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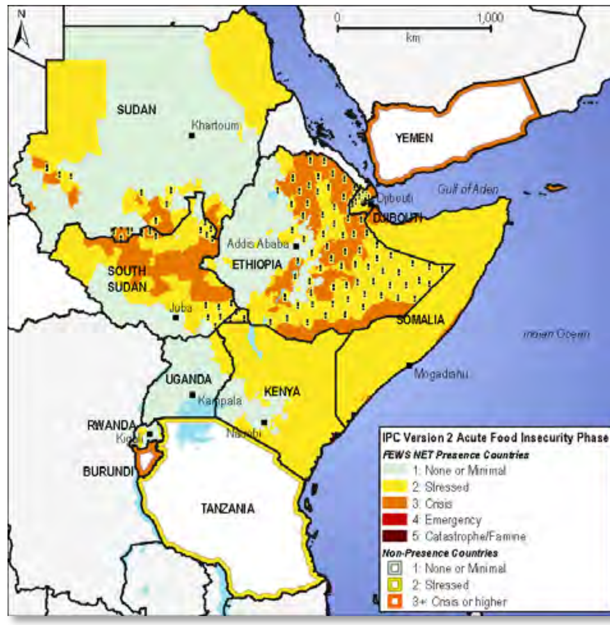
EAST AFRICA Food Security Outlook Update — June 2013

Suspending the Implementation Matrix could reduce food security in Sudan and South Sudan

KEY MESSAGES

- Food security outcomes have improved in many countries in East Africa although 12.9 million people remain in Stressed (IPC Phase 2), Crisis (IPC Phase 3), and Emergency (IPC Phase 4) in Sudan, South Sudan, Somalia, Ethiopia, Kenya, Djibouti, Uganda, Burundi, Tanzania, and Rwanda (Figure 1). The main reason for the improved food security outcomes is average to above average agricultural and livestock production in many parts of the region. Further improvements in food security are anticipated with upcoming harvests in June/July.
- Food security is expected to deteriorate through September in the conflict-affected parts of Sudan, the border areas of Sudan and South Sudan, and areas affected by conflict within South Sudan. Food security is also expected to deteriorate in the *Belg* producing areas of the northeastern highlands of Ethiopia. In the areas relying on the June to September rains and harvest between October and January in Ethiopia, Sudan, and South Sudan, food security is expected to seasonally deteriorate with the start of the May/June to September lean seasons.
- The IGAD Climate Prediction and Applications Centre (ICPAC) consensus climate outlook for the Greater Horn of Africa (GHA) region for June to September indicates increased likelihood of average to below average total rainfall over much of the region. Increased likelihood of near average to above average rainfall is indicated over central parts of the northern sector as well as the coastal and extreme western parts of the equatorial sector.

Figure 1. Projected food security outcomes, June 2013



Source: *FEWS NET*

This map represents *acute* food insecurity outcomes relevant for emergency decision-making, and does not necessarily reflect *chronic* food insecurity. For more information on this scale, please visit www.fews.net/foodinsecurityscale.

CURRENT SITUATION

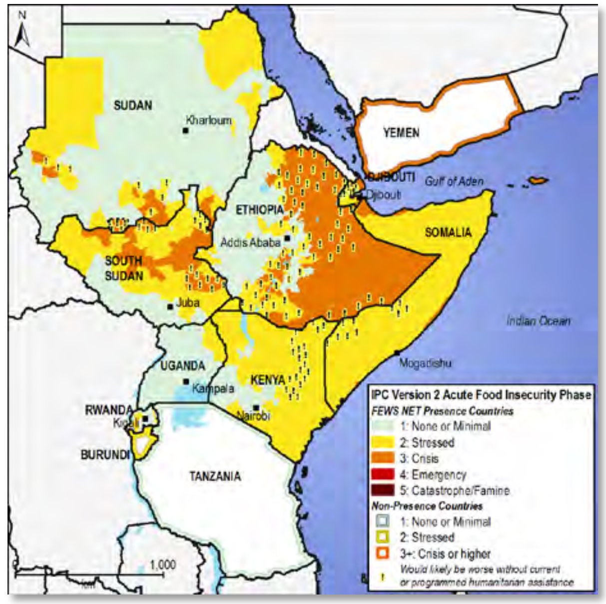
12.9 million people remain in Stressed (IPC Phase 2), Crisis (IPC Phase 3), and Emergency (IPC Phase 4) in Sudan, South Sudan, Somalia, Ethiopia, Kenya, Djibouti, Uganda, Burundi, Tanzania, and Rwanda (Figure 1). However, in many countries in East Africa, food security outcomes have recently improved. The reduction from 14.9 million food insecure people in December 2012 to 12.9 million people at the present time is primarily attributed to average to above average agricultural production since December and favorable pastoral conditions following the March to May rainy seasons in much of the region.

