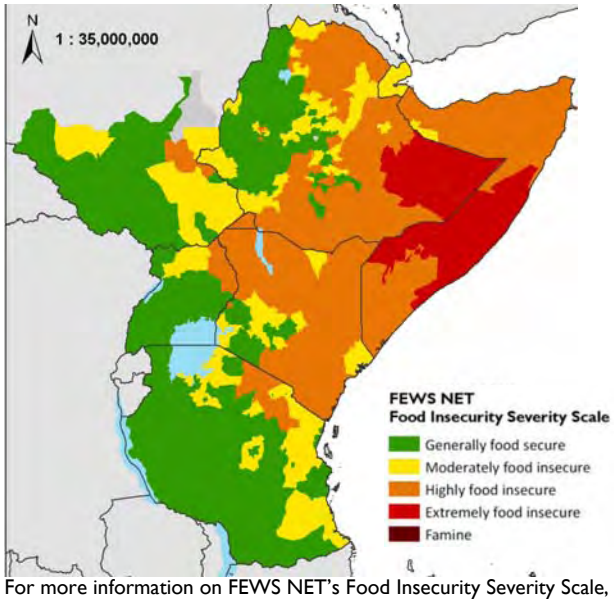
EAST AFRICA Regional Food Security Outlook July to December 2009

- More than 20 million people in the East Africa region are food insecure, due mainly to a combination of the cumulative effects of prolonged drought, which has extended into highly populated areas previously regarded as food secure, and chronic factors related to conflict, poor market access and poor livestock/cereal terms of trade, security-related market disruptions, and trans-boundary animal diseases.

- In the July to September period, rangeland conditions and water availability in pastoral areas and marginal agricultural areas will continue to deteriorate as the present dry season progresses. In consequence, livestock prices will decline, reducing pastoral income. Because of the attendant increase in staple prices due to high demand and increased scarcity of cereals, livestock/cereal terms of trade and access to food will be severely impeded for pastoralists and agro-pastoralists. It is therefore unlikely that high malnutrition rates in the region, such as those reported in south-central Somalia, will decline without wide-scale humanitarian and livelihood protection at this time.

Figure 1. Current food security conditions, July 2009



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

Source: *FEWS NET*

- The food security situation in the October-December period will be driven by the prospect of an El Niño event. Although it is too early to determine the intensity and duration of the expected El Niño event, in the most-likely scenario there will be improved rangeland conditions in the pastoral areas, which could break the cycle of consecutive seasonal failures and allow pastoral livelihoods to recover. In the cropping areas, an El Niño event could result in unseasonal rains that could disrupt the main harvest seasons in Ethiopia, southern Sudan, and Kenya, and could also increase post-harvest losses. Enhanced rains would be beneficial in the bimodal cropping areas of Uganda and Tanzania. An El Niño event would normally be associated with widespread flooding, damage to infrastructure, and an upsurge of water borne diseases.

Current food security conditions

Current food security conditions in the region continue to worsen, especially in the eastern parts of the region dominated by marginal pastoral areas (Figure 1). The consecutive poor rains in these areas have led to poor rangeland conditions in terms of water and pasture, decline of livestock productivity, and steady erosion of the pastoralist livestock assets. Poor rangeland conditions are most evident in southern Kenya and parts of northern Tanzania, spreading into the eastern parts of the Kenya, Central Somali, and the extreme southeastern part of the Somali region of Ethiopia. The poor rangeland conditions in these areas have been associated with high livestock mortality and a decline in livestock prices due to distress sales of livestock and depressed livestock markets. This situation directly affects pastoral incomes as well as terms of trade, as pastoralists are compelled to sell more and more animals at low prices. For instance, cattle prices in Garissa, one of the main terminal markets for livestock from south-central Somalia, declined by 19 percent between May and June. This will affect incomes of pastoralists from the wider catchment in central and southern Somalia, who also depend on this market. .

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Abnormal livestock migrations are also reported from Kenya into Somalia and part of southern Ethiopia due to the poor rangeland conditions. This is likely to increase the potential for resource-based conflicts and also contribute significantly to land degradation in these areas as the current dry season progresses. It is currently the dry season in Somalia and southern Ethiopia, and therefore dry conditions will continue in these areas, which is likely to increase the food insecure population. Current conditions are precarious in the pastoral areas because apart from the poor consecutive seasonal failures, these areas also face problems of poor market access, high staple prices, high malnutrition rates, trans-boundary diseases, and conflicts (both political and resource-based), all of which continue to threaten food security in the pastoral areas. Recent nutrition surveys conducted in Hiran and central Somalia indicate global acute malnutrition rate persistently above the emergency threshold of 15 percent. In the Turkana pastoral area of Kenya, there is similarly an increased risk of malnutrition by the increasing number of children with MUAC<135mm.

A below-normal harvest has been reported in the *belg* areas of Ethiopia as well as the bimodal districts of northern Tanzania. Seasonal assessments are currently underway in both Somalia (*gu*) and Kenya (long rains), but there are no indications of significantly good harvests in either of these areas.

The June-September (*meher*) season is the main cropping season in Ethiopia and southern Sudan. However, the rainfall performance shows that rainfall has been erratic to date and below normal in the western highlands of Ethiopia in June. Likewise in southern Sudan, rainfall performance has also been erratic and is causing a significant delay in the start of the planting season in most parts of southern Sudan.

Most-likely food security scenario

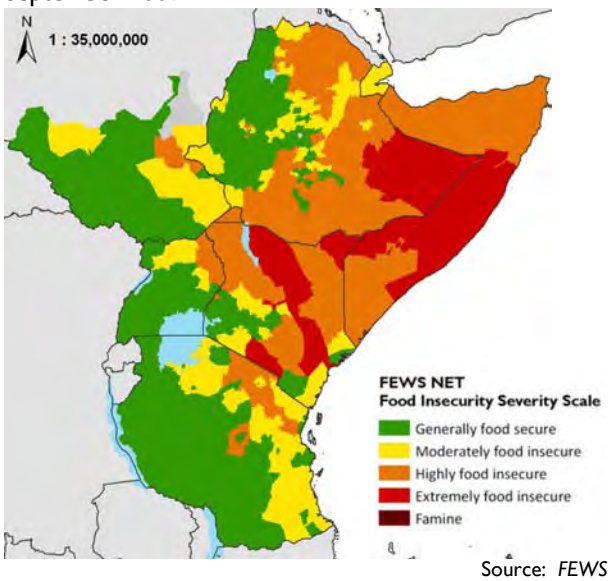
Pastoral, agro-pastoral and marginal cropping areas in the Eastern Sector

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

The analysis of the most–likely food security scenario for July to September among these groups is based on the following key assumptions:

(i) Livestock prices will decline because of poor rangeland conditions while cereal prices will remain high;
(ii) The usually dry June-September period in these areas will be drier than normal due to the preceding poor rainfall performance, and the current dry season will persist until October;
(iii) Abnormal migrations will continue increasing the potential for resource-based conflicts and contributing to localized land degradation;
(iv) Currently high levels of acute malnutrition are unlikely to decline significantly, unless significant humanitarian assistance is allocated to address this issue.

