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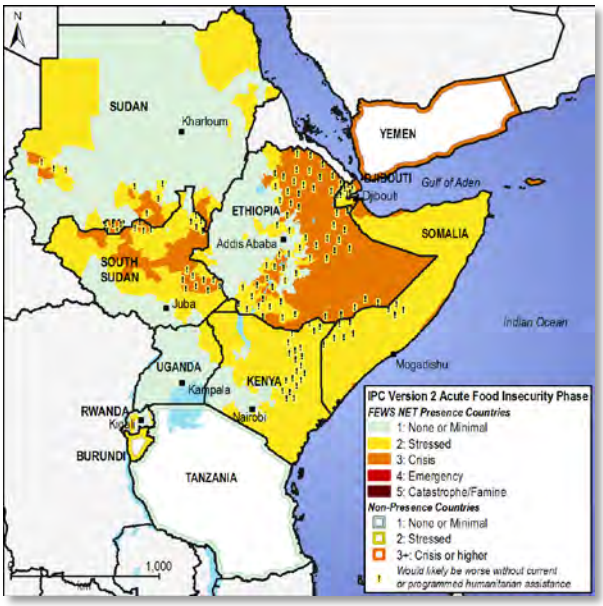
# EAST AFRICA Food Security Outlook Update — April 2013

## *Recent Implementation Matrix between Sudan and South Sudan may improve food security*

### KEY MESSAGES

- An estimated 12.9 million people in Sudan, South Sudan, Somalia, Ethiopia, Kenya, Djibouti, Uganda, Burundi, Tanzania, and Rwanda face Stressed (IPC Phase 2) to Crisis (IPC Phase 3) levels of food insecurity, a substantial reduction from the 14.9 million that needed assistance at the end of last year. This is mainly due to average to above average harvests across many countries in the region in late 2012 and early 2013 and favorable pastoral conditions (Figure 1).
- Widespread and well above-normal rains starting in mid-March, marking the onset of the March to May rainy seasons over northern and western Tanzania, Rwanda, Burundi, Uganda, the Lake Victoria basin, western, southern, and northeastern Kenya, southern and central Somalia, and eastern and southeastern Ethiopia (Figure 2).
- Following the Implementation Matrix on security, economic, and cross-border cooperation singed on March 12, tensions along the border between Sudan and South Sudan eased. Access to cross-border livestock migration routes and small-scale, informal trade have already improved food security conditions on both sides of the border.

**Figure 1.** Projected food security outcomes, April to June 2013




Source: *FEWS NET*

This map represents *acute* food insecurity outcomes relevant for emergency decision-making. Visit www.fews.net/foodinsecurityscale for more on this scale.

### CURRENT SITUATION

There have been substantial improvements in household food security in East Africa following the average-to-above-average agricultural production in late 2012 and early 2013 in **Sudan, South Sudan, Somalia, Rwanda,** and **Kenya**.

Widespread and well above-normal rains, generally starting in the middle of March marked the onset of the March to May rains over northern and western **Tanzania, Rwanda, Burundi, Uganda,** the Lake Victoria basin, western, southern, and northeastern **Kenya,** southern and central **Somalia**, and parts of eastern **Ethiopia** (Figure 2). The rains started a little later, though not significantly later than usual in the southeastern and coastal marginal mixed farming livelihood zones in Kenya and in the northern parts of Somali Region and western parts of Afar Region. *Belg* rains typically start as early as February, but did not start until later in March in the northeastern highlands and parts of East and West Hararghe Zones in Oromia Region in Ethiopia.

Planting of crops is ongoing across much of the region and favorable germination has occurred in several areas. However in the areas where the rains were late and below average, planting has not always occurred or has been delayed. Pasture and water availability has also generally improved with a major exception being in the parts of Afar bordering Amhara Region where conflict over pasture occurred at the end of the dry season. (More detailed information on climatic and seasonal progress are available in the April East Africa *Seasonal Monitor*.)

