area	Possible events in the next 6 months that would change the most likely scenario in this area	Impacts on food security conditions	Likelihood of occurrence*	Key variables to monitor
Pastoral areas— (Northeastern Uganda, southern Ethiopia, northern Kenya, and central and northern Somalia)	<ul style="list-style-type: none"> <li>March-May rains are significantly better than forecast</li> </ul>	<ul style="list-style-type: none"> <li>Improved crop and livestock production</li> </ul>	unlikely	Rainfall totals and distribution for the remainder of the March to May season
and  Marginal agricultural areas (South-eastern lowlands and northeastern border area of Tanzania)	<ul style="list-style-type: none"> <li>Price of food commodity reduce dramatically</li> </ul>	<ul style="list-style-type: none"> <li>Improved food access through markets</li> </ul>	Very unlikely	Staple food prices
Belg crop production areas of Ethiopia	<ul style="list-style-type: none"> <li>Significantly improved rains for the remainder of the season in May</li> </ul>	<ul style="list-style-type: none"> <li>Improved water and pasture availability leading to substantive recovery of pastoral livelihood</li> <li>Normal to above normal belg crop</li> </ul>	Unlikely	Rainfall through the remainder of season
	<ul style="list-style-type: none"> <li>Prices of food commodities decline to 5- year average levels</li> </ul>	<ul style="list-style-type: none"> <li>improved access to food among poor market-dependent households</li> </ul>	Unlikely	Food prices and Terms of trade
Main Agricultural areas— (Meher areas of Ethiopia, Western Kenya and Most of Uganda, Tanzania and southern Sudan)	<ul style="list-style-type: none"> <li>Long rains significantly below normal</li> </ul>	<ul style="list-style-type: none"> <li>Increased water stress and reduced yields</li> </ul>	Unlikely	Rainfall totals and distribution  Staple crop production

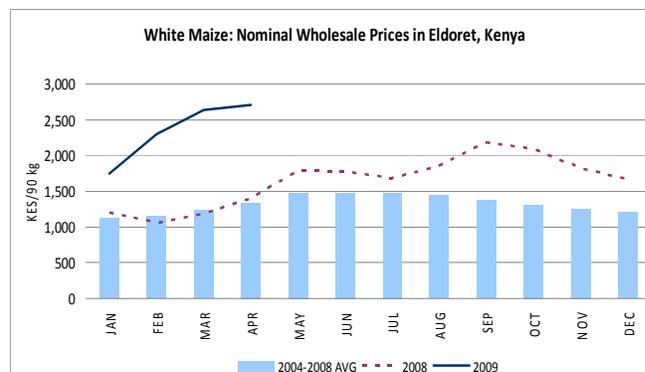
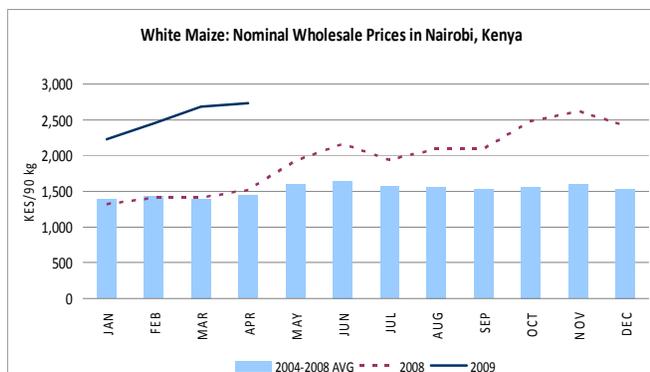
* Probability levels	Description
Likely	Likely to occur in the time period under current conditions
Unlikely	Could occur in the time period if conditions changed moderately
Very unlikely	Could occur in the time period if conditions changed significantly