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



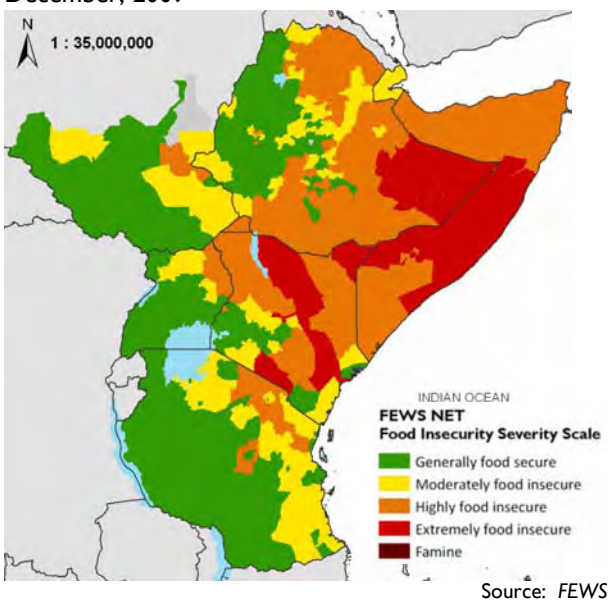
Source: *FEWS NET*

Due to the prevailing dry conditions during the outlook period, and following consecutive seasonal failures and drier-than-normal conditions in the main March to May season, food security is likely to deteriorate in these areas. Poor rangeland conditions are expected to drive down livestock prices, significantly reducing pastoral incomes and terms of trade. Similarly water resources will become more scarce (evident from the increasing return distances to water of 10-30 km), indicating that water trucking will continue. Under such conditions, it is foreseeable that livestock production and body conditions will continue to decline, and at the peak of the dry season in August, increased livestock mortality is also likely, which would

further aggravate the situation in pastoral areas. Increased malnutrition related to the reduced potable water supplies and reduced food access is likely to increase. Without wide-scale emergency intervention and livelihood protections, the number of highly and extremely food insecure livestock keepers will increase substantially during the outlook period. Some of the areas in which food security is expected to deteriorate during this time include northern Somalia and the Afar region of Ethiopia.

In the marginal agricultural areas such as southeastern Kenya and parts of northern Tanzania, poor households are facing an acute food availability decline owing to the last failed season, which followed three previous consecutive failed seasons. With depleted food stocks, low incomes, reduced availability of potable water, and high food prices, it is highly likely that malnutrition will increase in these areas, unless there is a substantial effort to mitigate the adverse conditions.

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

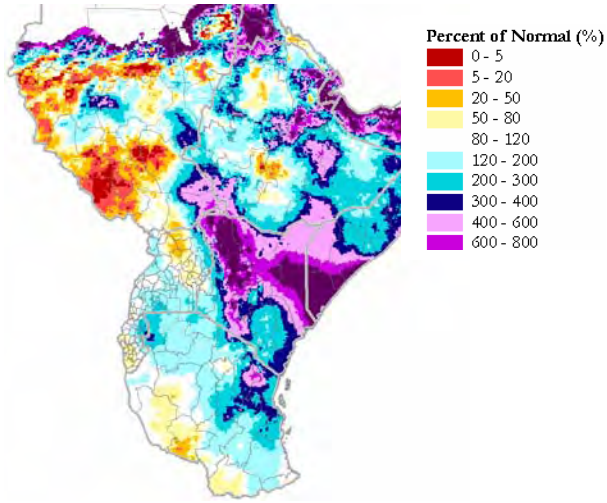


Source: *FEWS NET*

Cropping areas of Ethiopia

This outlook period considers the food security situation in all cropping areas (both *belg* and *meher* producing) in Ethiopia. These are considered a hotspot area because of the successive poor *belg* production seasons and the increased prospect of a below-normal main (*meher*) season. The preliminary *belg* assessment results show poor performance of the *belg* season and interim results show a likely increase in the food insecure population from 4.9 million (current figure) to 6.2 million people, in addition to the 7.4 million people covered under the Protective Safety Nets Program (PSNP). The *meher* (June-September) season is most important in the western highlands of Ethiopia and is also the main agricultural season for Ethiopia. The start of the *meher* season was erratic and below normal in June. This rainfall pattern is consistent with the El Niño event expected in the October-December season. El Niño is typically associated with erratic rainfall over the western highlands of Ethiopia in June-September, which is also the main season, accounting for more than 50 percent of the total national agricultural production. The El Niño formation also leads to unseasonal rains in these areas during the harvest season in October and November, resulting in high post-harvest losses. This could decrease production by 20-25 percent and increase prices by 20 to 50 percent. Therefore, there is a high likelihood of a reduced harvest of the main production season of Ethiopia, which is likely to cause a further decline in food security conditions during the outlook period. The mitigating factors are likely to be enhanced humanitarian support through emergency and PSNP resources and the higher than normal rains in October-December.

Figure 4. Rainfall conditions from October-December, 1997



Source: *FEWS NET*

Main cropping areas

These areas include central and western Kenya, south-central Uganda, most of Tanzania, and southern Sudan. During this period, the harvest is expected from the bimodal areas of Uganda and northern Tanzania, as well as the long rains harvest in Kenya, which would generally boost the food security situation in these areas. Most of these areas are expected to be food secure, but some localized areas will experience moderate food security until the next short rains due to: i) the carryover effect of below normal production in 2008 and this current year crop in Kenya's central highlands and ii) the below normal harvest from northeastern Tanzania in 2009.

In South Sudan, the food security situation is likely to decline, especially during the hunger season up to August, but improve from September onwards. To date there has been a delayed start of season, according to field reports, but it is still too early to project the likely effect this may have on the outcome of the production season.

Potential impacts of an El Niño event

The outlook of the October-December period (Figure 3) will be driven by the El Niño phenomenon expected during this season. This phenomenon is associated with wetter-than-normal conditions in the eastern sector of the Greater Horn of Africa and drier than normal conditions in the northern and southern sectors of the region. Data from three previous El Niño years are used to highlight the potential effects of an El Niño event on food security: the 1997 El Niño event, representing the most intense El Niño in recent history (Figure 4); the moderate 2006 El Niño event (Figure 5); and the mild 2002 El Niño event (Figure 6). Although it is still too early to determine the timing, intensity, and duration of the prospective El Niño, past events show that the eastern sector benefits the most, regardless of the intensity. This is in terms of increased water recharge and pasture regeneration, which is beneficial for pastoral livelihoods, and a long and wetter growing season for the cropping areas. On a macro-economic level, increased water supply for power generation, industrial and domestic use as well as for irrigated enterprises could contribute to economic growth especially if pre-emptive actions are taken to minimize the negative effects such as flooding, damage to infrastructure and an upsurge of water-borne diseases that also come with an El Niño.

