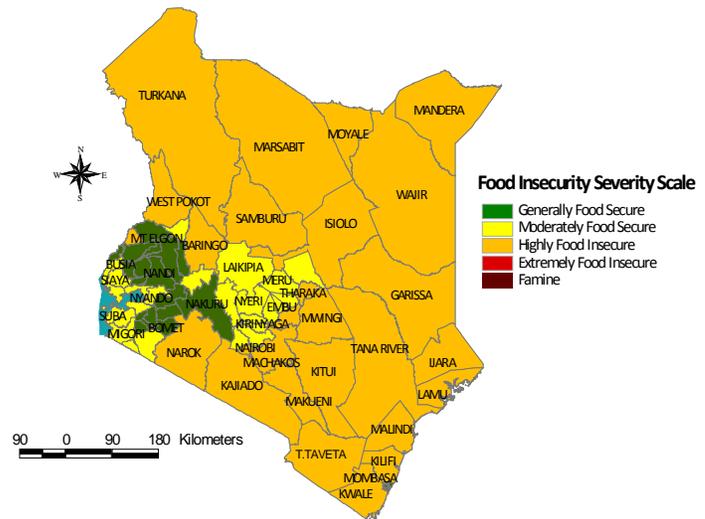


KENYA Food Security Outlook

July to December 2009

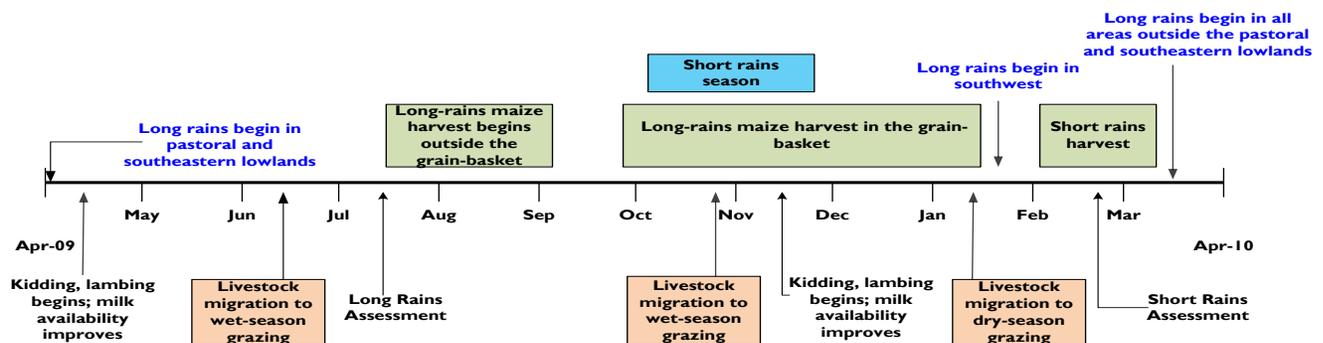
- The current food security situation remains highly precarious. The failure of the long rains in the southeastern marginal agricultural lowlands and several parts of the pastoral and agropastoral areas has caused substantial decline in both crop and livestock production. In addition, unrelenting high cereal prices, conflict, and limited implementation of planned interventions have accentuated food insecurity.
- The most likely scenario between July-September points to worsening food insecurity in the southeastern and coastal lowlands as well as in many pastoral areas, where rains have largely failed. Fair maize production in the Rift Valley, and Western and Nyanza highlands is unlikely to cause a significant reversal in high prices or food insecurity for the worst-affected households. The onset of the next season is more than three months away.
- The most likely scenario between October and December will likely be significant improvement in food security in the worst affected areas, toward the end of the quarter. If the short rains are normal or enhanced from a probable El Niño event, milk availability should improve as would the supply of short-cycle crops. The main maize harvest occurs during the last quarter and would invariably lead to increased domestic supply and some reduction in maize prices.

Figure 1. Current estimated food security conditions, July 2009



Source: FEWS NET

Seasonal Calendar and Critical Events



Current food security conditions

Most marginal agricultural, agropastoral, pastoral, urban, and internally displaced households remain highly food insecure. The failure of the long rains in the **southeastern and coastal marginal agricultural lowlands**, in particular, has brought about precarious food security conditions. The Ministry of Agriculture (MoA) reports that close to 80 percent of the long-rains crop — which contributes about 30 percent of output in the lowlands — has failed. The failure of the long rains in the southeast is likely to widen the national structural deficit in the key staple, maize. The constrained supply of maize has sustained record prices that have severely affected the purchasing capacities of vulnerable households. While the long-rains season is not necessarily the most critical, the successive failure of three seasons has deepened household food insecurity. The MoA has revised expected maize production downward to 2.16 million MT, just over 20 percent lower than the short-term average.