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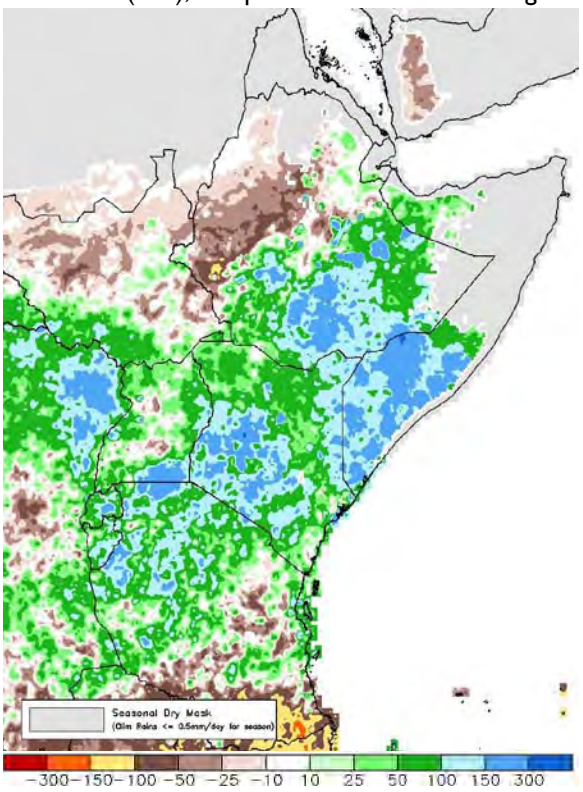
Maize prices continued to decline seasonally across most of Kenya, Uganda, Rwanda, and **Somalia** as fresh supplies from recent harvests entered markets (Figure 4). Despite good harvest at the national level, sorghum prices increased in some markets in **South Sudan** and **Sudan** due to the adverse macroeconomic situation related to lower oil revenues, trade-disruptions due to insecurity, and localized production shortfalls. Grain prices in **Ethiopia** started to increase seasonally in February with the start of the lean season in the *Belg*-producing highlands. In **Tanzania**, grain prices decreased marginally in parts of the southern highlands due to imminent start of green *Msimu* harvests in March. Livestock prices in **Somalia**, **Ethiopia's Somali Region**, and the pastoral areas of **Kenya** have started to decline, gradually, with the progression of the January-to-March dry season. (More detailed analysis of recent price trends are available in the March *Price Watch* with prices available in the *Price Watch Annex*.)

**Figure 2**. March 1- April 17, 2013 rainfall anomaly in millimeters (mm), compared to 1983-2011 average




Source: *National Oceanic and Atmospheric Administration (NOAA)/National Weather Service (NWS)/Climate Prediction Center (CPC)*

**Somalia:** Food security has improved to Stressed (IPC Phase 2) through most parts of Somalia following continued humanitarian assistance, the very good *Deyr* harvest, estimated to be the largest cereal harvest in the past ten years, higher than average livestock prices, and improved milk availability following overall good October to December *Deyr* rains. There are, however, areas that continue to face Crisis (IPC Phase 3) and Emergency (IPC Phase 4). According to the Food Security and Nutrition Analysis Unit-Somalia's (FSNAU) *Post*-Deyr *Technical Series Report* of March 2013, some pastoralists in the northwestern parts of the country continue to face Crisis (IPC Phase 3) due to repeated poor rains since 2010 though this area did receive abnormal rains and runoff in March, preventing conditions from further, immediate deterioration. Sheep pastoralists in the coastal areas of central Somalia also continue to face Crisis (IPC Phase 3) due to repeated droughts that left them with small, insufficient herds. Generally, these areas have only received light showers so far during the March to May rainy season. Agropastoral areas of Jamame District in Lower Juba Region are also classified in Crisis (IPC Phase 3) due to a poor *Deyr* 2012 harvest in January and February 2013, poor stocks from previous harvests, and low livestock holdings are primarily selling remaining livestock to be able to purchase food. In addition, destitute pastoralists throughout the country as well as internally displaced persons (IDPs) in most IDP settlements are in Emergency (IPC Phase 4). (Additional seasonal monitoring information can be found in the Somalia *Rain Watch* from April 16.)

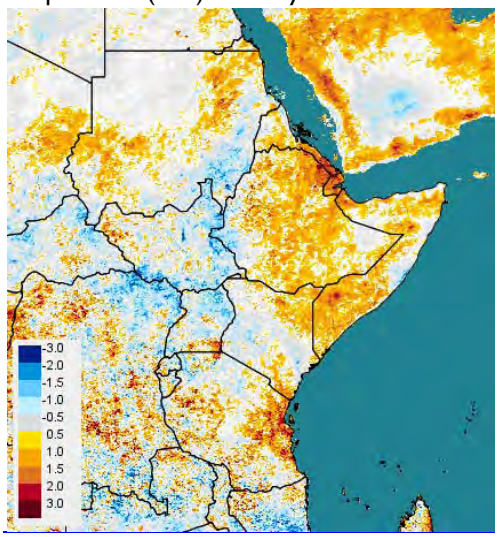
**Sudan** and **South Sudan:** The border tensions between Sudan and South Sudan eased around the third week of March following the singing of the Implementation Matrix on security, economic, and cross-border cooperation between the two countries. The advancing relationship between the two countries and the reduced security-related tension along the border enabled cattle herders in East Darfur, South Darfur, and South Kordofan in Sudan to cross the border into South Sudan for seasonal grazing. This allowed access to grazing resources for a large number of livestock that had gathered since January in areas on the Sudanese side of the border where pasture and water availability were poor. Pumping of South Sudan's oil for export via port and processing facilities in Sudan started during the first week of April. Many of the border areas in both countries continue to face Crisis (IPC Phase 3) levels of food insecurity, despite the recent improvements.