Figure 5: Rainfall conditions from October – December, 2006

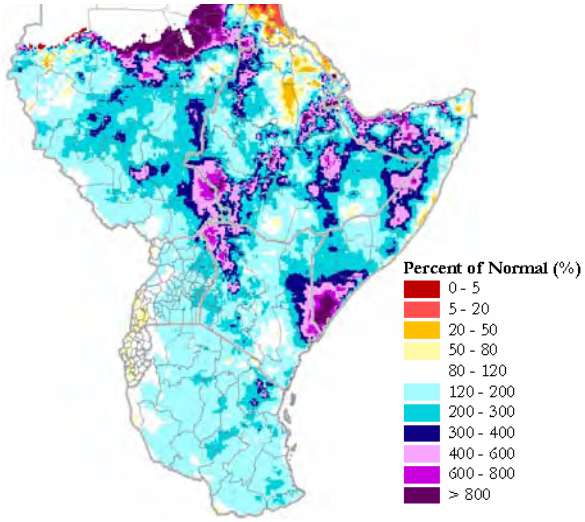
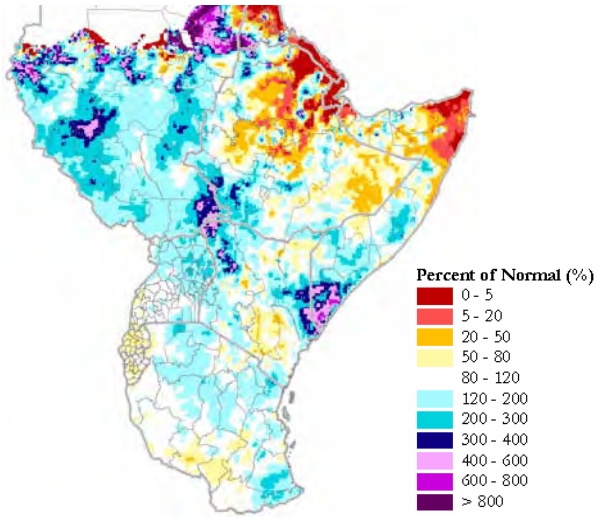


Figure 6: Rainfall conditions from October-December, 2002



Source: *USGS/FEWS NET*

Specifically in terms of livelihoods, and considering the mild form of the El Niño, it will be most beneficial in the eastern sector particularly central-southern Somalia, eastern and northwest Kenya as well as eastern parts of southern Sudan. In all cases, some drier-than-normal conditions are present in the Afar region and also notably in 1997 in the central highlands of Ethiopia.

Therefore the prospect of an El Niño at this time could enhance the October-December short rains and bring a respite to the 3-5 consecutive season failures in the pastoral areas and in the marginal agricultural areas. Increased water availability will regenerate pastures and water for livestock, although some livestock deaths could occur in the short-term during the transition from the current dry season into the wetter season, although this is dependent on the intensity of the event. In the long-term, however, some improvement in food security conditions of the pastoral areas is expected in the subsequent season in 2010.

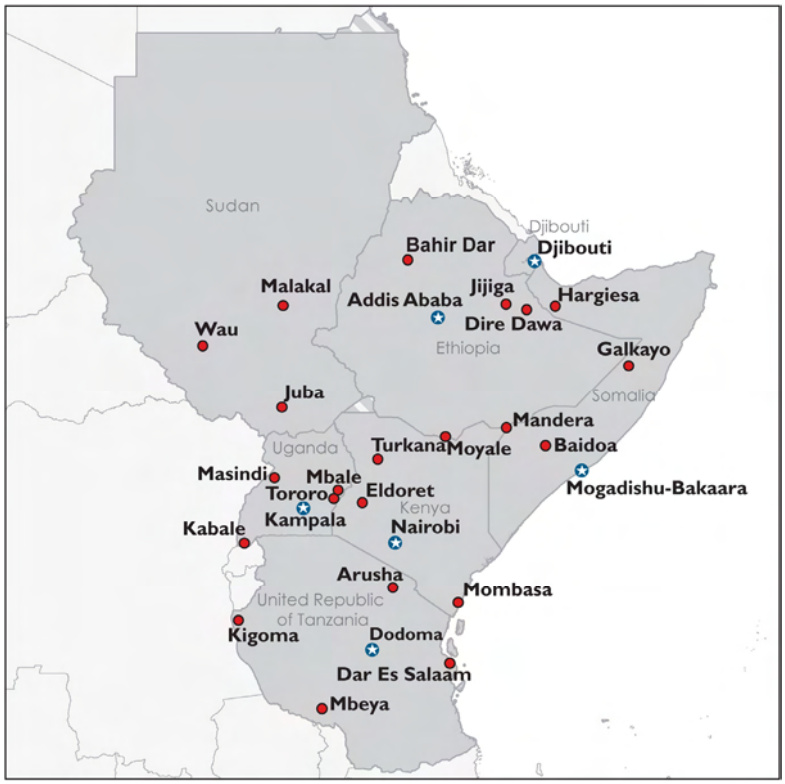
In general, above normal rainfall will occur in all the main cropping areas in the region where the October-December rains are important. These include the bimodal areas of Tanzania and Uganda and parts of Kenya. However, the unseasonal rains at this time could disrupt the harvest of the long rains harvest season in Kenya, the *meher* harvest in Ethiopia and the main season in southern Sudan, and also increase post-harvest losses through fungal spoilage. This effect is critical because both of these harvests contribute more than 50 percent of the total annual production in the three countries.

In conclusion, food security conditions related to an El Niño event will be mixed. While it is beneficial for breaking the cycle of consecutive seasonal failures in the pastoral areas and regenerating rangeland conditions, it could be associated with an upsurge of water borne diseases, such as Rift Valley fever. Therefore preparedness and surveillance should be strengthened in these areas. Widespread flooding is also another side effect of the event which can be mitigated partially through proactive preventive maintenance of flood control structures, where available. Water management is key in harnessing the full benefits of a longer and wetter cropping season. This is also the time to work on the water harvesting and storage structures to maximize the full benefits of an El Niño event for water supply and power generation.