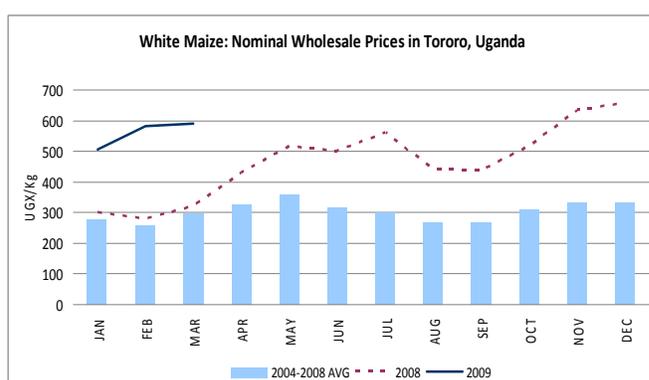
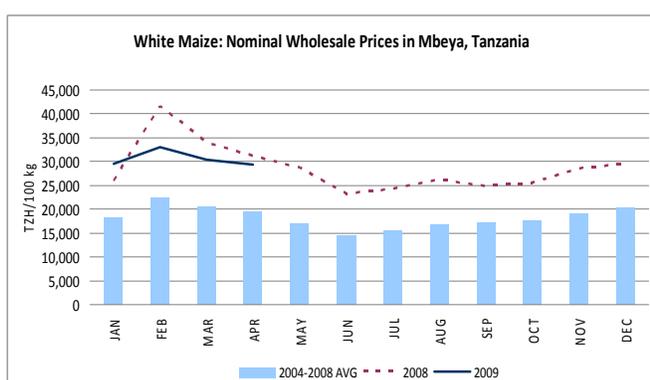
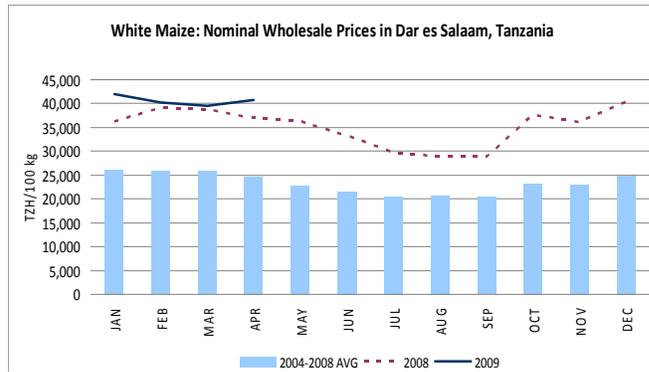
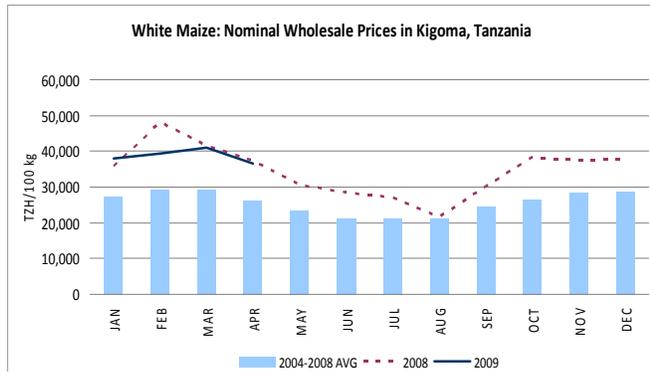
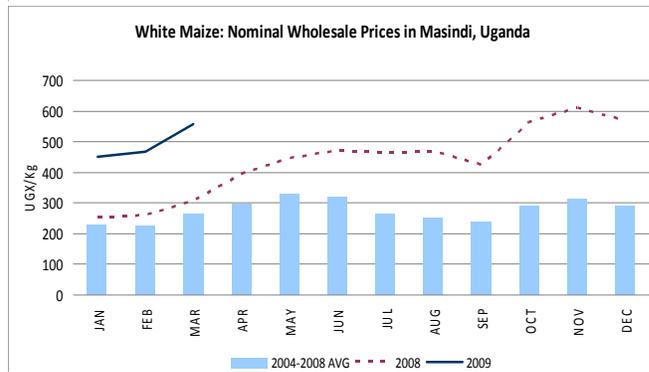
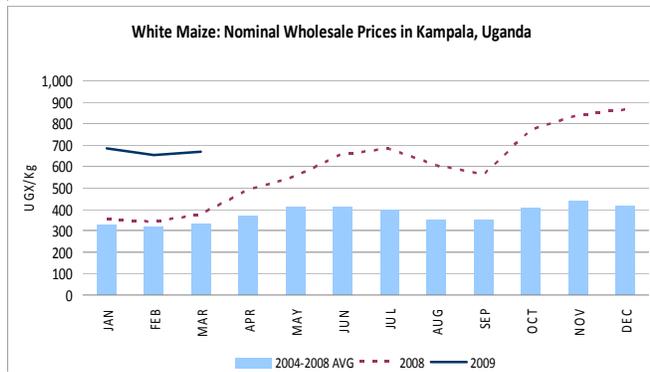
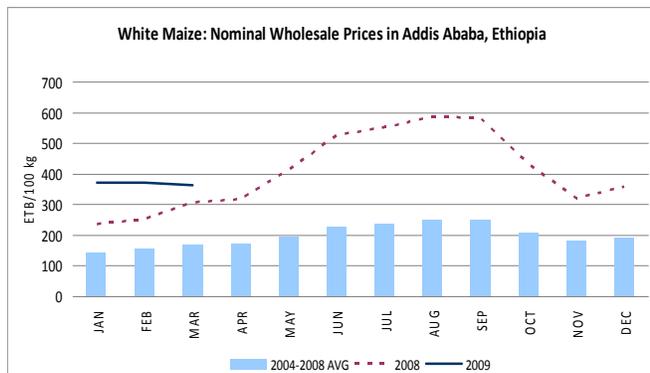


