

## EAST AFRICA Food Security Brief\*

January 2012

### *Food security outlook points to deepening food insecurity in some areas even as October-December rains result in marked improvement in Crisis areas*

Current food security conditions and expected outcomes during the Outlook period (through March 2012) are mixed across the East Africa region. Several areas previously at Crisis levels of food insecurity (IPC Phase 3) have shown considerable improvement, namely parts of Somalia, Ethiopia, and Kenya, following favorable and mostly above normal October-December rains, coupled with a major humanitarian response. Notwithstanding these improvements, the outlook in the eastern Horn is measured, due to the underlying fragility of livelihoods, which have been weakened by a succession of poor seasons and multiple shocks, principally drought, conflict, livestock disease, above-normal food and non-food prices, and more recently, floods. Furthermore, most of the improvements in food security are supported by humanitarian response rather than substantial recovery in productive capacities or enhanced resilience of livelihoods. Blue Nile and South Kordofan states in Sudan, and Jonglei State and border areas of South Sudan, are now emerging as the areas of greatest concern, in addition to parts of southern Somalia. Food insecurity in Sudan and South Sudan is driven by the poor recent agricultural season, and intense conflict and heavy fighting in some areas, as well as restrictions on trade and humanitarian access.

Food security has improved in parts of Kenya, Ethiopia, Rwanda, Uganda, and Somalia, and the prognosis for the first quarter of 2012 is generally favorable. However, reports by FAO suggest that food security in **Djibouti** is anticipated to decline through March particularly for pastoralists, the urban poor, and about 19,000 Somali and Yemeni refugees in camps. An estimated 210,000 people will face Stressed levels (IPC Phase 2), while localized households in the north will face Crisis levels. In western **Ethiopia**, food security is projected to improve to No Acute Food Insecurity (IPC Phase 1) in parts of the cropping highlands after favorable October to December rains. However, *Belg* cropping areas in North Wollo and northeastern parts of Afar experienced poor rains and poor households will likely remain in Crisis through March 2012. Households in the southern and southeastern pastoral and agropastoral areas of Ethiopia bordering Kenya, South Sudan and Somalia are expected to be in Crisis through March 2012, including about 143,000 Somali refugees at Dollo Ado camp and more than 30,000 Sudanese refugees in Benishangul-Gumuz region in western Ethiopia. Insecurity and suspected polio cases are cause for serious concern in Dollo Ado, while water shortages are increasing in Oromiya and Somali regions.

Pastoral households in southern and northwestern **Kenya** will be at Stressed levels and many in the northeast (impacted by insecurity) at Crisis levels through March 2012, a significant improvement from the Emergency level (IPC Phase 4) in November 2011. Most livestock remain in wet-season grazing areas and livestock prices are up to 150 percent higher than the five-year average in markets such as in Samburu and Laikipia. However, rains ended early in parts of the marginal agricultural lowlands and crop losses have occurred in some areas. Harvests in February should improve household food supply although the domestic supply will begin to tighten much earlier than normal in May 2012, due to low carryover stocks coming into the July 2011-June 2012 production season.

Food security is anticipated to strengthen in **Rwanda** following a succession of good seasons. Cereal output is 65 percent higher than the five-year average and many households are likely to be in the No Acute Food Insecurity phase. However, poor and market-dependent households will remain at Stressed levels through March 2012, due to heightened food and non-food prices that are compromising purchasing capacities. Most households in **Uganda** will be at No Acute Food Insecurity levels through the Outlook period. However, households in northern Uganda will remain Stressed principally due to the impacts of Lord's Resistance Army (LRA)-related insecurity, which is impeding trade and production.

The food security prognosis for **Somalia** points to significant improvements through March 2012, attributed primarily to

\* Throughout January, FEWS NET has been in transition to a new five-year phase of the contract. As our staff focus on the administrative and logistical aspects of establishing new offices and mobilizing new staff, FEWS NET is producing abbreviated regional reports this month focusing on the key areas of concern. Regular reporting will resume in February with the publication of our Outlook reports.