Table 1: Events that 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*	• July-September rains are significantly better than forecast	• Improved crop and livestock production	Very unlikely	Livestock prices, migration and terms of trade
Marginal agricultural areas *(South-eastern lowlands and northeastern border area of Tanzania)*	• Price of food commodity reduce dramatically	• Improved food access through markets	Very unlikely	Staple food prices
Main Agricultural areas– *(Meher areas of Ethiopia, Western Kenya and Most of Uganda, Tanzania and southern Sudan)*	• Normal dry conditions during the harvest patterns	• No disruption of harvest and minimal post-harvest losses	Unlikely	Rainfall totals and distribution; staple crop production

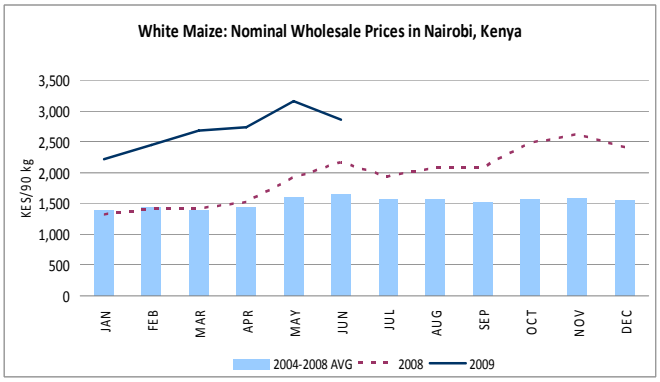
* Probability levels	Description
Likely	Likely to occur in the time period under current conditions
Unlikely	Could occur in the time period if conditions changed moderately
Very unlikely	Could occur in the time period if conditions changed significantly

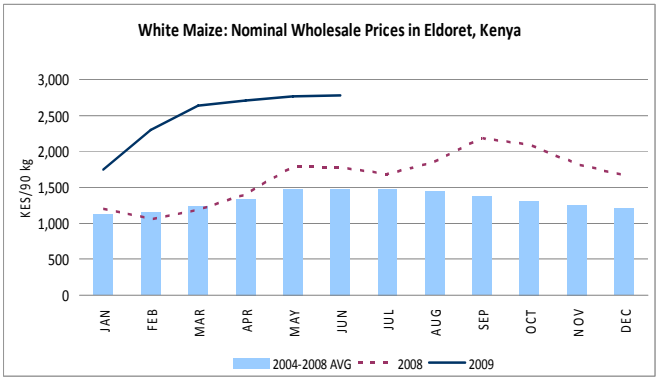


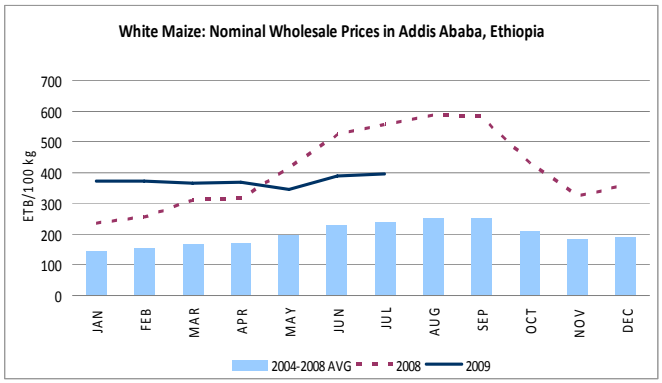
Monthly prices are supplied by FEWS NET enumerators and a range of partners: in Ethiopia, the Central Statistics Agency and FEWS NET; in Kenya, the Ministry of Agriculture (Market Research Branch); in Uganda, the Uganda Market Information System; in Tanzania, the Ministry of Trade, Industries, and Marketing;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

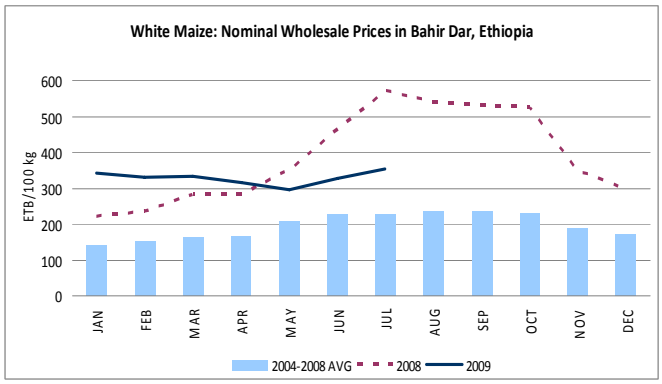
White maize is the main staple grain consumed in Tanzania, Kenya, and Ethiopia. In Uganda, white maize is grown mainly as a commercial crop for export in the region. Imported rice is a major staple for Djibouti and Somalia, which mainly consume *belem*—the imported red rice. Tanzania is also a major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






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
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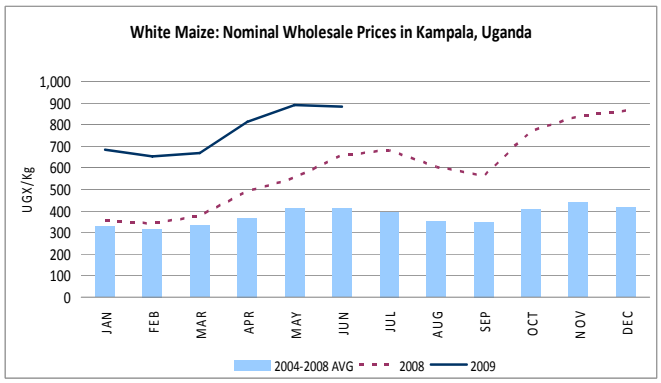
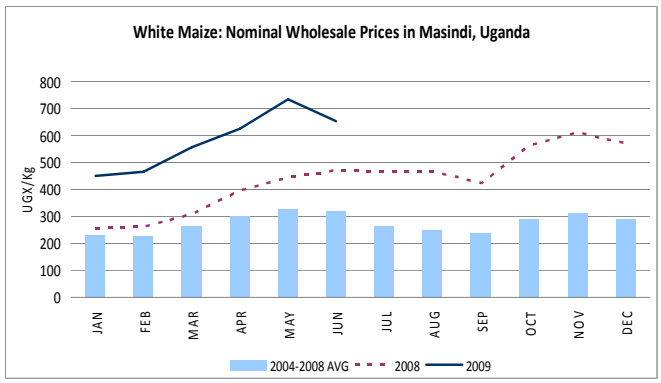
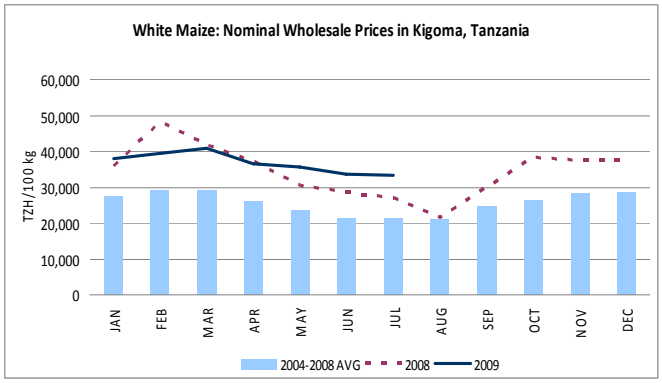
2004-2008 AVG
2008
2009