Cumulative March to May rainfall amounts were normal to above normal in most of East Africa (Figure 3). In particular, the rains were 200 to 400 percent above average in parts of southern and central Somalia, southeastern Ethiopia, localized areas of central Kenya, and northeastern Tanzania. However, the rains tapered off in mid-May in many parts of the eastern Horn. The early cessation is likely to reduce crop output, especially in the areas where crops were at critical tasselling, silking, or grain formation stages, including in southeastern and coastal areas of Kenya, parts of Hiran Region in Somalia, eastern Amhara, southern Tigray, and the bimodal cropping areas in the greater Equatoria states in South Sudan. Crop production prospects are good in other parts of the region. Pasture, water, and browse regenerated in many areas of the eastern Horn following the March to May rains. More information on rainfall and seasonal progress can be found in the East Africa Seasonal Monitor from June 13, 2013.

Staple prices have started to decline in Tanzania, Burundi, Rwanda, and Uganda with the start of the main season harvests. Additional information is available in the East Africa section of the Price Watch from May 31, 2013.

In addition to the high staple prices in Sudan and South Sudan, ongoing conflict between these two countries and internal conflicts within these countries are contributing to high levels of food insecurity, especially in Blue Nile, South Kordofan, the Darfur states in Sudan, and Pibor County in Jonglei State in South Sudan. According to Medecins Sans Frontieres (MSF), an estimated 120,000 people have fled conflict in and around the main towns in Pibor County. They are in the bush without access to humanitarian assistance or markets. OCHA's Humanitarian Bulletin for South Sudan for June 3-9, 2013 also reported that civilians from Jonglei State are becoming refugees in Ethiopia, Kenya, and Uganda.

Figure 2. Projected food security outcomes, July to September 2013



Source: *FEWS NET*

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UPDATED ASSUMPTIONS

Most of the assumptions made in the East Africa Food Security Outlook for April to September 2013 remain unchanged. However, the following assumptions have been updated:

- In May, the assumption was there would be an increase in oil production and revenues in Sudan and South Sudan, decreasing inflation and depreciation of the domestic currencies. Although the Implementation Matrix was signed by Sudan and South Sudan on March 12, several recent incidents suggest that actual implementation may not take place. Sudan formally declared suspension of the Implementation Matrix on June 8, stating that South Sudan continued to support rebel groups fighting in South Kordofan, Blue Nile, and the Darfur states. Sudan demanded that South Sudan take practical measures to cut off support for these rebel groups in 60 days time from June 8 or Sudan will halt oil exports from South Sudan. All oil exports must transit facilities in Sudan. The new assumption is that the Implementation Matrix will not be implemented, leading to continued high inflation and further depreciation of the South Sudanese pound (SSP) and Sudanese pound (SDG) against the U.S. dollar (USD).
- In May, the assumption was that the June to September rains would be mostly normal though somewhat below normal in parts of northern Ethiopia. In June, this assumption has been updated to be that the June to September rains will have a near normal total volume in the northern sector, including western and central Ethiopia, Sudan, South Sudan, northern Somalia, and Djibouti. However, the rains are more likely to have average to below average volume over northeastern Amhara, South Tigray, northern Afar, and northern Somali Region in Ethiopia.

PROJECTED OUTLOOK THROUGH SEPTEMBER 2013

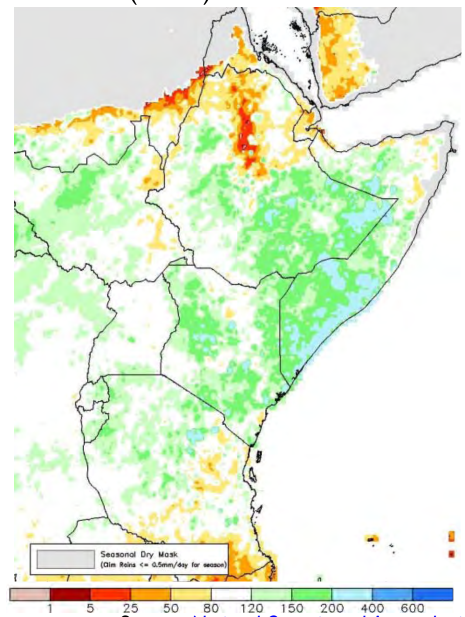
- Further overall improvement in food security is anticipated with the upcoming June/July harvest in Somalia, Kenya, Uganda, Rwanda, Burundi, and Tanzania. On the other hand, food security is expected to deteriorate further beginning in June with the progression of the lean season through most of Ethiopia, Sudan, and South Sudan as stocks from the previous harvests decline. Rapid deterioration of food security is expected in areas affected by conflict in Sudan, in the border areas in both Sudan and South Sudan, and in the areas affected by conflict within South Sudan. Food security is also expected to deteriorate in the *Belg*-producing areas of Ethiopia's northeastern highlands where February to May

