EAST AFRICA
Regional Food Security Outlook

October 2009 to March 2010

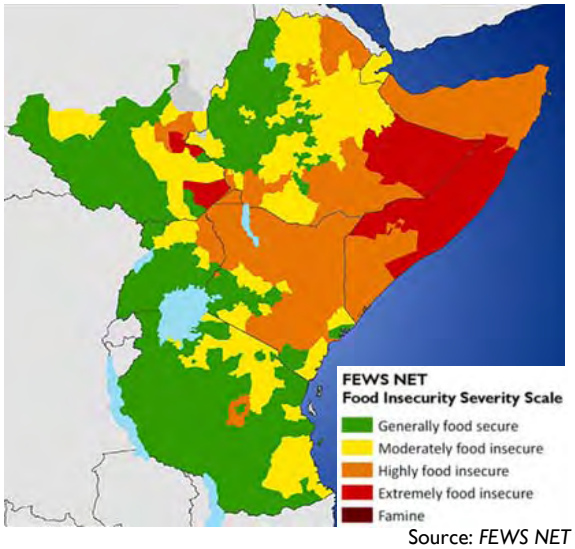
- About 17 million people in the East Africa region are highly or extremely food insecure (Figure 1) and are in need of emergency humanitarian assistance. This is mainly due to the cumulative effects of poor rainfall/droughts in pastoral and marginal cropping areas in the eastern sector of the region, civil insecurity/conflict and consequent population displacement and disruption to markets, and high food prices.

- In the most-likely scenario for October to December 2009, the October to December rains are expected to be above normal due to the El Niño event, particularly in the eastern drought-affected sector. This will result in improved water and pasture availability in pastoral areas, and heightened prospects for off-season and expanded crop planting in marginal cropping areas. However, immediate recovery and significant food security improvements in these areas are unlikely.

- The beneficial effects of above-normal rains could be undermined by flooding in riverine areas, particularly in Kenya, Somalia, and Ethiopia, causing increased risk of waterborne diseases, damage to infrastructure and assets, and disruption to markets and aid deliveries. October to December is the harvesting season for the main cropping areas of Kenya and Ethiopia, and El Niño-induced unseasonable rains could cause crop losses during the harvest period, compounding the already expected below-average harvests. Food prices will continue to be above the five-year average in most areas, although some declines will likely occur during October to December in most parts of the region, due to incoming harvests and significant declines in world food prices. The food insecure population could decline marginally during the October-December period, although the number could rise if the anticipated floods cause population displacements.

- In the most-likely scenario for January to March 2010, the usually dry and harsh season is expected to be milder and shorter, particularly for the lowland pastoral and marginal agricultural areas. The above-normal rains are expected to continue into January 2009, enriching pastures, further recharging water points, and heightening prospects for off-season cropping. Continued rains would also enhance water resources for irrigation, domestic and commercial use, and hydropower production, which could improve urban food security. In most countries, food prices are expected to remain above five-year averages, although the harvests and improving world prices could cause declines. Overall, food security improvements in pastoralist and marginal cropping areas are expected, although full recovery requires several successive good seasons. Thus, the food insecure population could continue to decline marginally during this period.

Figure 1. Current estimated food security conditions - October 2009



Source: *FEWS NET*

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

Current food security conditions

Currently 17 million people are highly or extremely food insecure in the East Africa region (Table 1) and require emergency humanitarian assistance. The main drivers of this food insecurity include successive below-normal rainfall seasons and drought conditions, particularly in lowland pastoral and marginal production areas of the eastern sector; civil insecurity/conflict and displacement and resulting disruption to markets, particularly in Somalia and Sudan, and other pastoral areas; and high staple food prices. Drought conditions have caused livestock mortality and household asset loss and undermined pastoral household incomes and coping strategies. Livestock loss among pastoral groups, which has been

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close to 50 percent of the more drought-susceptible cattle and sheep, in some areas like Central Somalia, means that recovery will be a long drawn experience. Because of the protracted and successive droughts, a minimum of two to three successive good seasons are required for recovery among the pastoral livelihoods. In addition, some income generation options (such as labor-intensive work schemes) will be necessary to ensure that pastoral households do not draw down on their assets.

In the main cropping areas of Kenya, Ethiopia, Sudan, and parts of Uganda, crop performance in 2009 has been below average due to below normal March to May rains which are useful for crop establishment, and subsequent below-normal June-September rains, which contribute significantly to crop performance. This means that food supplies will be below average after the current (October-December) harvest season, and prices are unlikely to decline significantly.

Table 1: Estimated population in need of emergency assistance*

Country	Total (in millions)
Djibouti	0.08
Ethiopia**	6.2
Kenya	3.8
Somalia	3.6
South Sudan	1.3
Tanzania	1.5
Uganda	1.15
Total	**17.63**

Source: *FEWS NET*

*Food and non-food assistance

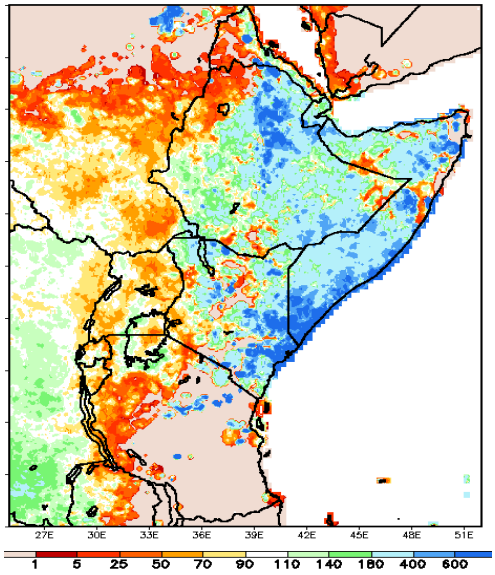
**An additional 7.8 million people in Ethiopia will receive assistance through the PSNP.

Other factors driving food insecurity include (i) civil insecurity, resource-based conflicts and/or inter-tribal conflicts in south-central Somalia, southern Sudan, northern Kenya, northeastern Uganda, and southeastern Ethiopia; and (ii) high food prices above the five-year averages, in spite of declines in staple food prices since late 2008 in response to increased food supplies in main crop producing countries (Ethiopia, Kenya, Uganda, and Tanzania) and declining world prices (in main importing countries like Somalia and Djibouti). Continued high food prices are driven by below normal local supplies while some countries, such as Tanzania and Ethiopia, continue to support cereal export bans. With harvests already underway in the main growing areas (albeit below average), prices are expected to remain the same or decline marginally.