White Maize: Nominal Wholesale Prices in Kampala, Uganda
UGX/Kg
1,000
900
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 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
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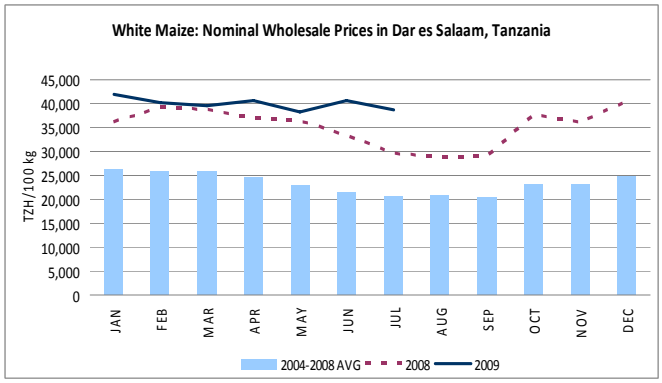
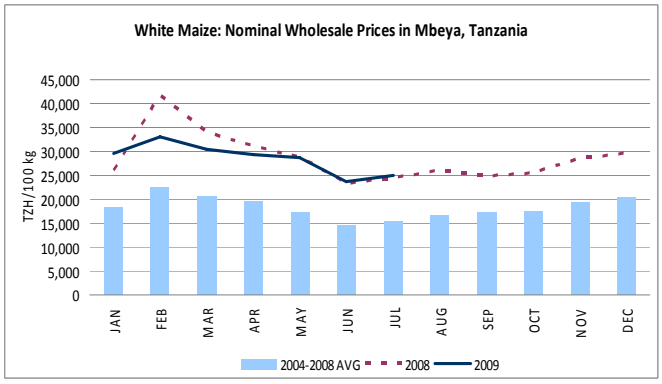
2004-2008 AVG
2008
2009


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
5,000
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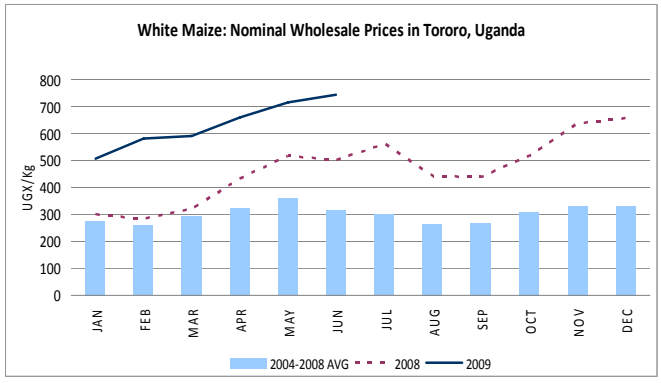
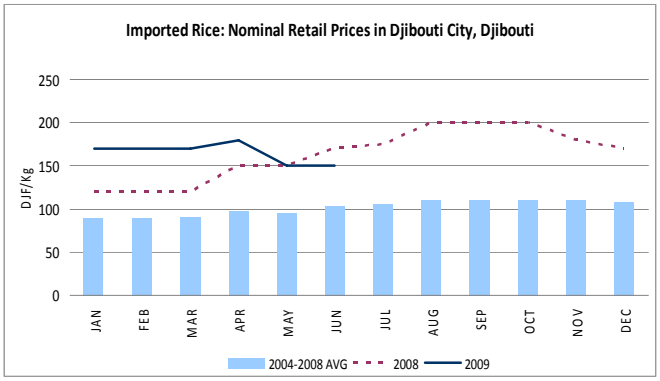
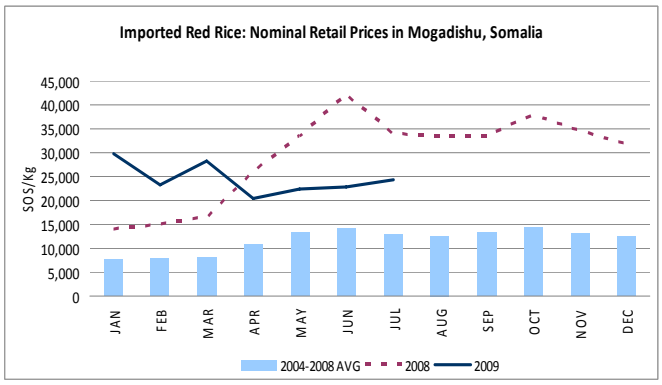
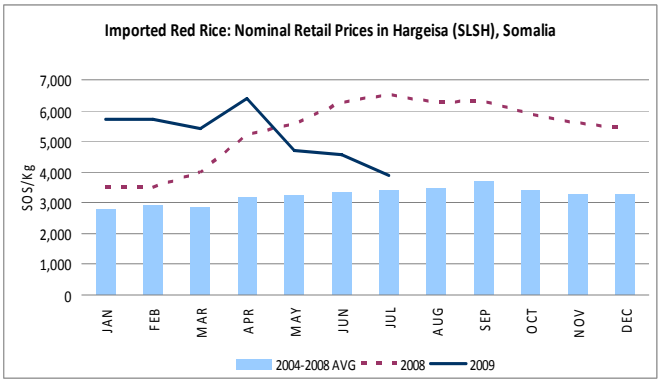
2004-2008 AVG
2008
2009

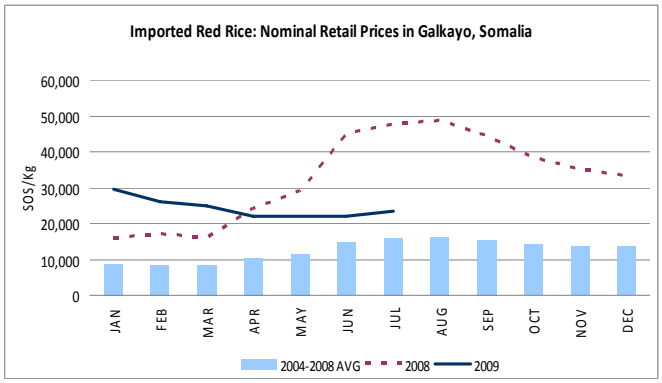

White Maize: Nominal Wholesale Prices in Tororo, Uganda
UGX/Kg
800
700
600
500
400
300
200
100
0
JAN FEB MAR APR MAY JUN JUL AUG SEP OCT NOV DEC
2004-2008 AVG
2008
2009