Food and non-food interventions proposed after the failure of the more important short-rains season have not been implemented due to lack of resources. While some food interventions have been implemented, the WFP food pipeline is significantly under-resourced, in part because of contract cancellations due to the rise in maize prices. Of equal concern is the absence of proposed non-food interventions that would have mitigated growing food insecurity while strengthening the capacities of households to withstand shocks and hazards, such as the failure of the current long-rains season.

Currently, maize and bean prices are up to 170 percent higher than normal in the southeastern lowlands. Livestock body conditions and productivity are also declining markedly, as trekking distances extend to up to 20 km in search of water and pasture. The price of livestock, especially cattle, is up to 20 percent lower than the 5-year average in the coastal lowlands. Scarcity of water has caused the price of a 20-litre can to rise from Ksh. 20 to 60, and hygiene is being compromised due to the inability to meet either food or water purchases. Cholera incidences are being reported by the Ministry of Health in parts of the lowlands. Coping strategies — most notably charcoal production — have continued over a period of two years and are now viewed as a livelihood strategy, notwithstanding the devastating impacts on the environment. An estimated 1.1 million persons are highly food insecure in the southeastern and coastal marginal agricultural lowland districts of Mwingi, Makueni, Machakos, Kitui, Tharaka, Mbeere, Meru North, Kwale, Kilifi, Malindi, and Taita Taveta.

Failure of the rains in **pastoral areas** outside eastern and southern Garissa, southern Wajir, western Mandera, northwestern Marsabit, border areas of Moyale, western and southern Samburu, and coastal areas of Tana River districts, have also culminated in rapid deterioration of livestock body conditions and productivity. The worst affected are pastoralists in Marsabit, Isiolo, Tana River, Samburu, Kajiado, Wajir and parts of Mandera, Garissa, and Narok. Pastoralists migrated out of their normal wet-season grazing areas in the middle of the season and others did not return to wet-season grazing areas after it became clear that rains had failed in several areas. Livestock have clustered where there are good grazing resources, while other pastoralists have taken their livestock into Somalia, Ethiopia, southern Sudan, and Uganda. The lengthy trekking distances have taken a toll on the body conditions of the livestock, as well as their productivity, as they journey up to 40 kilometers for water and graze. Most affected are the less resilient cattle and sheep, resulting in mortalities in Marsabit, Kajiado, Isiolo, and Tana River districts. Pastoralist terms of trade have assumed a downward trend as livestock prices are up to 40 percent lower than 5-year averages in the worst-affected areas, while cereal prices remain over 130 percent of average. Since it is no longer profitable to purchase livestock for re-stocking or resale, due to the anticipation of an extended dry season into October, markets are oversupplied and prices for live animals are lower than normal.

Conflict has moderated likely improvements in the northwestern pastoral areas, which had a better season than the eastern and southern pastoral areas. The worst-affected are Turkana, Samburu, Marsabit, West Pokot, and Marakwet. Lives have been lost, livestock stolen, and markets closed down while 'fall back' dry season grazing areas are inaccessible. As a result, pastoral production in significant areas of the northwest is currently not viable because pastoralists have been displaced by conflict. In addition, rates of child malnutrition from the Arid Lands and Resource Management Project's (ALRMP's) surveillance data shows higher than normal rates across the pastoral livelihood. In particular, MUAC rates in Kajiado, Samburu, Isiolo, and Garissa districts are higher than average by margins ranging from 20-30 percent. An estimated 1.4 million pastoralists and agropastoralists are currently highly food insecure.