Monthly prices are supplied by FEWS NET enumerators and a range of partners: in Ethiopia, the Central Statistics Agency and FEWS NET; in Kenya, the Ministry of Agriculture (Market Research Branch); in Uganda, the Uganda Market Information System; in Tanzania, the Ministry of Trade, Industries, and Marketing; in Djibouti, the Ministry of Finance; in Somalia, FEWS NET; in Sudan, WFP.

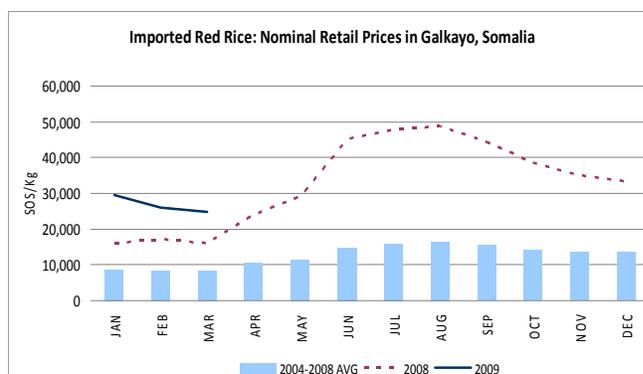
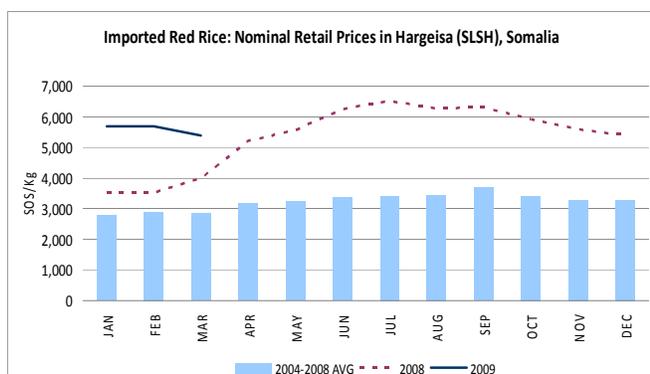
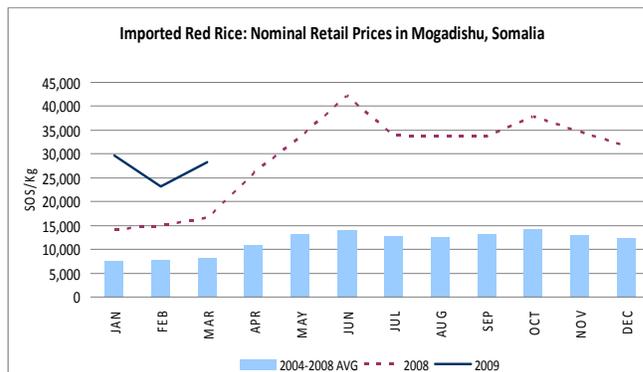
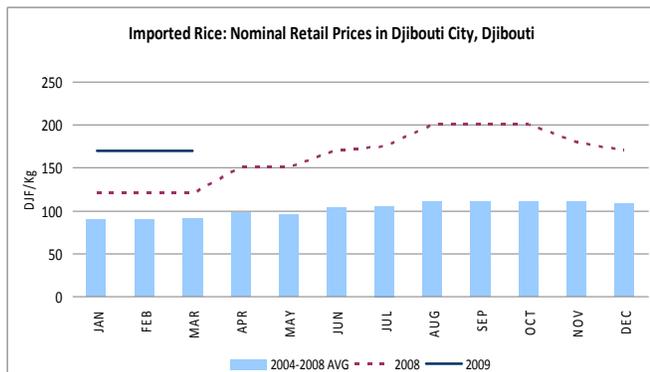
White maize is the main staple grain consumed in Tanzania, Kenya, and Ethiopia. In Uganda, white maize is grown mainly as a commercial crop for export in the region. Imported rice is a major staple for Djibouti and Somalia, which mainly consume *belem*—the imported red rice. Tanzania is also a major producer and source of rice in the region while Kenya and Uganda are minor producers. Both red and white sorghum are produced and consumed in the region. This is an important staple in Sudan, Djibouti and Somalia as well as in other marginal agricultural areas of the region. It is also a substitute cereal among the rural poor. Red sorghum is mainly grown in Ethiopia, Sudan, and Somalia, and is the preferred type for households in Djibouti. Beans are an important source of protein and a complementary food crop grown in the high potential agricultural areas of Kenya, Uganda, Tanzania, Rwanda, Burundi and Ethiopia. It is consumed across household types. Maize and beans are the most heavily traded commodities in the region. The cooking banana—*matoke*—is the primary staple in Uganda. Uganda is also a main source of cooking and other types of bananas traded in the region especially in Southern Sudan. However, bananas are not trade nearly as heavily as maize or beans.