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

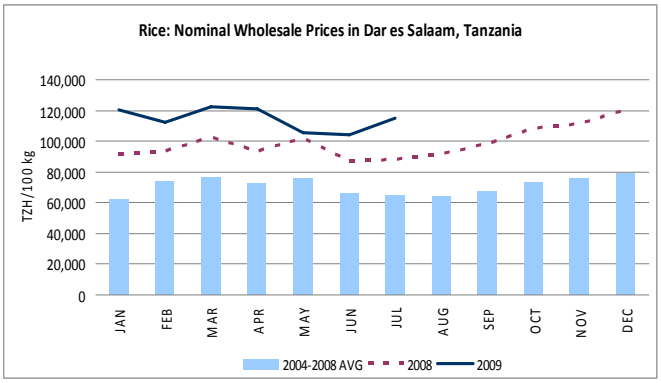


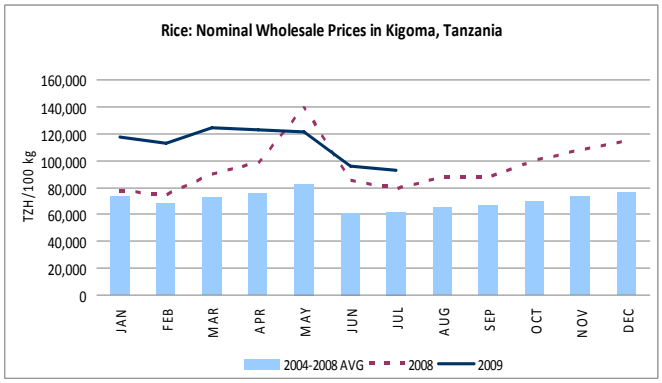




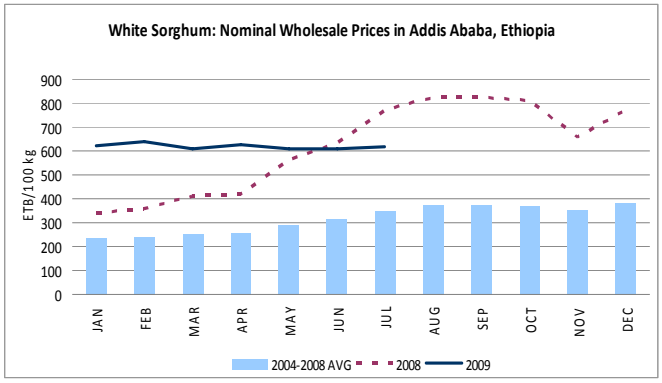


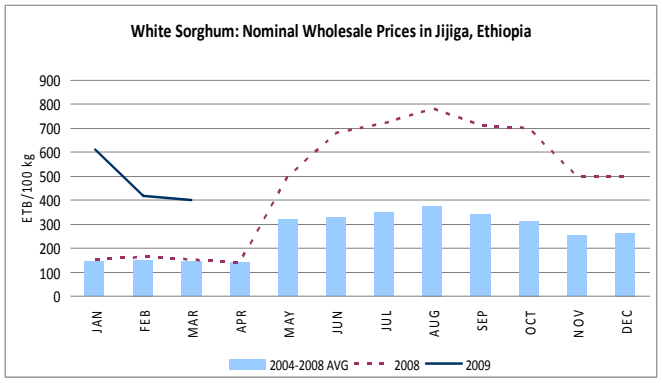
LOCAL RICE: Local rice is produced mostly in Kenya, Uganda and Tanzania. With the exception of Tanzania, most countries in the region are net importers of local rice, which has high demand in urban areas.

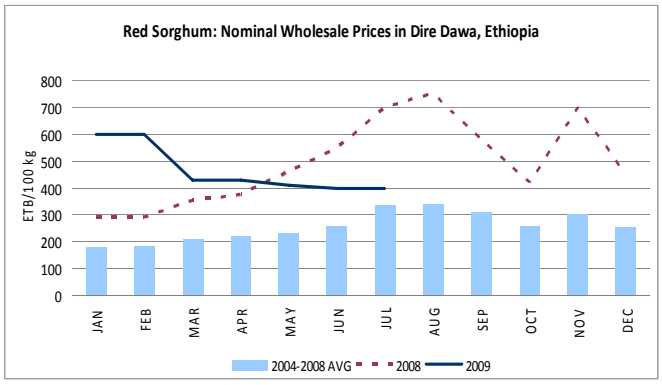


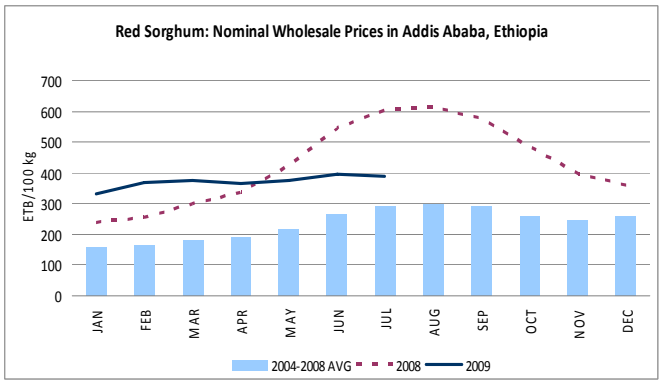


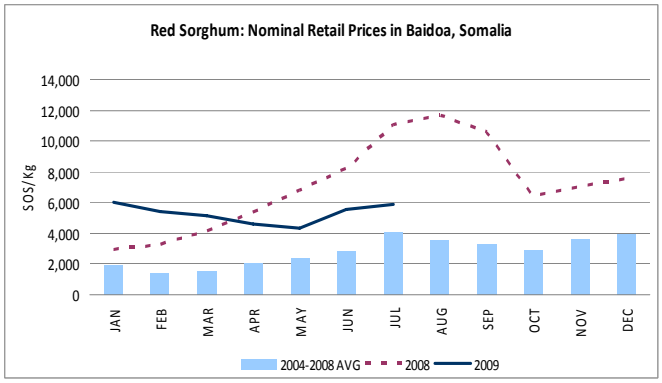
RED AND WHITE SORGHUM: Sorghum, both red and white, is an important consumption and production staple for many households in the region. These markets demonstrate the variety of places it is produced and consumed.