Internally displaced persons (IDPs) who suffered the upheavals of the post-election crisis remain highly food insecure. Initially, an estimated 600,000 persons were displaced; 350,000 in camps and 250,000 integrated with family immediately in the aftermath of the post-election crisis. Currently, an estimated 40,000 remain in transit camps close to their homes, mostly in the Rift Valley highlands; many farm their lands during the day while returning to the camps at night, while less than five percent have purchased new lands and relocated. About five percent remain in original camps; these are mostly former small traders and hawkers, rather than farmers. While an estimated 80,000 new homes were planned, only 7,000 have been built. According to a KFSSG assessment conducted in May, the majority of the farmers received maize seed sufficient to sow one acre, but no seeds were provided for the faster-maturing potatoes and vegetables. Most IDPs in transit camps need to walk up to eight kilometers to and from their farms: distances that impede their ability to use their time engaged in productive activities. In general, there is a shortage of food in the camps, as GoK food distributions are largely intermittent. Prospects for improved household food security from the harvest are determined by the likelihood that the harvest will quickly deplete. Overall production is low because cultivated hectareage is low and little or no fertilizer is used.

Both original and transit camps face significant challenges: lack of sufficient sanitation; shortage of teachers for children; predisposition for undesirable coping strategies such as prostitution, which contributes to the proliferation of HIV/AIDs; and the use of wood fuel for cooking, thus accelerating environmental destruction. While tensions and suspicions remain in most areas affected by the post-election crisis, exceptions exist, such as in parts of Uasin Gishu district, where neighbors have given former IDPs livestock to contribute to their recovery. Unless a proactive reconciliation effort is carried out with the full support of politicians, resettlement and return may not be tenable in many areas and food insecurity could become entrenched for a significant portion of the displaced.

Food security for **urban households** remains tenuous, despite the marginal drop in prices of short-cycle crops, most notably vegetables. Urban households purchase virtually their entire food basket from the market, suggesting that the sustained higher-than-normal food prices are increasingly untenable for households in the lowest food security category. Although maize remains the overwhelming staple and the main food expenditure item for urban households, a 2-kg packet is retailing at Ksh. 90, which is at least 70 percent higher than the 5-year average. Households have reduced the number of meals and the quantities of food purchased in response to record-high maize and bean prices, since wage rates have remained comparatively static. Severe water shortages are also being addressed through water purchases, further eroding households' abilities to meet food needs. Some 80 deaths arising from cholera have been reported in Mombasa, and could easily spread to other urban centers as sanitation has deteriorated. The short rains are not expected until the middle of October, suggesting continued water shortages. The rising crime rate, particularly in Nairobi, is unprecedented, but it is unclear whether it is correlated with heightening food insecurity.

The onset of the short-rains season is over three months away and no immediate improvement in food security is in sight. On the contrary, food insecurity is likely to deepen from this point forward, through October.

Most-likely food security scenario, July-December 2009

The most likely July-December scenario is premised on several assumptions:

- Seasonal dry weather conditions will persist through mid-October, followed by normal short rains through December.
- Normal rains in the 'grain basket' in July and August.
- No additional reduction to the national long-rains maize output, which is currently 10 percent lower than average.
- Upsurge in water-borne diseases in urban, pastoral and marginal agricultural areas due to growing water scarcity.
- Continued high maize prices into October —the onset of the key harvest in the grain basket — in the highly food insecure urban, pastoral, agropastoral, and marginal agricultural livelihood zones.
- Conflict incidences in the northwest heighten through October, as grazing resources diminish.
- Livestock mortalities rise, as migration options are constrained by depletion of resources and conflict.
- Substantial gaps in food and non-food interventions persist.
- Return of IDPs remains slow due to stuttering reconciliation and rebuilding efforts.

The most likely scenario points to food insecurity worsening through November in the **southeastern and coastal marginal agricultural lowlands**. Failure of the 2009 long-rains season has culminated in the fourth consecutive poor or failed season in the highly drought-prone lowlands. Unfortunately, the exceptionally high food prices are likely to persist through most of the outlook period, since the main harvest in the grain basket begins in October. Current maize prices are over 150 percent higher than the 5-year averages in most lowland markets, which puts pressure on household purchasing capacities.