**WHITE MAIZE:** The markets below represent the major producer and consumer markets in countries where white maize is heavily consumed as the staple.

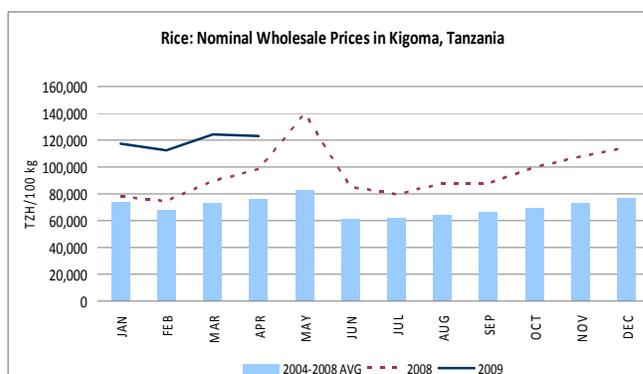
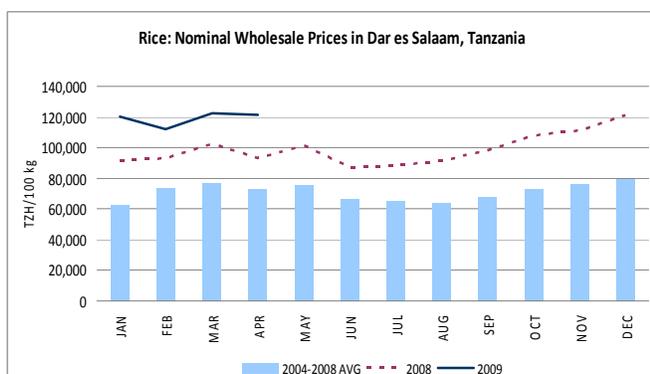