Seasonal Overview

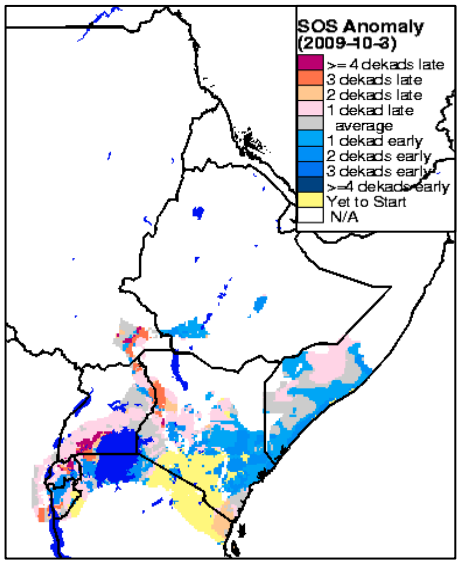
October marks the start of the October to December rains, mainly in the equatorial parts of Eastern Africa (particularly Uganda, Kenya, Somalia, southern Ethiopia and southern Sudan, as well as Tanzania, Rwanda, and Burundi). The rainfall performance so far has been near normal to above normal in most areas in the eastern sector, with southern Ethiopia, south-central Somalia and most of Kenya receiving above normal rains (Figure 2). The rainfall performance to date closely follows the forecasts of a timely onset and heavier than normal rains in the eastern sector. Rain gauge observations support satellite imagery in south-central Somalia and eastern Kenya, indicating that rainfall is two to four times above what average. Consequently, the cropping season has started normally so far (Figure 3), though localized flooding has occurred in parts of Kenya's coastal areas and along the Shabelle River in Somalia. More rains are expected in these areas, and with soils already saturated, this could result in damaging floods and disrupted transportation.

Figure 2. Rainfall Performance, percent of normal, October 1 – October 31, 2009



Source: *USGS/FEWS NET*

Figure 3. Start of Season Anomalies– 2009 October to December Season



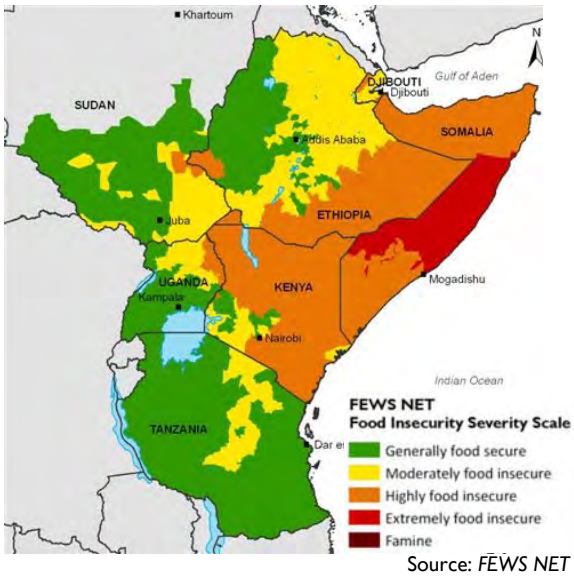
Source: *USGS/FEWS NET*

Most-likely food security scenario (October 2009 to March 2010)

October to December most likely scenario

The October-December rainy season is significant mainly for pastoral, agro-pastoral, and marginal cropping areas in the eastern sector of the region, where this season contributes about 40-50 percent of the total annual precipitation. These areas include parts of south-central and northern Somalia, southeastern Ethiopia (particularly Somali Region and Borena zone), northern pastoral areas, the southeastern marginal cropping areas of Kenya and the coastal pastoral areas of Djibouti. In addition to the pastoral areas, these rains are critical for both bimodal vuli crops and unimodal msimu crops in Tanzania, which start in October and continue to May.

Figure 4. Most likely food security scenario, October–December 2009



Source: *FEWS NET*

The analysis of the most likely food security scenario for the period October to December 2009 is based on the following assumptions:

- Normal to above-normal El Niño-induced rains continue throughout the quarter, intensifying in November 2009, and likely continuing into January 2010. The above normal rains are mainly expected in the eastern sector, mainly a pastoral/agropastoral area that has suffered successive rain failures.
- Low likelihood of a serious outbreak of economically important livestock diseases like Rift Valley Fever (RVF).
- Initial below normal-rainfall in main cropping areas of central Tanzania, which may affect crop establishment.
- Possibility of unseasonable rains occurring during the peak harvest season (October to December) in the main cropping areas of Kenya and Ethiopia.
- Staple food prices will decline only marginally or remain at the current levels of above the recent 5-year average.
- Civil insecurity/conflict continues in Somalia while civil insecurity/resource-based conflict remain a problem in southern Sudan, northern Kenya, northeastern Uganda and southeastern Ethiopia.

The most likely food security scenario for the October to December period is highly dependent on the start and performance of the El Niño-induced rains in the areas that usually receive the October-December rains. Although is it still too early to know how the rainy season will progress, the expectation is for normal to above-normal rains over the pastoral areas. These rains will increase water recharge and regenerate pastures, which would immediately ease the costs of water trucking and mitigate drought-related livestock mortality. Furthermore, agropastoral and marginal cropping areas are likely to crop more land and to engage in off-season cropping in order to take advantage of the above normal rains. Although some initial deaths of drought-weakened livestock from the cold and related effects have occurred, the regenerated pasture and improved water availability will mean improved livestock body conditions and prices. In addition, livestock which had migrated to distant places in search of water and pasture will return to their areas of origin and this could improve household milk availability.

Therefore, livestock conditions will likely improve during the quarter (October to December) but there will be a lag of approximately two to three months before own-produced livestock products and crops (among agropastoralists) are available to improve food security significantly. Any substantive recovery of the pastoral livelihoods will require a number of successive good seasons because of the initial livestock mortality during the drought and because animals require time to reproduce. Although marginal improvements in food availability and access are expected during the quarter among these groups, food insecurity ranging from moderate to extreme levels will most likely persist in many areas through the end of the year (Figure 4).

The beneficial effects of the above-normal rains during the October to December outlook period could be undermined by the potential negative effects of the rains, which include flooding and flood damage, road blockages that limit the movement of commercial and relief supplies, and an increased risk of water-borne diseases. In the high potential cropping areas (especially in Kenya and Ethiopia), unseasonable rains could cause damage to ready-to-harvest crops. Usually during

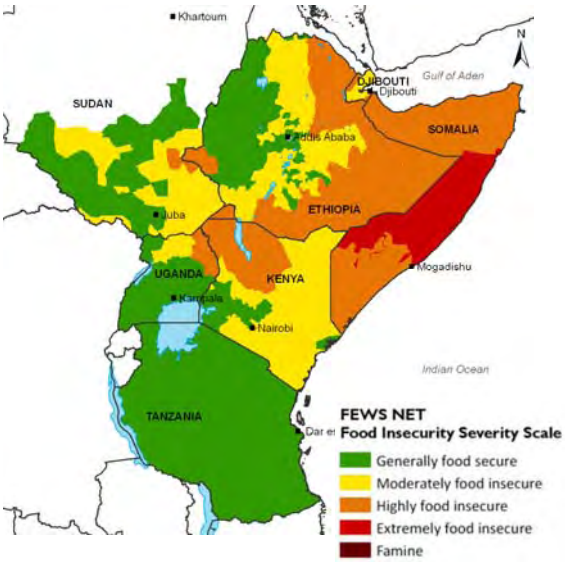
El Nino events, flooding is one of the main risks along the Tana River and lake Victoria basin in Kenya and the lower Juba and Shabelle River valleys in southern Somalia, which would cause temporary population displacements. Localized flooding has already occurred along some river basins around Kenya's coast and Lake Victoria basin. The fear exists of a recurrence of Rift Valley Fever, a viral livestock disease that can be passed to humans, which has serious economic implications. However, a significant outbreak is unlikely given that most livestock are immune from the 2006 infection and also control measures are in place, particularly in Kenya, which is susceptible to the disease during El Nino events.