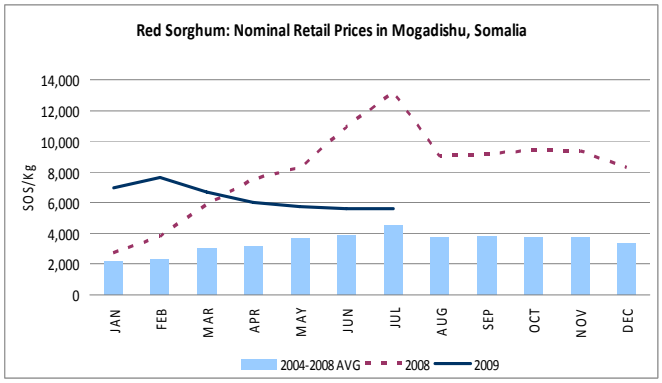


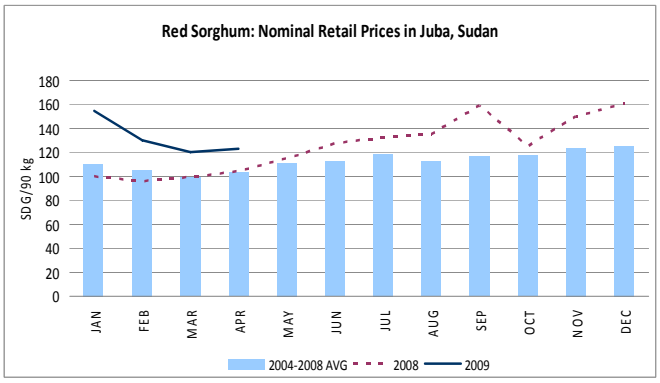


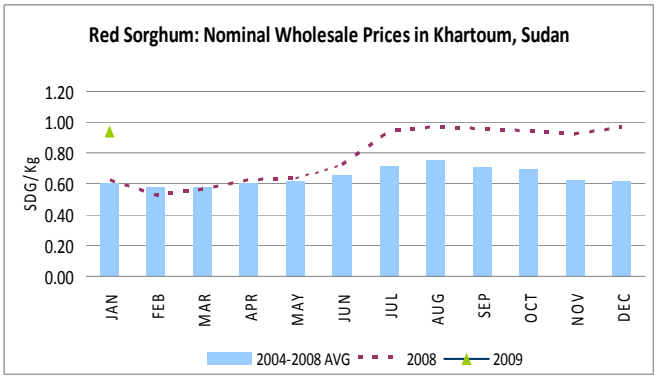


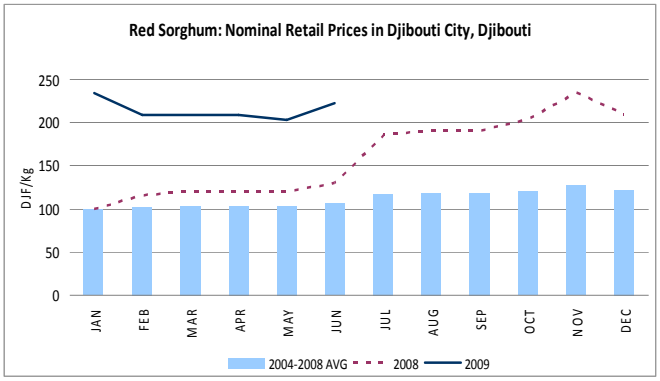


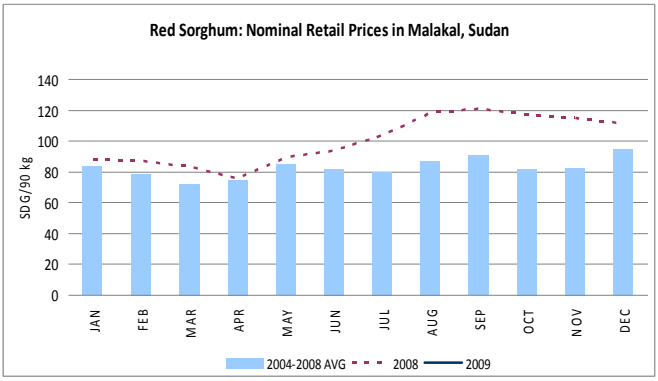




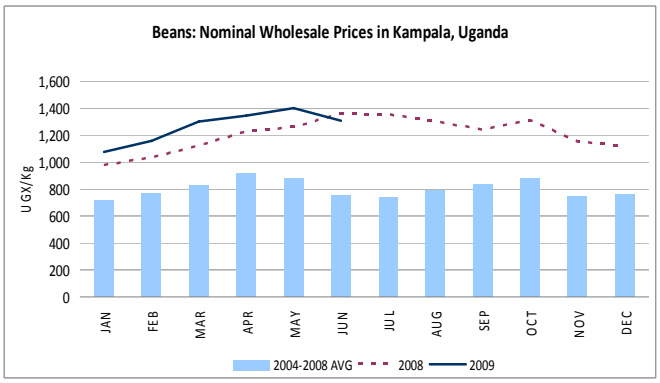


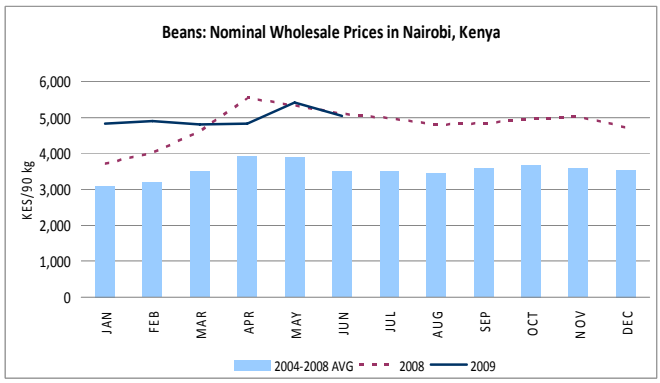


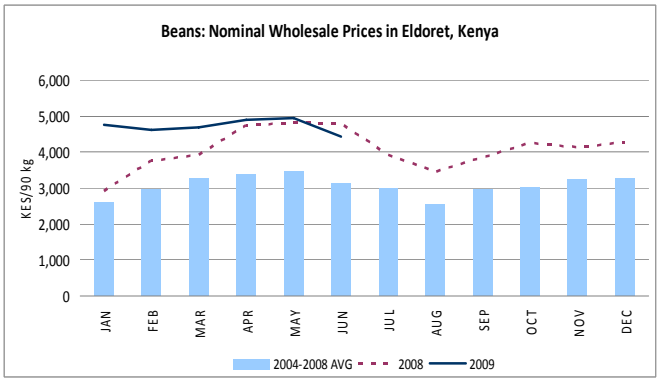


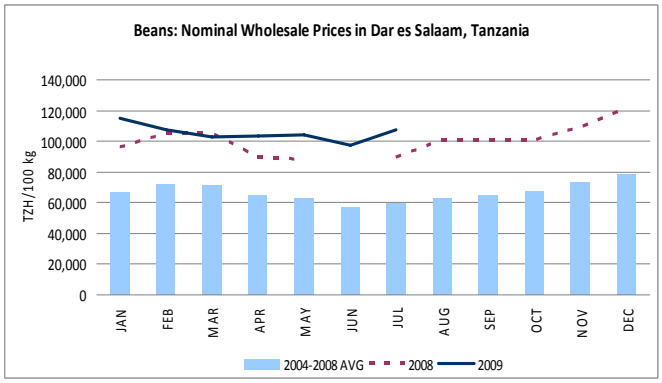


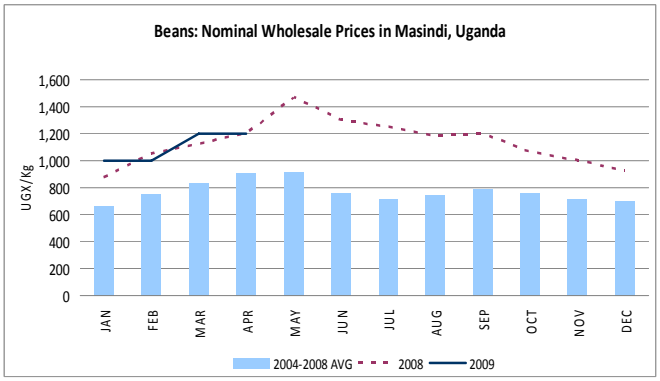
BEANS: Beans are a primary protein source throughout the region, especially in Kenya, Uganda and Tanzania. It is also a staple