**South Sudan:** In Jonglei State in South Sudan, conflicts due to cattle raiding are continuing to prevent normal livelihood activities and have already displaced thousands from their homes. Cattle raiding also affected Lakes, Warrap, and Unity States. Cattle raiding is common during the December to April dry season as livestock aggregate around water points and in common grazing areas. These areas are currently in Crisis (IPC Phase 3).

**Ethiopia:** Food security has deteriorated in the sweet potato-producing parts of Southern Nations, Nationalities, and Peoples' Region (SNNPR) due to moisture stress during the planting window in November/December, shortages of sweet potato cuttings for planting, and the late onset of the *Belg* rains in February. Sweet potatoes are an important bridge crop during the February to May lean season that precedes the start the *Belg* harvest in June/July. In addition to the late start of

season in SNNPR, the *Belg*-producing parts of southern Tigray, eastern Oromia, and eastern Amhara Regions are currently facing Crisis (IPC Phase 3) levels of food insecurity due to the poor performance of both *Belg* and *Meher* crops in these areas in 2012. Rains have started late in these areas and generally been light so far.

**Figure 3.** February 2013 land surface temperature (LST) anomaly as a Z-score



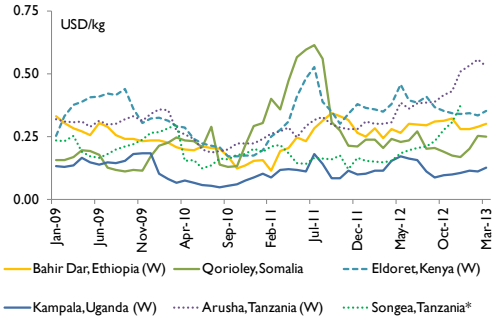

Source: *U.S. Geological Survey (USGS)/FEWS NET*

## PROJECTED OUTLOOK THROUGH JUNE 2013

- The March to May rains are expected to continue to be normal to well above normal over the western and central sectors of the region as was forecast by the IGAD Climate Predication and Application Center (ICPAC) and partners at the beginning of the season. April, is typically the peak month of this rainfall season, and the rains are expected to continue. Rains were heavier than usual and in areas earlier than usual in March in the eastern sector of the region due to cyclonic activity in the Indian Ocean to the northeast of Madagascar, which brought additional moisture into the region. The performance of the rains after April will heavily depend on cyclonic activity in the Indian Ocean, in addition to other factors, that will help drive the rainfall distribution and intensity in the eastern sector.
- Early forecasts for the June to September seasonal rains by the European Center for Medium-Range Weather Forecasts (ECMWF) and by the NOAA/CPC suggest that these rains would likely be normal with a near-normal onset. However, parts of western and northern Ethiopia, neighboring areas of eastern Sudan, the Darfur States in Sudan, South Sudan, and Uganda have a slightly increased chance for above normal rainfall.
- Vegetation conditions are expected to improve over the coming weeks due to the on-going March to May rains, especially in areas that were adversely affected by poor October to December rains and abnormally high land surface temperatures in January and February in northern **Tanzania**, southern and parts of eastern **Kenya**, southern **Somalia**, the *Belg*-cropping areas, and other areas in the eastern parts of **Ethiopia** (Figure 3).
- **Sudan** and **South Sudan:** Following the Implementation Matrix between the two countries that enabled cattle from Sudan to cross the border to South Sudan and some informal trade to flow, further improvements in food security are expected in both countries. Livestock body conditions are expected to improve with the better availability of pature and water in South Sudan. Cross-border labor migration is now more available, which will be especially important with the start of land preperation and the agricultural season in both countries in April. Food is also expected to flow from Sudan to South Sudan, especially given the stocks from the very good harvest in Sudan this past year, improving the availability of food in the northern border areas of South Sudan. Prices of staples are also expected to decline in these areas with the arrival of new supplies from Sudan. The resumption of pumping of South Sudan's oil for export via facilities in Sudan are expected to improve macroeconomic conditions in both countries as oil payments in U.S. dollars (USD) begin. The first batch of oil for export is expected late May/early June. Food security and broader macroecnomic stability is expected to improve in both countries over the coming several months.
- **South Sudan:** Cattle raiding, which typically occurs during the dry season in Jonglei, Warrap, Unity and Lakes States is expected to continue until the end of the dry season towards the end of May/beginning of June. These areas will continue to face Crisis (IPC Phase 3).
- **Ethiopia:** Sweet potato-producing parts of SNNPR in Ethiopia will continue to face Crisis (IPC Phase 3) until the *Belg* harvest begins in June. Levels of acute malnutrition typically deteriorate rapidly in this densely populated part of the country during the February to May lean season. Other *Belg*-producing parts of Ethiopia will also continue to face Crisis (IPC Phase 3). The lean season that should typically end in June with the start of the *Belg* harvest, but it will most likely be extended due to the late onset of the *Belg* rains and associated delays in planting. Eastern, marginal, *Meher*-producing parts of the country, including those in the lowlands of East and West Hararghe, had a well below average *Meher* harvest in October/November 2013. These areas will also continue to face Crisis (IPC Phase 3) through June.
- **Somalia:** The timely or slightly early onset of the April to June *Gu* rains and continued good performance since then is expected to further contribute to overall improvement of food security in Somalia. However, recovery for pastoral households with very few livestock will remain limited. Sheep pastoralists in the coastal areas of central Somalia are