Belg rains have been below average, and the June/July harvest is expected to be poor. Continued poor food security outcomes are expected in the eastern, marginal, *Meher*-producing areas where the October 2012 to January 2013 *Meher* production was much below average. In Afar and the northern zones of Somali Region of Ethiopia, the March to May 2013 rains have been below average, and rangeland conditions and water availability remain poor following this and other recent below average rainy seasons.

- **Staple food prices** are likely to continue to increase through June in Kenya and Somalia until the *Gu*/long rains harvest outside of the grain belt begins in July. In most markets of Sudan, South Sudan, and Ethiopia, staple prices are expected to continue to rise seasonably through September as stocks from the previous harvest deplete before the harvests begin in October. Additional information is available in the East Africa section of the Price Watch from May 31, 2013.

- In the conflict affected areas of Blue Nile and South Kordofan States in **Sudan**, staple food prices are very high. Access to labor opportunities, trade, and humanitarian assistance are being limited by movement restrictions and insecurity. With the May to August lean season underway, access to food is not expected to increase until September as milk production improves, more wild foods become available, and the early vegetable harvest start. The displaced will face the most difficulty accessing food. Poor households in Sudan People's Liberation Movement-North (SPLM-N)—controlled areas are expected to face Emergency (IPC Phase 4) from June to September, if no food assistance is provided.

Figure 3. March 1- May 31, 2013 rainfall total (RFE2 estimates) as percent of 1983-2012 mean (ARC2)



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

- Sporadic conflict between the Sudanese Armed Forces (SAF) and Darfur rebel groups and the growing tribal conflict in South and Central Darfur States in **Sudan** have increased since the beginning of the year. It is estimated that about 300,000 people were displaced over the first half of 2013. The escalation of conflict has disturbed trade flows within Darfur and limited access to humanitarian assistance. Household assets have been destroyed and looted. In the conflict-affected areas, food security is expected to remain at Crisis (IPC Phase 3).

- Following the likely suspension of the Implementation Matrix between Sudan and South Sudan, inflation and foreign currency problems will keep staple food prices high. South Sudan's labor migrants will face poor access to wage labor opportunities in Sudan. Livestock migration from South Sudan to Sudan from January to June 2014 will likely not occur. Areas along the borders of both countries will be the most affected, and some border areas in South Sudan could deteriorate to Crisis (IPC Phase 3) due to their high dependency on cross-border trade as a source of food and labor migration as a source of income.

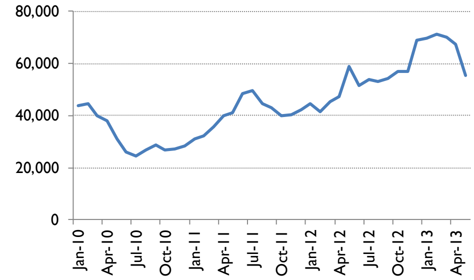
- A recent outbreak of conflict in Pibor County in Jonglei State in **South Sudan** has limited the ability of traders to reach markets in the county, leading, along with the looting and burning of food stored in urban markets, to high and rising sorghum prices. In addition to limiting trade, the closure of roads has limited humanitarian access. Food consumption is likely to decline further due to the limited access to markets or to assistance. A joint assessment report on June 6 by MSF, Merlin, and Medair on Itti, otherwise known as Boma Town, in Pibor County, Jonglei State indicated that households were mixing cattle blood with milk for consumption, which is considered a coping mechanism when consumed during the rainy season in the Pastoral livelihood zone.

- Food security improved substantially in **Somalia** as well above March and April *Gu* rains increased the availability of pasture, browse, and water for livestock. *Diraac/Sugum* rains similiarly improved pastoral conditions and food security in parts of **Djibouti**. In **Somalia**, access to milk and meat improved. Livestock body conditions improved, contributing, along with seasonally increasing export demand as livestock traders stock for Ramadan and Hajj sales to an increase in livestock prices. Overall crop production prospects are for a below average volume of the *Gu* harvest due to early cessation of rains in May, flooding in some areas, and crop damage by pests in others.