**IMPORTED RICE:** These are the main retail markets in Djibouti and Somali where imported rice is heavily consumed.

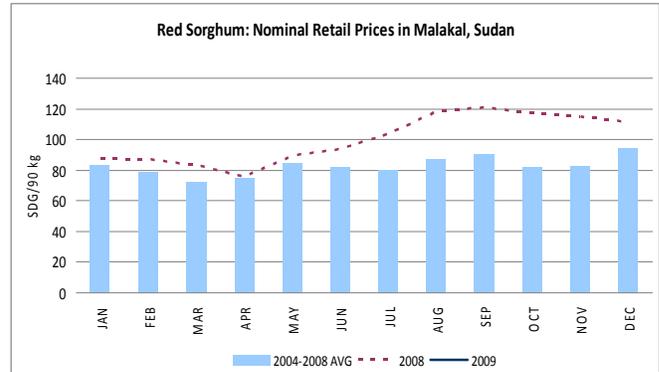
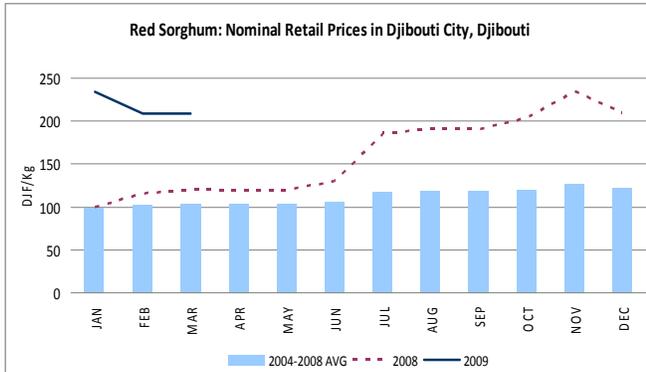


**LOCAL RICE:** Local rice is produced mostly in Kenya, Uganda and Tanzania. With the exception of Tanzania, most countries in the region are net importers of local rice, which has high demand in urban areas.

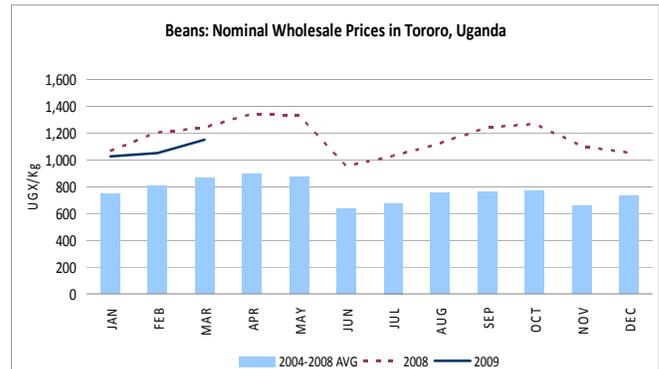
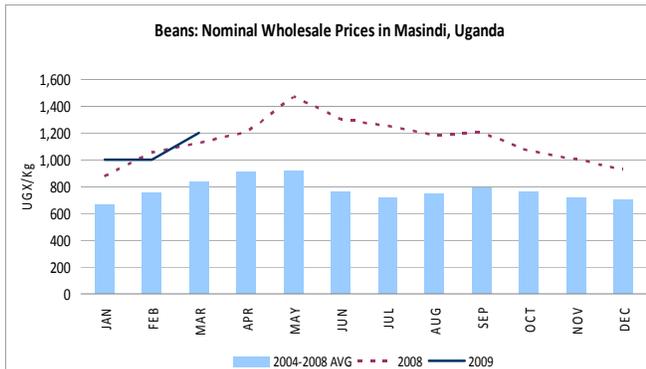
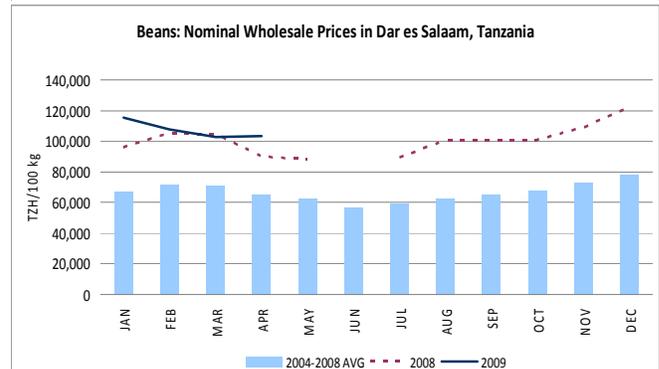
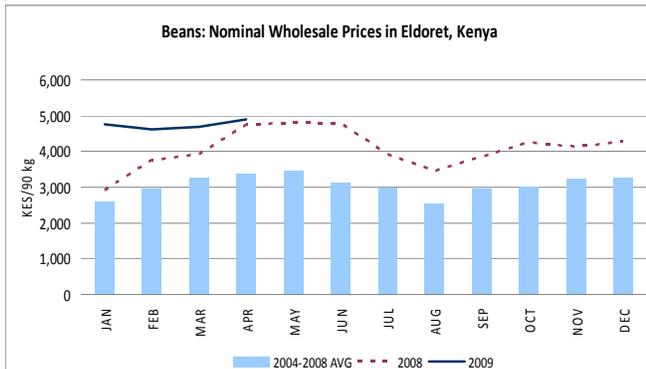
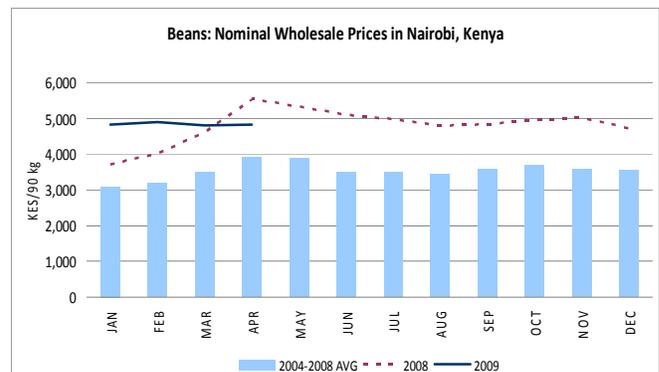
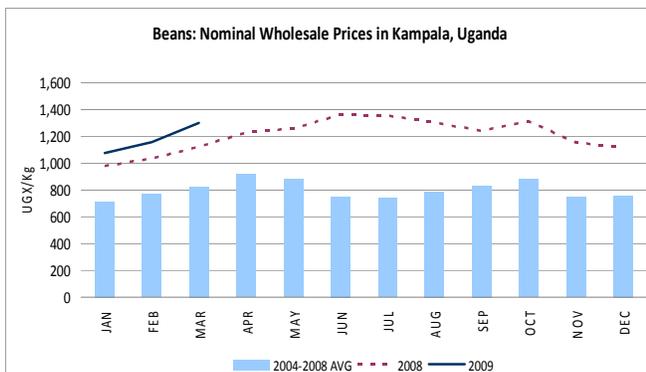