January to March 2010 most likely scenario

The analysis of the most likely food security scenario for period January to March 2009 period is based on the following assumptions:

- Milder and shorter than normal January to March dry season due to residual water and pasture availability and possible extension of the rains into January 2010;
- Low likelihood of serious outbreak of the economically important livestock diseases like RVF;
- Short-cycle October to December seasonal crops and off-season crops will be harvested early in this quarter;
- Near normal rainfall conditions during the main *msimu* cropping season in Tanzania, but food prices are likely to rise as the first quarter is the lean season;
- Market prices likely to remain above recent five-year average but likely below 2008 levels;
- Conflict and insecurity likely to remain an issue, particularly in Somalia and southern Sudan, and other insecurity-affected areas.

Figure 5: Most likely food security scenario, January-December 2009)



Source: *FEWS NET*

In the most likely food security scenario during the January to March 2010 period, positive residual effects of the expected near normal to above normal October-December rains will benefit household food security among most pastoral and marginal agricultural production livelihood groups throughout the season, which is usually dry and harsh. The possibility that some rains will be received into January (IRI and ECMWF forecasts) also raises prospects for short-cycle crops usually harvested in January-February in south-central Somalia, southeastern Ethiopia, and Kenya's southeastern marginal cropping areas, which have had three to four successive poor seasons. Off-season croppers are also likely to benefit from these positive effects of the El Nino rains. Livestock body conditions and milk production (among the few livestock that will be in milk) will have improved, increasing prospects for better prices and some milk availability to support child nutrition. Better prices for livestock will likely not significantly benefit poorer households who may not have sufficient stocks to sell, particularly following the drought conditions that decimated some of the livestock. Despite the positive effects, as stated earlier, full recovery among pastoral groups will require several good seasons. Agropastoralists and marginal crop production livelihoods are likely to obtain near normal harvests, unless pests and diseases (which are more prevalent during seasons when the rains are heavier) jeopardize these prospects.

In Tanzania, where the rains in the first quarter of the year are most important for the maturity of the main *msimu* crop, the January to March period is usually the lean season, particularly in the unimodal southcentral and western parts of the country. According to Tanzania Meteorological Agency and ECMW forecasts normal seasonal conditions are expected to prevail during this period, which would lead to a substantial reduction in the number of food insecure.

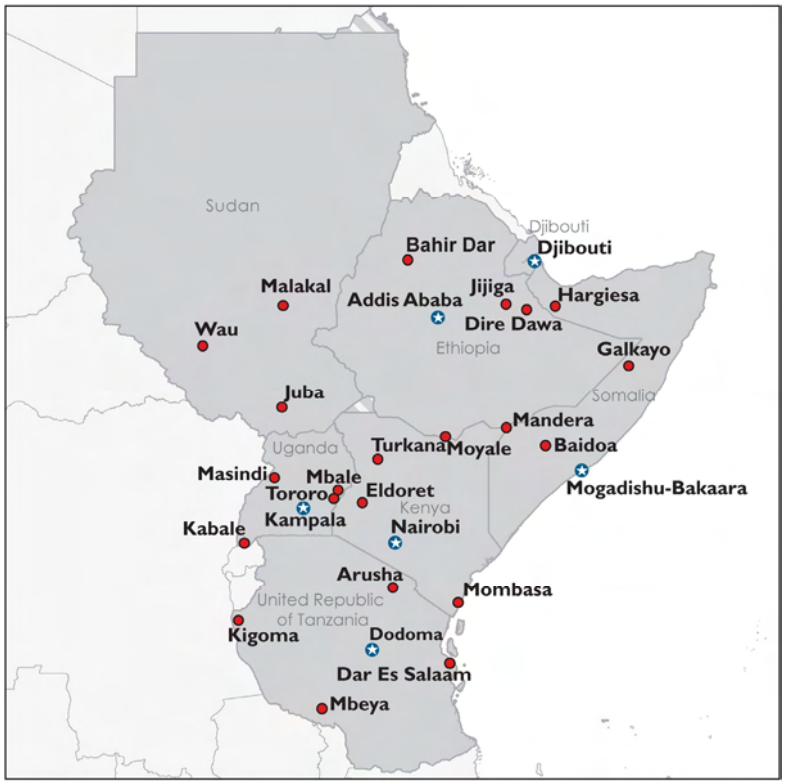
In the high potential cropping areas (such as *meher* areas of Ethiopia, the western breadbasket areas of Kenya, Sudan, and parts of Uganda), the food security situation is expected to be near normal at least for the January to March season due to expected harvests in the last quarter of 2009. Since the main harvests this year are expected to be below normal, the benefits to food security may not last beyond the first quarter of 2010. Specifically for Ethiopia, because of the poor performance of the July-September season, which is the main season, there is likely to be a faster deterioration in the food security conditions.

As in the current food security conditions and previous food security scenario, both civil insecurity/conflict and staple food prices are unlikely to change significantly and will continue to be a constraint in the worst affected countries. Insecurity/conflict will continue to affect market access due to insecurity on the roads, disrupted humanitarian access and potentially high population displacement, which could undermine food security. Overall, the food security conditions in the January to March period is not likely to change significantly and similar numbers of people may continue to face food insecurity; in some countries such as Ethiopia, where the 2009 crop production has been poor, a deterioration in the food security situation is expected in the first quarter of 2010.