  Unlike most areas of **Somalia**, all livelihood zones in Bari region, the Coastal *Deeh* Pastoral livelihood zone in central Somalia, parts of the Shebelle Regions, and parts of Sanag received below average March to May rains. Water replenishment and pasture availability are therefore below usual in these areas. Poor households, especially the pastoral destitute, in Coastal Deeh Pastoral livelihood zone will continue to face Crisis (IPC Phase 3) through at least September.

- Performance of the February/March to May/June B*elg/Gu/Sugum/ Genna* rains has been close to average in terms of total rainfall in most receiving areas in **Ethiopia**. The rains, however, were below average and erratically distributed the northeastern highlands, northern Afar Region, and northern Somali Region. Following the poor performance of the rains that led to significant reduction in area planted and poor development of planted *Belg* crops. The prospects for the *Belg* harvest are very poor in the northeastern areas due to low area planted and subsequent moisture stress. These areas will be in Crisis (IPC Phase 3) through at least September.

Figure 4. Wholesale white maize prices in Tanzanian shilling (TZS) per 100 kilogram (kg) bag in Arusha, Tanzania, January 2010 to May 2013



Source: *Ministry of Industry and Trade (MIT) of Tanzania*

- With below average rains, pasture and water availability is poor in the pastoral areas of northern Afar and northern Somali Region in **Ethiopia**. This has led to reduced milk production and low prices for livestock. Although these areas also receive the July to September *Karma/Karan* rains, livestock holdings, especially by the poor, are already very low, following below average rainfall during the past three to four seasons, leading to low livestock birth rates. Pasture and water availability is expected to improve beginning in July with the peak of the *Karma/Karan* rains. Substantial improvements, however, are not expected in food security. The pastoral population in these areas is expected to continue in Crisis (IPC Phase 3) through September.

- In the southeastern and coastal marginal mixed farming livelihood zones in **Kenya**, the average to above average rainfall in March and April gave way to a dry spell in May. Despite the rains ceasing during a critical stage of maize development, the dry harvest of maize will likely begin in July, and some dry maize along with the more drought-resistant pulses are expected to sustain minimally adequate consumption. Poor households are likely to be able to meet minimum food requirements and remain at Stressed (IPC Phase 2) through September.

- The March to May long rains have also been beneficial in the pastoral areas of **Kenya**. Livestock body conditions and milk production have improved, and the prices of livestock have increased compared to the dry season except in localized areas of Isiolo, Marsabit, and Turkana Counties, where the long rains have been below average and grazing conditions have not adequately regenerated. Despite the drier conditions in these areas, poor households in these pastoral areas are also expected to be able to meet their minimum food requirements through September.

- Stable food security outcomes of Minimal (IPC Phase 1) will continue in most parts of **Rwanda** and **Uganda** with the start of the new harvests in June. Most households in **Uganda** and **Rwanda** are expected to experience None (IPC Phase 1) through September. The pastoral and agropastoral region of **Karamoja** in **Uganda**, however, will remain at Stressed (IPC Phase 2) due to the below average sorghum harvest of 2012 that has resulted in the early depletion of household stocks. Agropastoral livelihood zones in Karamoja are currently in the middle of their lean season which does not end until the harvest begins in October. Reduced livestock holdings are limiting households' ability to sell livestock in order to buy food. Food security is expected improve to Minimal (IPC Phase 1) in October when the harvest begins. Household food stocks in the Western and Eastern Congo-Nile Crest livelihood zones and the Eastern Semi-Arid Agropastoral livelihood zone of **Rwanda** depleted early this year following below average season A production in January/February. Poor households are expected to remain Stressed (IPC Phase 2) until the harvest for season B begins in June/July and replenishes food stocks. In **Burundi**, season B crops are nearing their maturity phase, and a normal harvest is anticipated to start in June. This will replenish household food stocks to normal levels and decrease prices by increasing supply. As a result, Minimal (IPC Phase 1) is expected between July and September including in the *Dépressions de l'Est* and *Plateaux Humides* livelihood zones that faced Crisis (IPC Phase 3) during the extended lean season between February and May. In **Tanzania**, high food prices across the country since July 2012 limited food access for poor households. Since March, prices have started to decline with the start of the harvest in the northern, bimodal areas (Figure 4), as well as in the central, marginal, bimodal-to-unimodal transition areas. Further reductions in staple food prices are expected when the *Msimu* harvests begins to reach markets in June. Food security is expected to improve to Minimal (IPC Phase 1) between July and September throughout the country.