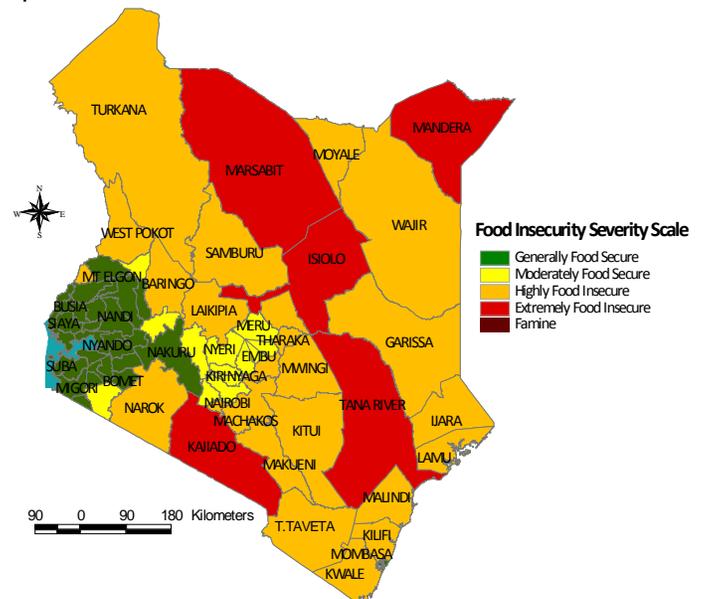
Livestock conditions had already started to deteriorate at the beginning of the outlook period, narrowing the options for improving purchasing capacities to mitigate impacts of the crop failure through the sale of livestock and livestock products. ALRMP's surveillance data suggests that rates of child malnutrition, which are not normally problematic, are rising and are 20 percent higher than 5-year June averages and will likely worsen through most of the outlook period. Coping strategies — including charcoal production, removing children from school and sending them into the labor force, and reducing the number and size of meals — will compromise future food security prospects.

Although 1.1 million persons are included in the World Food Program's and Government of Kenya's food for Assets Program the food pipeline is inadequate and is projected to remain as such through the outlook period. There is no indication that proposed non-food interventions will be implemented, further accelerating the rapid deterioration in household food security. Significant improvements in food security for farm households toward the end of the outlook period are anticipated if the probable El Niño episode occurs. Harvesting of short-cycle crops normally begins toward the end of the final quarter, while livestock begin to kid, lamb, and calve down, increasing milk output. Improved availability of water should also lead to reduction in its price, easing the pressure on purchasing capacities while enhancing sanitation conditions that could minimize the upsurge in waterborne diseases. However, since the main cereal harvest is not expected until February-March 2010, food insecurity in the southeastern and coastal will remain high throughout the outlook period (see Figures 2 and 3).

Pastoralists and agropastoralists in the northeast, northwest, and southern rangelands are likely to witness a severe deterioration in their food security through November. Pastoralists likely to be worst-affected reside in significant areas of Marsabit, Isiolo, Tana River, Samburu, Kajiado, Wajir, and parts of Mandera, Garissa, and Narok districts. Increased livestock mortalities are expected through October as dry conditions persist after poor rains in most of those areas. Pasture, browse, and water, confined to a few localized areas that received good rains, will deplete by the end of August, well short of the onset of the short rains in mid-October, because of unusually early migrations and clustering of livestock. The loss of the sole livestock asset amid cereal prices that are more than 130 percent higher than average is likely to erode the purchasing capacity of pastoralists, which could lead to extreme levels of food insecurity in some areas during July-October (see Figure 2). High cereal prices are unlikely to relent during that period, because the 'grain basket' harvest begins in October. Poor marketing infrastructure, associated with high transaction costs in pastoral areas, is unlikely to facilitate quick transmission of reduced prices arising from increased national supply, even toward the end of the outlook period.

Current trends suggest that proposed food and non-food interventions may not be implemented to an extent that would adequately forestall the downward trend in rates of child malnutrition. ALRMP surveillance data and preliminary output from survey data suggests that rates of children at risk of acute malnutrition have crossed the emergency threshold established by the ALRMP (defined as 33 percent of the population with MUAC<135mm) in the worst-affected pastoral districts and will likely worsen during the first half of the outlook period. Poor nutrition will be compounded by poor

Figure 2. Most likely food security scenario, July to September 2009



Source: FEWS NET

hygiene and an upsurge of waterborne diseases because of growing water scarcity. Pastoralists are already trekking up to 40 kilometers in search of water — distances that will only get longer through October.

The outlook period is likely to witness severe conflict, as competition for resources intensifies. With the exception of northeastern pastoralists adjacent to Somalia, who have access to grazing resources there without inciting conflict, few pastoralists are able to access grazing resources across the borders with Uganda, Ethiopia, and southern Sudan, without precipitating hostilities. Pastoralists probably will, for a short period, remain confined within national borders, grappling with internal conflict and drought. However, as drought accelerates, they are likely to venture into unsafe lands across the border, in the hope that losses arising from cross-border conflict do not outweigh livestock losses that would have occurred if they had remained within national borders. Unfortunately, extended conflict could further decimate livestock holdings and reduce future productive capacities.