Table 1: 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— *(southeastern Ethiopia, northeastern Kenya, and south - central Somalia & Northeastern Uganda* and Marginal agricultural areas *(South-eastern lowlands and northeastern border area of Tanzania)*	• October-December rains are below normal	• Water and pasture shortage. Livestock currently in distant grazing grounds do not return and reducing the availability of animal proteins	Very unlikely	Rainfall totals and distribution for the October–December season
		• Reduced cultivated area and yield resulting in low agricultural production.	Unlikely	Rainfall totals and distribution Staple crop production
Tanzania	• Prices of food commodities decline to 5-year average levels	• improved access to food among poor market-dependent households	Unlikely	Food prices
Somalia, northern Kenya, southeastern Ethiopia, southern Sudan and northeastern Uganda	• civil insecurity and conflicts subside significantly/sufficiently so as not to be a major food insecurity driver	• significant strengthening of the affected populations coping ability; • resettlement of displaced groups; • improved access to conflict-restricted markets and productive resources	Unlikely	Conflict/insecurity incidences; Human displacement

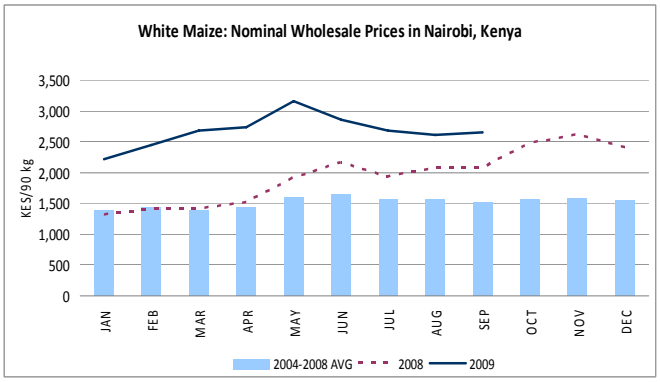
* Probability levels	Description
Unlikely	Could occur in the time period if conditions changed moderately
Very unlikely	Could occur in the time period if conditions changed significantly

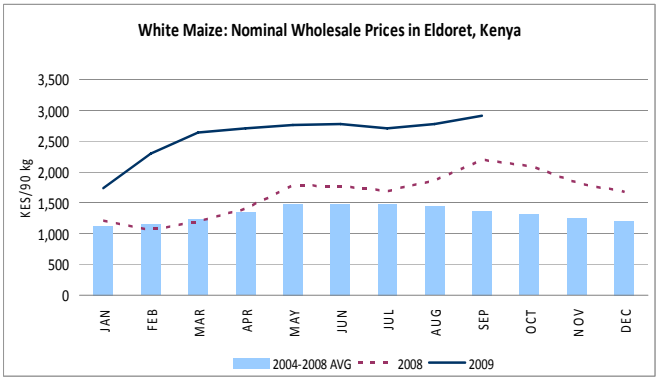


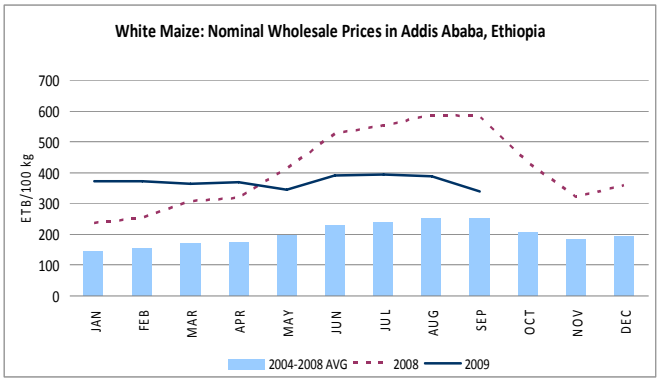
Monthly prices are supplied by FEWS NET enumerators and a range of partners: in Ethiopia, the Central Statistics Agency and FEWS NET; in Kenya, the Ministry of Agriculture (Market Research Branch); in Uganda, the Uganda Market Information System; in Tanzania, the Ministry of Trade, Industries, and Marketing;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

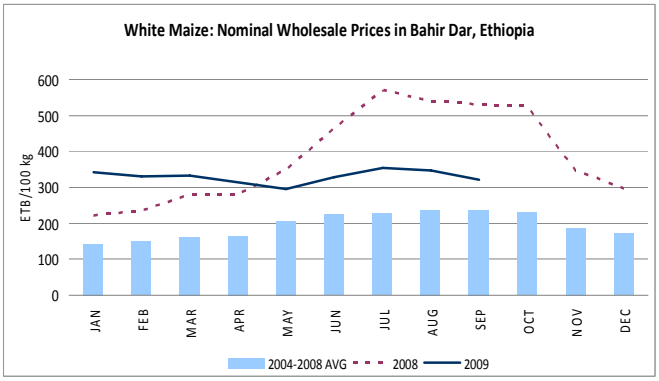
White maize is the main staple grain consumed in Tanzania, Kenya, and Ethiopia. In Uganda, white maize is grown mainly as a commercial crop for export in the region. Imported rice is a major staple for Djibouti and Somalia, which mainly consume *belem*—the imported red rice. Tanzania is also a major 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.

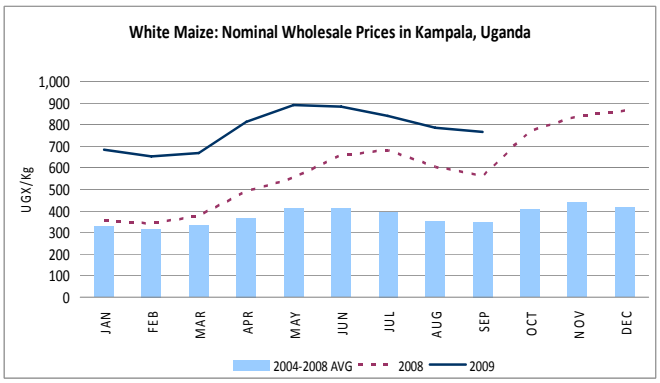
WHITE MAIZE: The markets below represent the major producer and consumer markets in countries where white maize is heavily consumed as the staple.






White Maize: Nominal Wholesale Prices in Addis Ababa, Ethiopia
ETB/100 kg
700
600
500
400
300
200
100
0
JAN FEB MAR APR MAY JUN JUL AUG SEP OCT NOV DEC
2004-2008 AVG
2008
2009


White Maize: Nominal Wholesale Prices in Bahir Dar, Ethiopia
ETB/100 kg
600
500
400
300
200
100
0
JAN FEB MAR APR MAY JUN JUL AUG SEP OCT NOV DEC
2004-2008 AVG
2008
2009