*The Famine Early Warning Systems Network (FEWS NET) issues alerts to prompt decision-maker action to prevent or mitigate potential or actual food insecurity. The views expressed in this publication do not necessarily reflect the view of the United States Agency for International Development or the United States Government.*

good *Deyr* rains and on-going humanitarian assistance. Most parts of the previously famine-affected regions of Shabelle and Bay are now at Crisis or Stressed levels. The pressure on household purchasing capacities has eased significantly – a kilogram of white maize in Qorioley in Lower Shabelle is retailing at about 5,000 Somalia Shillings compared to 17,500 in June 2011 at the peak of the crisis. The decline is attributed to increased food supply from on-going harvests and humanitarian assistance. However, serious concerns persist, especially in the Riverine livelihood zones in Juba Valley, the Coastal Deeh livelihood zone, and among Juba cattle pastoralists who face Emergency conditions that could intensify through the May-June lean season. Food security for up to 1.8 million people in southern Somalia, situated in areas controlled by Al Shabaab, could sharply decline in the coming months, due to the lack of or declining access to humanitarian assistance to some groups. On-going military operations by Ethiopian and Kenyan armies in southern Somalia are also anticipated to interrupt production and market activities, impeding consolidation of the recovery process. The May to June lean season is likely to expose vulnerability of livelihoods that are emerging from Emergency and Famine (IPC Phase 5) levels, unless humanitarian assistance continues and livelihood resilience is strengthened. Results from the post-*Deyr* assessments are expected toward the end of the first week of February and should provide more detail.

In **South Sudan**, the provisional 2012 Annual Needs and Livelihood Assessment (ANLA) estimates that the size of the food insecure population – 1 million people at Crisis levels and 3.7 million people at Stressed levels – is set to rise in the coming months due to a below-average 2011/2012 harvest, the impacts of conflict in many areas, and dramatic food and non-food price increases. An estimated 11 percent rise in the number of people in the Stressed phase since December points to rapidly deteriorating food insecurity. A large 470,000 MT cereal deficit has deepened household food insecurity especially in Upper Nile, Warrap, parts of Unity, Northern Bahr el Ghazal and Jonglei, where production has been poor. Disruption in trade between South Sudan and Sudan, due to the ongoing trade blockade from Sudan, continues to heighten prices of key commodities. Prices of white sorghum and wheat flour in the border market of Malakal are 230 and 120 percent higher than the 4-year averages, respectively, and are 80 percent higher than in 2011 in southern areas including Juba, Bor, and Rumbek. Over 40 percent of the rural population are now allocating up to 65 percent of their household income to food, up from 25 percent one year ago, according to the ANLA.

The livelihood analysis forum of **South Sudan** anticipates that food insecurity will deteriorate to Crisis levels through March for populations bordering Sudan, including parts of Northern Bahr el Ghazal, Warrap, Upper Nile, northern Jonglei, Unity, and Western Bahr el Ghazal, due to military activities exacerbated by trade restrictions. In addition, over 600,000 highly vulnerable and resource-poor people are returnees or displaced. Food insecurity is also anticipated to decline to Crisis levels through the first quarter of 2012 in pastoral areas of Eastern Equatoria, because of impacts of severe depletion in grazing resources. The outlook for pastoralists is worsened by probable disease outbreaks which have put nearly 2.7 million livestock at risk, underlining multiple threats that South Sudan is facing in the coming months. However, good March-May rains (projected by ECWMF) in most of South Sudan could moderate expected deepening food insecurity.

An estimated 4.2 million people in **Sudan** are likely to be in the Stressed, Crisis, and Emergency phases during the first quarter of 2012, up from 3.3 million people in December 2011. Areas likely to be in the Emergency phase are situated in Blue Nile and South Kordofan, attributed to restricted humanitarian access to IDPs and constrained trade to these areas. The unfavorable outlook is precipitated by a poor agricultural season, conflict in Southern Kordofan and Blue Nile states, crop damage by migrating livestock in Eastern and Central Sudan and Northern Darfur, and an unprecedented 2012 import requirement of 2.9 million MT. Only 2.9 million MT of cereal output is anticipated, less than half of the 2011 harvest – about 60 percent of the 5-year average – resulting in rapid stock depletion. Already sorghum and wheat prices have risen by about 30-65 percent, especially in Khartoum and the conflict-affected areas in Darfur. Prices are anticipated to rise more sharply through the first half of 2012 as the market tightens. Yet financing to facilitate food imports will be constrained by reduced revenues from oil, suggesting that food prices could be prohibitive for the food insecure population.

Evidently, substantial food insecurity concerns have persisted and new ones are emerging, expected to carry into at least the first quarter of 2012. While cumulative October-December rains were generally favorable and substantial improvements have occurred in Crisis areas of the East Africa region, several factors are moderating the recovery process. Conflict, constrained access to humanitarian assistance, rising food and non-food prices and an upsurge in livestock disease are dampening the food security prognosis for 2012.