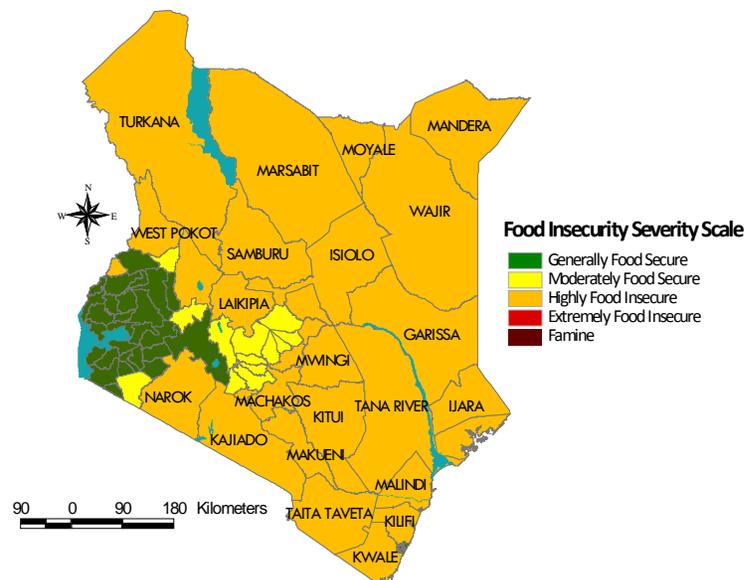
The food security of a significant number of pastoralists in Marsabit, Samburu, Isiolo, Tana River and parts of Mandera and Wajir could decline to emergency status in the absence of widespread and immediate cross-sectoral interventions. Unfortunately, there is no indication that such interventions will be immediately undertaken, suggesting that the numbers of the highly and extremely food insecure are set to rise through most of the outlook period.

However, if the probable El Niño episode occurs, grazing resources could markedly increase, as would livestock body conditions and value, and pastoral food security. Nevertheless if the episode is severe, improvements in environmental conditions and recovery prospects could be impeded by flooding that displaces households; causes livestock mortalities through drowning and disease such as the Rift Valley Fever; and promotes an upsurge in water and vector-borne disease in flood-prone areas.

The number of **urban households** classified as highly to extremely food insecure from a detailed study in 2008 range between 3.5-4.1 million persons. It is likely that the upper end of that range will be valid for the outlook period, because the rise in food prices has been unrelenting and unprecedented. The price of a 2-kg packet of maize flour — the key food purchase for the majority of urban dwellers — is Ksh. 90: 75 percent higher than the 5-year average and likely to remain high at least through November, when the harvest from the grain basket reaches the market. Urban dwellers are facing fairly static wages and rising prices of not just food but also non-food commodities, including water, suggesting that the next three or four months will be particularly difficult and many households could fall into the extremely food insecure category. A number of interventions have been proposed by the Prime Minister's office, including a food subsidy scheme for urban dwellers. At this point, it is unclear how it would be implemented or what the targeted population or benefits would be. In any event, it seems unlikely that it could be implemented across the country's urban areas during the outlook period.

The United States Government (USG) has offered a \$50 million loan facility to private-sector importers to encourage maize and other imports from the United States, so as to increase local supply and dampen maize prices. If the private sector takes up the facility, a significant reduction in maize prices should occur toward the end of the outlook period and mitigate food insecurity. However, importers may be wary of bringing in maize imports close to the harvest season, given the significant lead time that is required for overseas imports, compounded by delays in port operations.