White Maize: Nominal Wholesale Prices in Kampala, Uganda
UGX/Kg
1,000
900
800
700
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500
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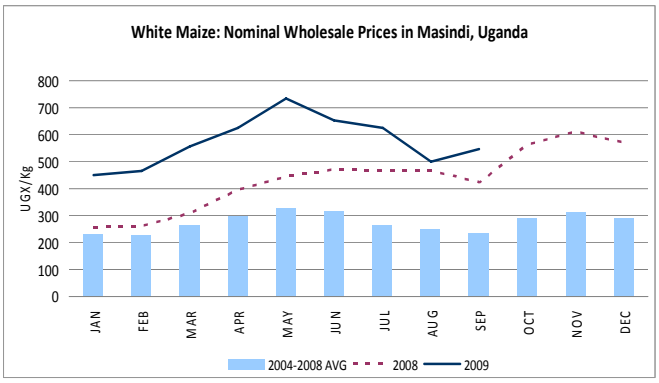
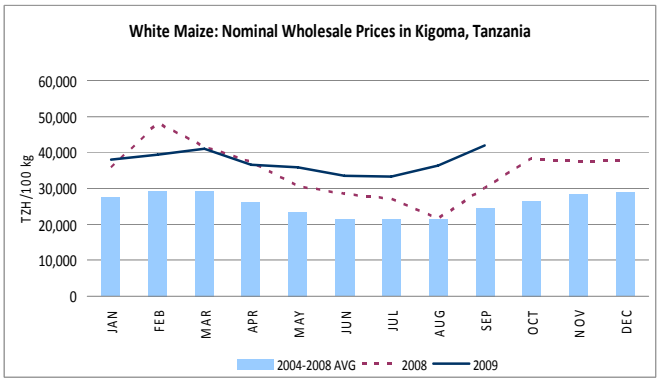
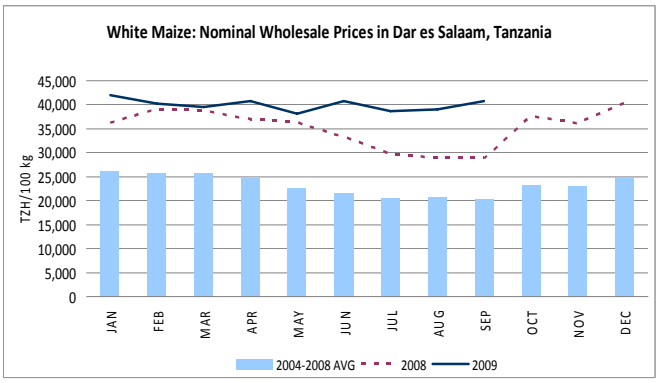
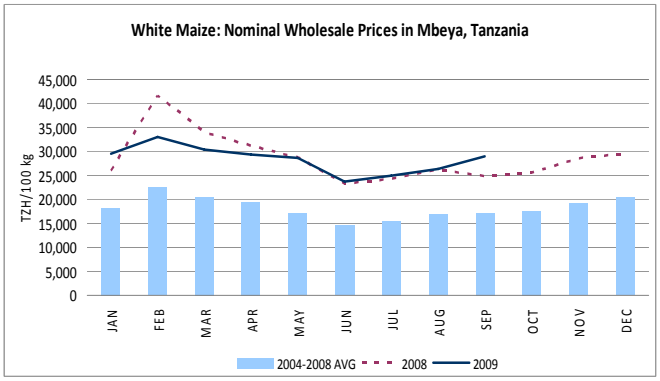
200
100
0
JAN FEB MAR APR MAY JUN JUL AUG SEP OCT NOV DEC
2004-2008 AVG
2008
2009


White Maize: Nominal Wholesale Prices in Masindi, Uganda
UGX/Kg
800
700
600
500
400
300
200
100
0
JAN FEB MAR APR MAY JUN JUL AUG SEP OCT NOV DEC
2004-2008 AVG
2008
2009


White Maize: Nominal Wholesale Prices in Kigoma, Tanzania
TZH/100 kg
60,000
50,000
40,000
30,000
20,000
10,000
0
JAN FEB MAR APR MAY JUN JUL AUG SEP OCT NOV DEC
2004-2008 AVG
2008
2009


White Maize: Nominal Wholesale Prices in Dar es Salaam, Tanzania
TZH/100 kg
45,000
40,000
35,000
30,000
25,000
20,000
15,000
10,000
5,000
0
JAN FEB MAR APR MAY JUN JUL AUG SEP OCT NOV DEC
2004-2008 AVG
2008
2009


White Maize: Nominal Wholesale Prices in Mbeya, Tanzania
TZH/100 kg
45,000
40,000
35,000
30,000
25,000
20,000
15,000
10,000
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JAN FEB MAR APR MAY JUN JUL AUG SEP OCT NOV DEC
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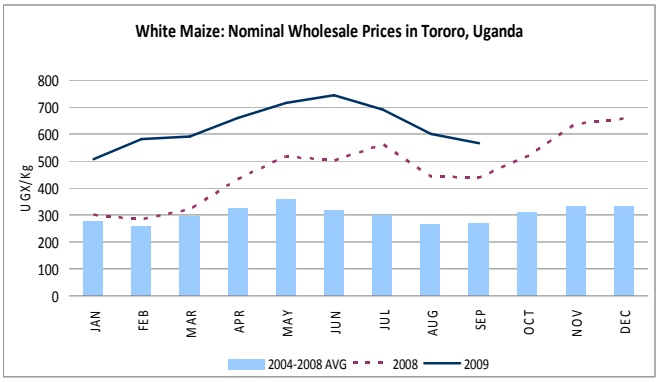
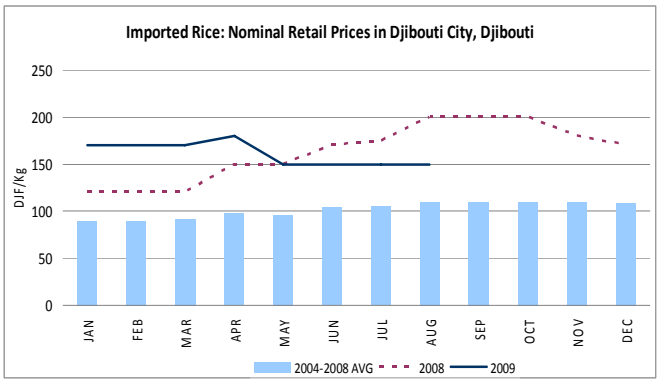
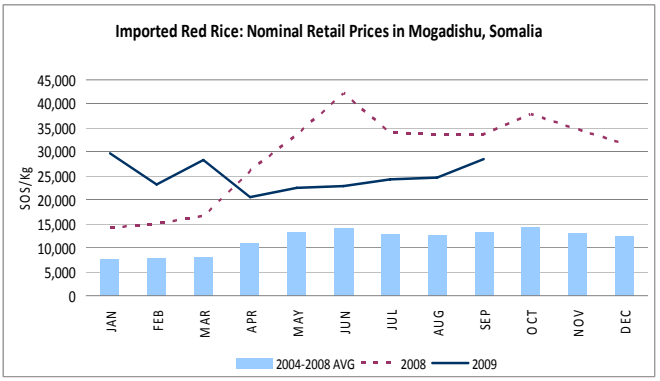
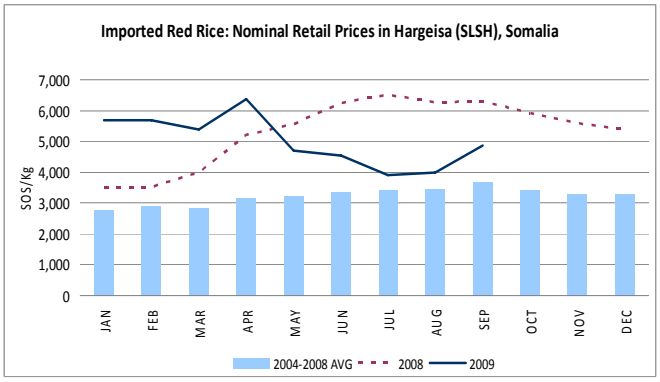
2008
2009