food in northern Sudan as well as in Rwanda and Burundi. These represent the capital city markets in Kenya, Uganda and Tanzania as well as the main production areas.

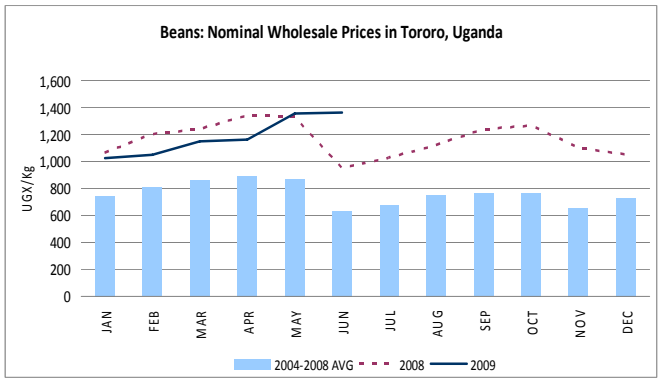


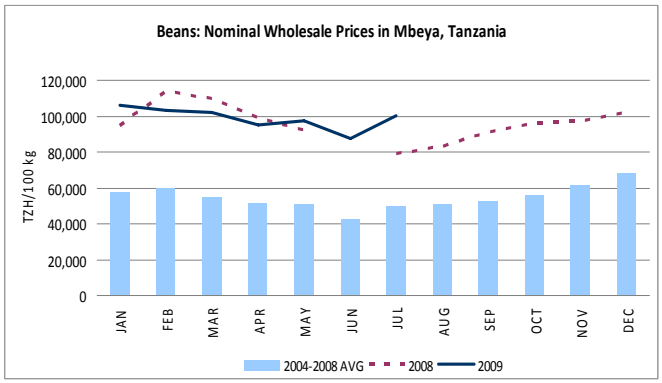


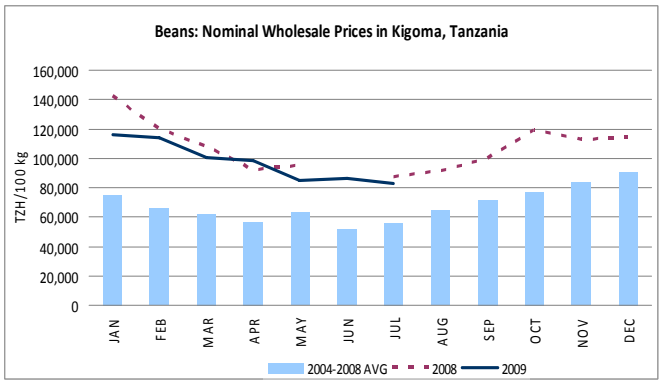
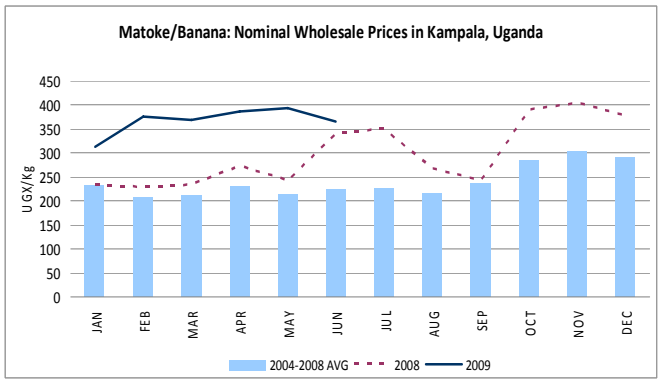
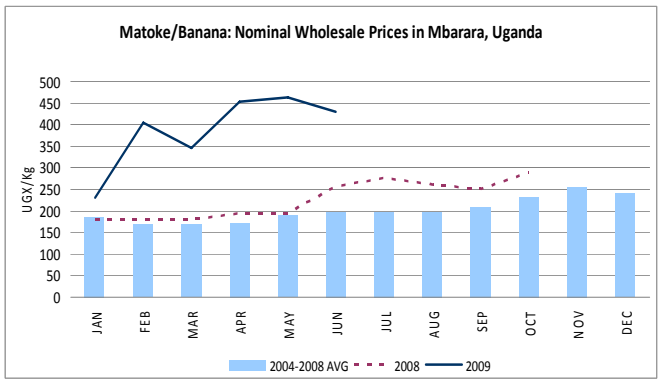
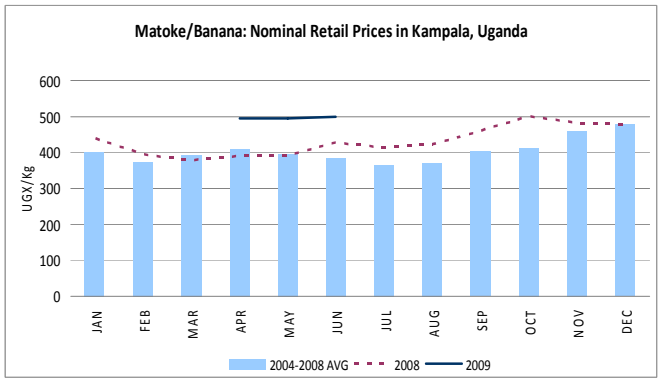












MATOKE/BANANA: These are the wholesale and retail prices for matoke, cooking banana, in the capital city market of Uganda.