Figure 3. Most likely food security scenario, October to December 2009



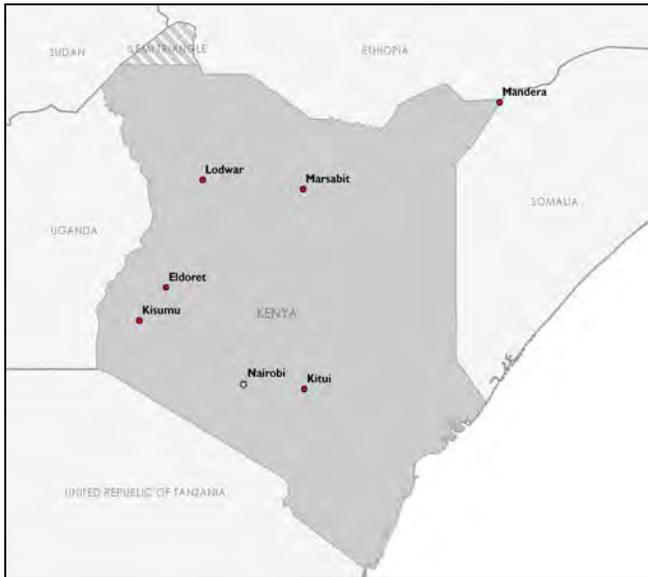
Source: FEWS NET

The food security of **internally displaced persons** is unlikely to significantly improve during the outlook period, in spite of renewed reconciliation efforts intended to facilitate the safe return of IDPs to their bona fide homes. The GoK proposes to provide food for those still residing in transit camps and facing significant shortages. The WFP is planning a seed voucher intervention to promote production of short-cycle crops such as potatoes and vegetables in the early part of the outlook period, and cereals and pulses at the onset of the short rains in mid-October. The GoK also plans to enhance reconstruction of homes for IDPs starting in July, using a Ksh. 1.6 billion grant from the African Development Bank (ADB). Past reconstruction efforts would suggest that intended re-building is unlikely to be achieved during the outlook period. The GOK. The GoK has also renewed an effort to enhance reconciliation through peace rallies, whose results are yet to be clarified. Subsequently, improvements in the food security prospects for IDPs depend on several factors, which would ensure full access by IDPs to their farms, homes, and productive capital.

Table I. Events which could change the most likely food security scenario

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
Marginal agricultural lowlands of the southeast and coast	Food prices decline markedly. Importers take up USG's loan facility, improving domestic maize supply.	Decline in food prices could reduce the pressure on purchasing capacities and reduce the use of undesirable coping strategies that are likely to endanger future production prospects.	Unlikely	Food, livestock, and non-food prices. Price of charcoal.
Pastoral areas in the north, northeast, and northwest	Conflict reduced in the northwest. Livestock prices improve while food prices decline, resulting from a combination of good short rains and improved national supply from harvests and imports.	Improved access to livestock and cereal markets and to favorable grazing areas. Households displaced by conflict return to 'no-go' zones, culminating in an improvement in pastoral production. Improved livestock prices that supersede the rise in food prices could improve terms of trade for pastoralists and, in turn, their food security.	Unlikely Unlikely	Agroclimatic conditions. Conflict incidents. Migrations toward unsafe areas. Livestock and food price trends. Cereal imports. Movement of maize harvests from the 'grain basket.'
Urban poor	Reduction in food prices through improved national supply from harvests and imports. The GoK institutes proposed food subsidy scheme.	Reduction in food and non-food prices would ease the pressure on purchasing capacities of the urban poor, moving the worst-affected households from the extremely food insecure category. Food subsidy scheme would arrest the slide into the extremely food insecure category.	Unlikely Unlikely	Food and non-food prices. Food production in key growing areas. Implementation of GoK policy.
Internally displaced persons	The GoK builds proposed 80,000 homes using financing from the ADB. Proposed inputs voucher scheme and intentioned economic and social interventions are streamlined and implemented systematically.	Former IDPs return to near normal pre-election production levels and return back to their generally food secure status.	Very unlikely Very unlikely	GoK implementation of planned interventions. Progress rebuilding homes process. Area put to crop on IDP farms. Impacts of reconciliation efforts.
Farmers in the grain basket highland areas of the Rift Valley	Poor production in the grain basket as a result of a combination of poor rains through August and heavy rains during harvest.	Food insecurity worsening primarily in deficit areas due to tightened supply and heightened prices.	Very unlikely	Rainfall, hectareage put to maize, input prices and supply, producer prices.

* 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



Maize and beans are the most important commodities consumed, with maize availability considered synonymous with food security. Beans are very often consumed with maize. The Nairobi market is indicative for urban consumers. Eldoret is a producing area and located in the “grain basket zone.” Kisumu is a large market located in a deficit area with marginal agricultural productivity. Kitui is prone to droughts and is a marginal producing area. Lodwar market is located in Turkana, a highly food insecure pastoral district which is poorly integrated with other markets. Manderla is a food insecure area and cross border market with inadequate trade infrastructure. Marsabit is a conflict affected area that is highly food insecure and poorly integrated with other markets.

Monthly prices are supplied by FEWS NET enumerators, local government agencies, market information systems, UN agencies, NGOs, and other network and private sector partners.