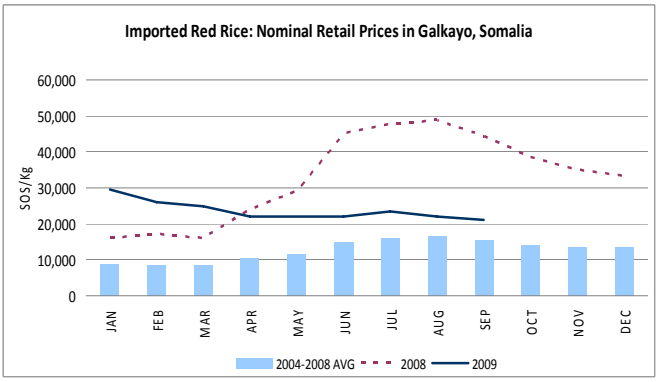

White Maize: Nominal Wholesale Prices in Tororo, Uganda
UGX/Kg
800
700
600
500
400
300
200
100
0
JAN FEB MAR APR MAY JUN JUL AUG SEP OCT NOV DEC
2004-2008 AVG
2008
2009

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

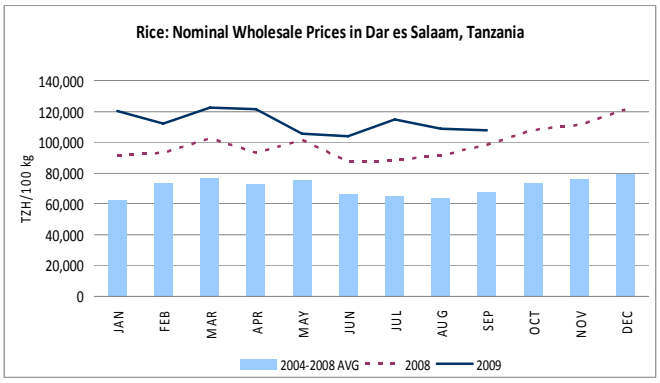


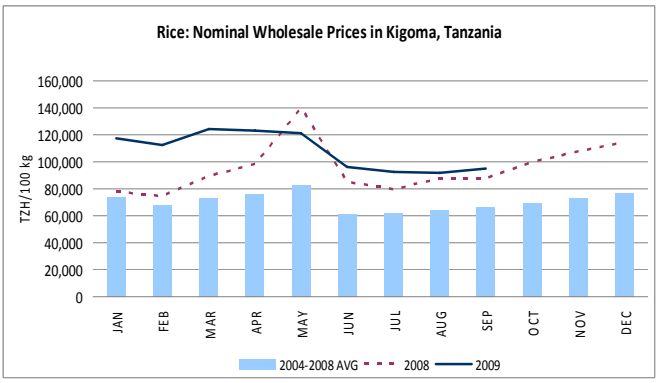




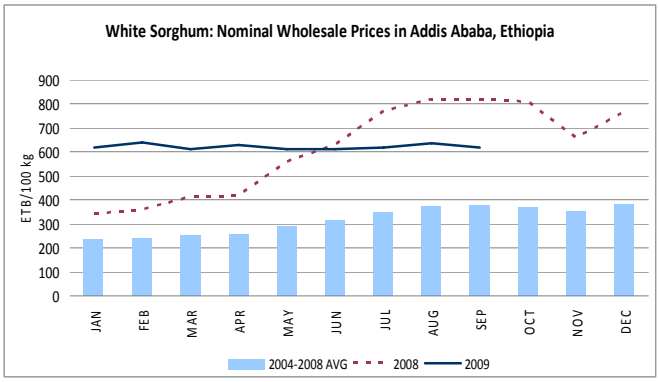


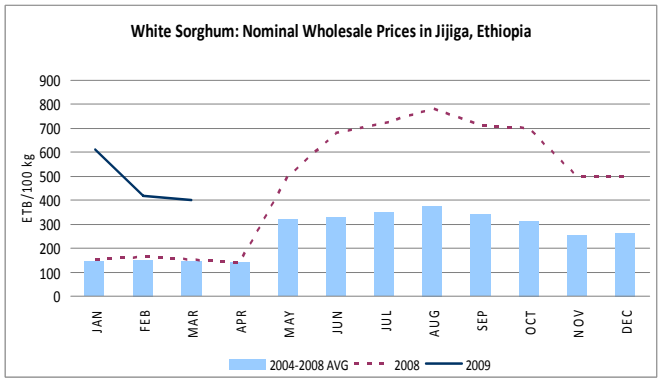
LOCAL RICE: Local rice is produced mostly in Kenya, Uganda and Tanzania. With the exception of Tanzania, most countries in the region are net importers of local rice, which has high demand in urban areas.

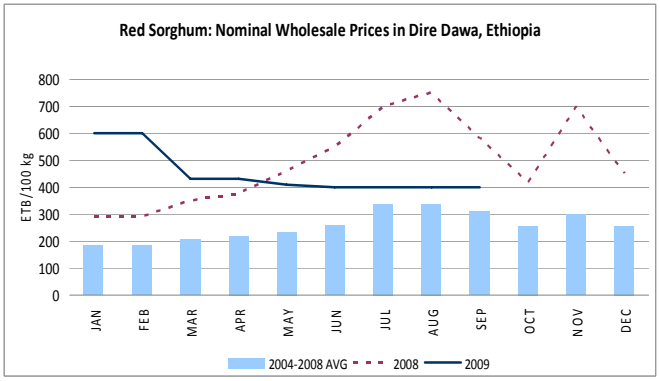


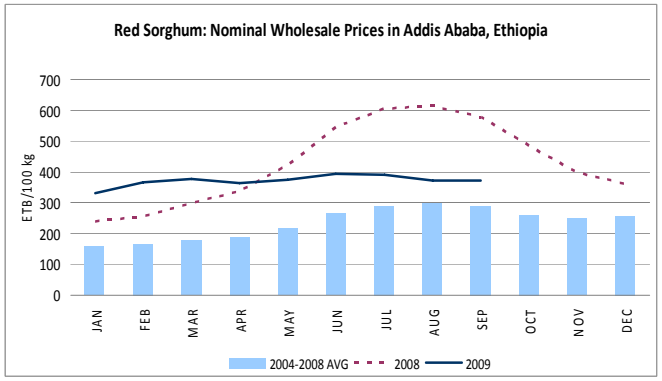


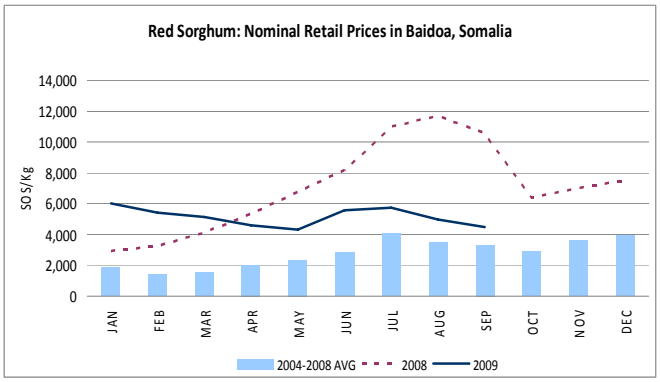
RED AND WHITE SORGHUM: Sorghum, both red and white, is an important consumption and production staple for many households in the region. These markets demonstrate the variety of places it is produced and consumed.