expected to continue to face Crisis (IPC Phase 3). Agropastoral areas of Jamame District in the Lower Juba Region who had a poor D*eyr* 2012 harvest in January/February 2013 will also continue to face Crisis (IPC Phase 3) at least until the *Gu* harvest begins in June or later, as these areas typically receive their rains late in the *Gu* season or from coastal rains during the July to September *Hagaa* season. In addition, destitute pastoralists throughout the country as well as internally displaced people (IDPs) in most IDP settlements are expected to remain in Emergency (IPC Phase 4) due to the declining availability of food aid in the IDP settlements.

**Figure 4.** White maize prices, 2009-2013




Sources: *FSNAU/FEWS NET, Ethiopia Grain Trade Enterprise (EGTE), Ministry of Agriculture of Kenya, Tanzania Ministry of Industry, Trade, and Marketing, and Farmgain Africa*

*(W) indicates wholesal prices. Other prices are retail.*

- **Kenya:** Significant improvements in household food security have already occurred following the near average short rains crop in February/March and the improved grazing conditions that followed the onset of the March to May rains. Southeastern and coastal marginal agricultural livelihood zones as well as the pastoral areas of the country will continue to be Stressed (IPC Phase 2) as they continue their recovery from previous poor seasons.

- **Rwanda:** Households in the Eastern Semi-Arid Agropastoral livelihood zone and the Eastern and Western Congo-Nile Highland Subsistence Farming livelihood zones in Rwanda that suffered significant crop losses during the Season A harvest from December to February will continue to be Stressed (IPC Phase 2) while the rest of the country will face Minimal (IPC Phase 1) through June. Some improvements are expected beginning in June when the Season B harvest begins.

- **Uganda:** Similarly, the agropastoralists in Karamoja are expected to continue to face Stressed (IPC Phase 2) levels of food insecurity due to the effects of last season's below-average harvests in August/September. However, the start of the rainy season in early April will create agricultural labor opportunities, increase milk production, and improve wild food availability.

- **Tanzania:** Food security is expected to improve to Minimal (IPC Phase 1) in the central marginal areas, bimodal, and unimodal areas of Tanzania that were Stressed (IPC Phase 2) as the green harvest begins in April. These areas had a below average December/January *Vuli* harvest following below normal September to December *Vuli* rains and outbreaks of crop diseases.

- **Burundi:** Several groups within Burundi, including returnees, IDPs, and poor households living in the Dépressions de l'Est and the Hauts Plateaux Humides livelihood zones will face Crisis (IPC Phase 3) between now and the next harvest in late June due to poor December to February Season A harvests in localized areas, crop diseases, and elevated food prices.

- Staple prices are expected to decline in in **South Sudan** due to the resumption of some cross-border trade with **Sudan**. If the cross border trade improves between the two countries, it will impact staple food prices in other countries. As Uganda is now the primary source of imported staples to South Sudan, the increased supply to South Sudan of sorghum from Sudan will likely reduce demand for maize from Uganda. Burundi, which used to import a large volume of staple foods from Uganda had shifted to other, more expensive regional sources, so prices in Burundi may also eventually fall as supplies from Uganda come in again. In **Sudan, Ethiopia, Somalia, Kenya,** and **Uganda,** prices are expected to increase beginning in April/May as stocks from previous harvests start to decline. In **Rwanda** and **Tanzania**, maize prices will likely continue to decrease with increased market supplies from recent or ongoing harvests. In Djibouti, staple food prices will remain stable in the coming months as the result of government policies.