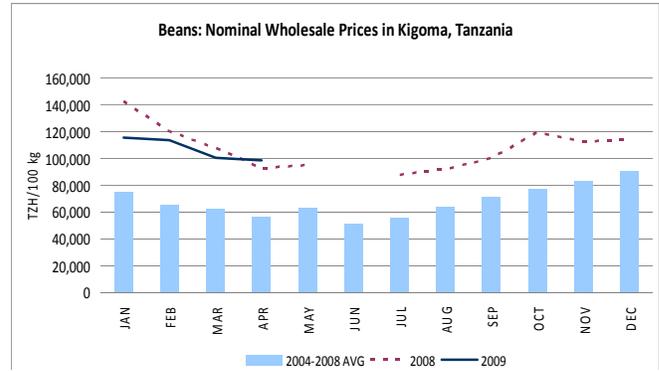
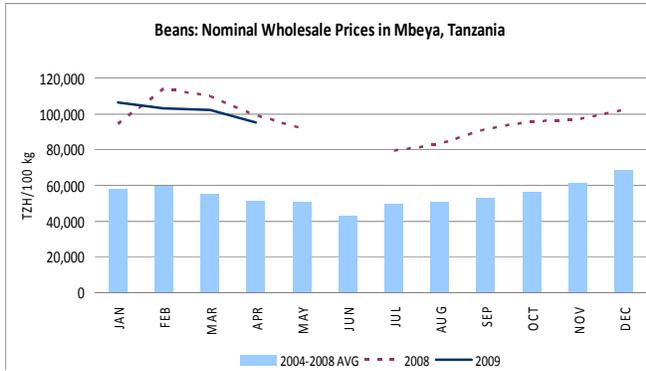
**RED AND WHITE SORGHUM:** Sorghum, both red and white, is an important consumption and production staple for many households in the region. These markets demonstrate the variety of places it is produced and consumed.





**BEANS:** Beans are a primary protein source throughout the region, especially in Kenya, Uganda and Tanzania. It is also a staple food in northern Sudan as well as in Rwanda and Burundi. These represent the capital city markets in Kenya, Uganda and Tanzania as well as the main production areas.





**MATOKE/BANANA:** These are the wholesale and retail prices for matoke, cooking banana, in the capital city market of Uganda.