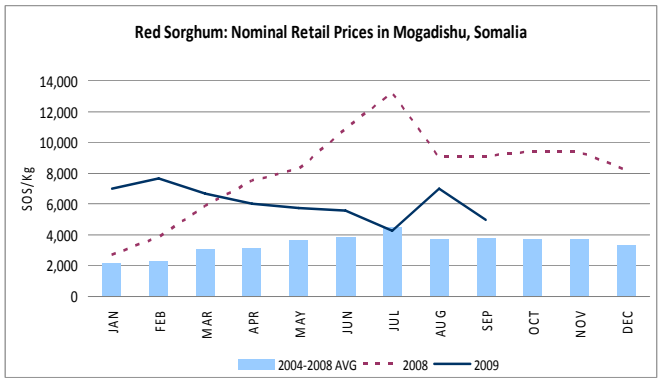


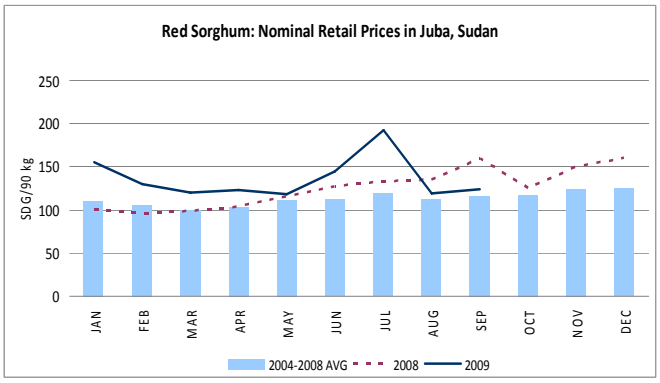


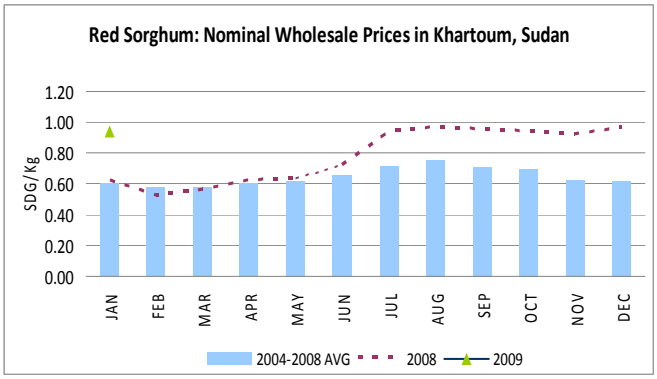


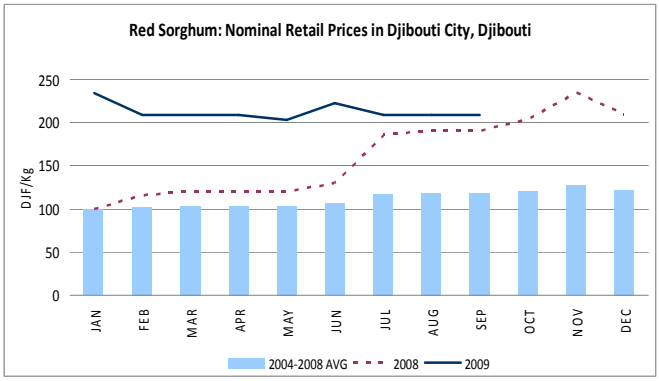


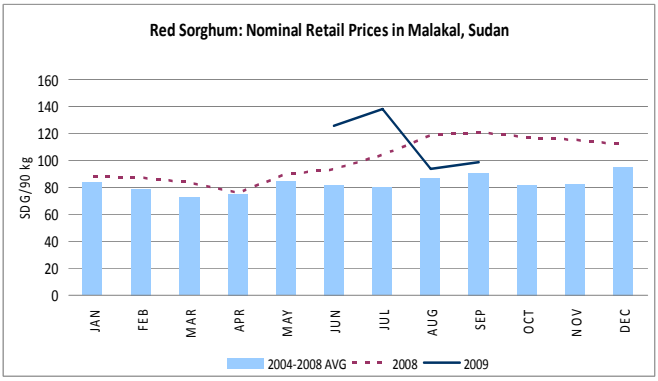




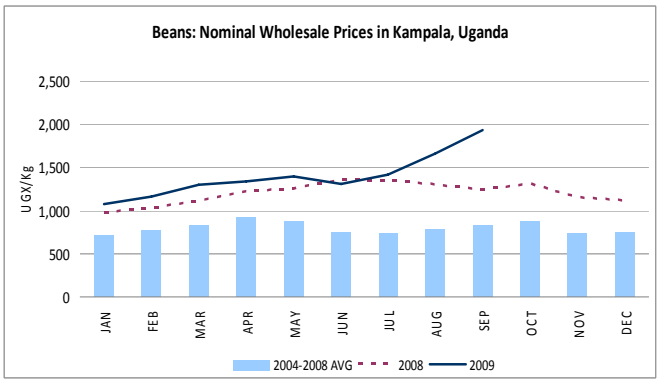


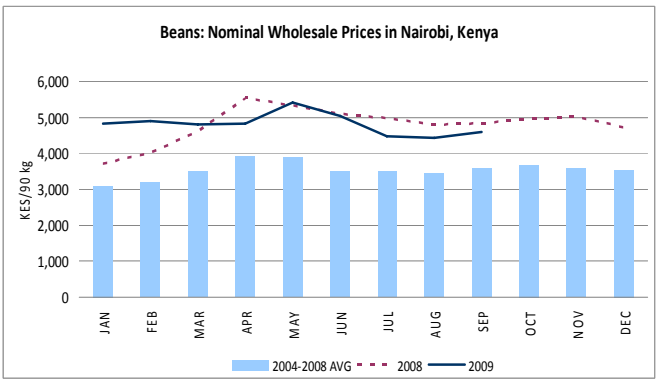


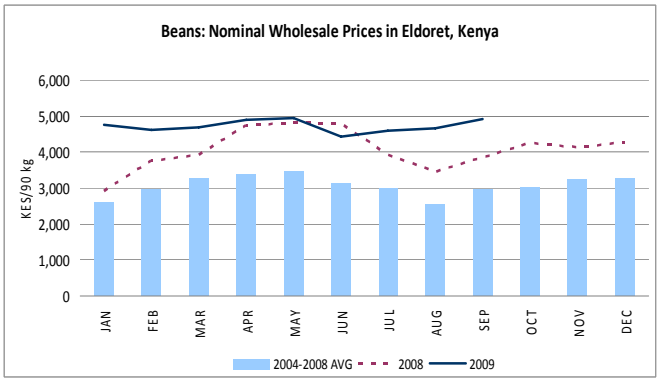


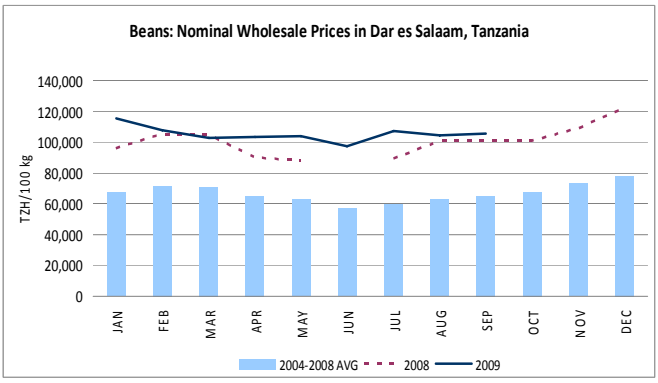


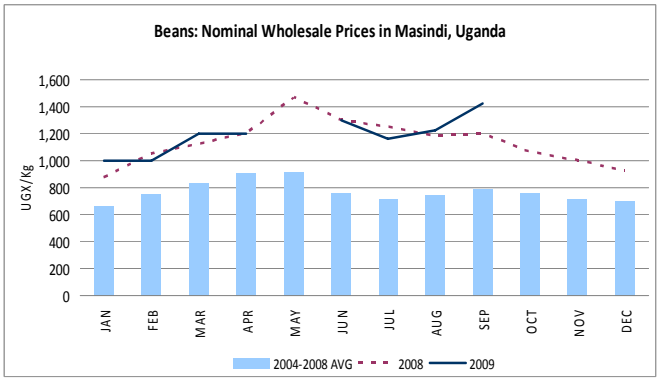
BEANS: Beans are a primary protein source throughout the region, especially in Kenya, Uganda and Tanzania. It is also a staple food in northern Sudan as well as in Rwanda and Burundi. These represent the capital city markets in Kenya, Uganda and Tanzania as well as the main production areas.

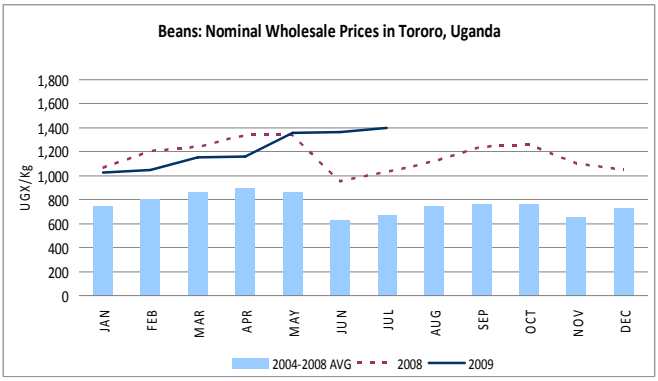


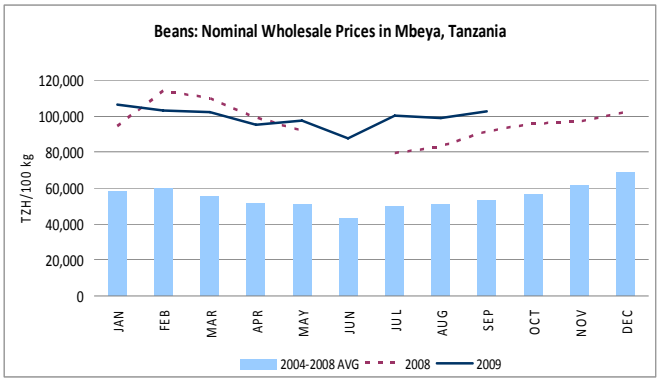


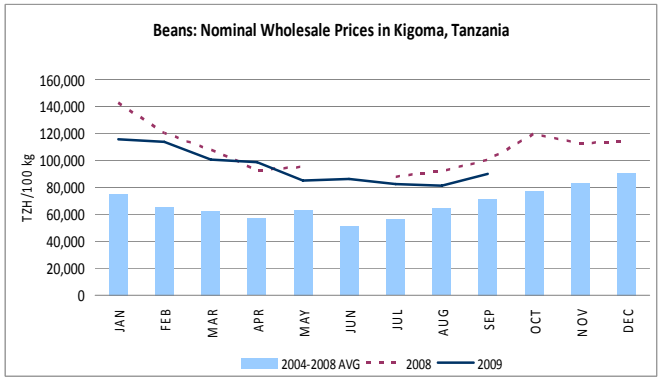
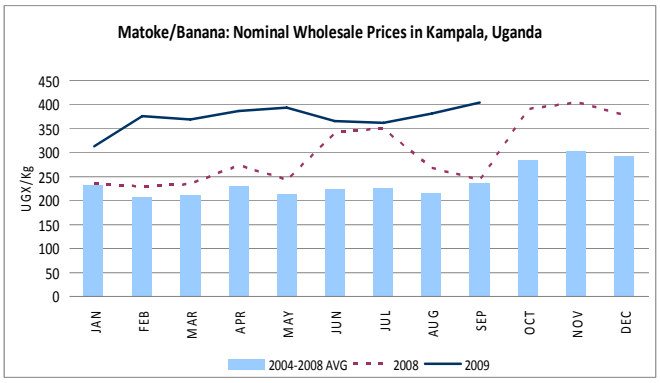
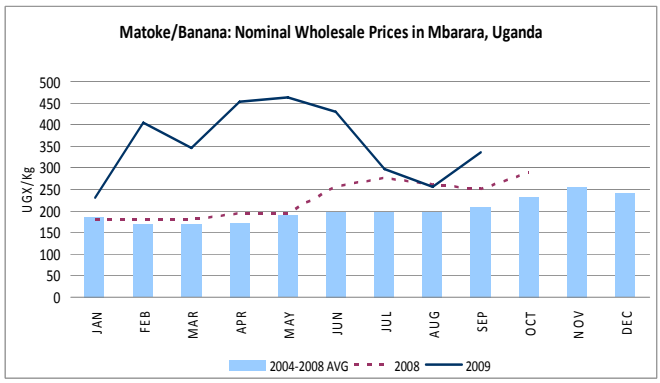












MATOKE/BANANA: These are the wholesale and retail prices for matoke, cooking banana, in the capital city market of Uganda.