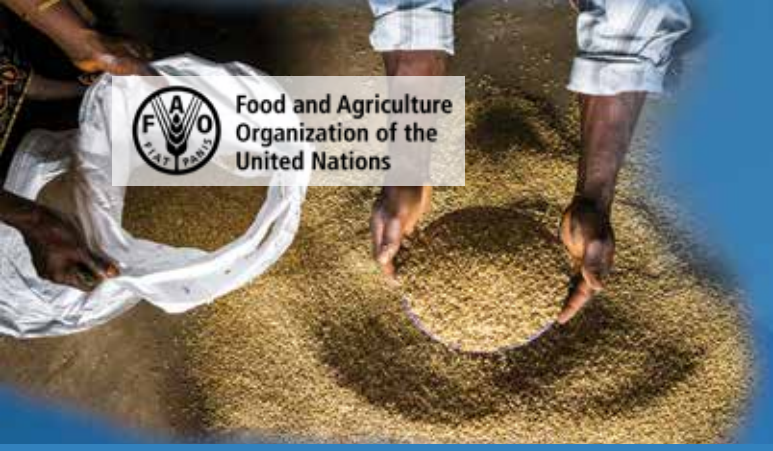

Food and Agriculture Organization of the United Nations

FOOD SECURITY UPDATE

A quarterly bulletin of FAO Subregional Office for Eastern Africa

Update on the state of food security in the Eastern Africa Region

Issue No. 2 October 2017

KEY MESSAGES:

- Approximately 24.3 million people are currently food insecure and facing a crisis situation of IPC 3 and above in Eastern Africa sub-region particularly in parts of Kenya, Uganda, Somalia, Djibouti, Ethiopia, South Sudan, and Burundi (FSNWG Sept 2017);
- While the recently harvested crops have somewhat improved food security in some areas of Somalia, southern Kenya, Uganda, Rwanda, and Burundi; a dire food insecurity situation still persists in southeastern Ethiopia, Somalia and South Sudan due to dry weather conditions and conflict;
- Crop production throughout 2017 has been affected by erratic rainfall and pest infestations and crop outputs are expected to be below-average in several countries in the eastern Africa sub-region;
- Fall Army Worm (FAW) infestation has continued to affect crops in the sub-region with reported significant crop damage in South Sudan where its presence confirmed since July 2017 in several areas in six states;
- Most severe forage and water deficits have been recorded in south-eastern Ethiopia, central and southern Somalia and northern and eastern Kenya;
- While livestock to cereals Terms of Trade (ToT) across the sub-region varied, it has been deteriorated unfavourably to pastoralists in pastoral areas of Kenya and improved favourably to pastoralists in Karamoja area of Uganda;
- In Somalia and South Sudan acute malnutrition has reached critical levels in many areas.

INSIDE THE BULLETIN:


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RAINFALL UPDATE

Cumulative seasonal rainfall between June and Sep 2017 has been well above average in many of part of Eastern Africa (Figure 1). Mmoderate to extreme wet rainfall conditions were observed in in many parts of the sub-region that include western and central highlands of Ethiopia, large parts of South Sudan and Djibouti, some parts of northern Somalia, large parts of Uganda, and western Kenya. The average to above average rainfall conditions across these areas have assisted crop and pasture growth for farmers and pastoralists.

Cropping conditions have been mostly favorable in Ethiopia's Kremti season dependent areas and in South Sudan, although Fall Army Warm (FAW) is a concern in both and conflict in South Sudan is likely to disrupt farming activities. In Kenya, the extension of seasonal rains has contributed to improvements in cropping prospects, but are also constraining some harvest and drying activities for maize. Eastern Ethiopia, large parts of Somalia, some parts of southwestern Uganda, much of Burundi, and northern Rwanda showed moderately dry to severely dry rainfall conditions.

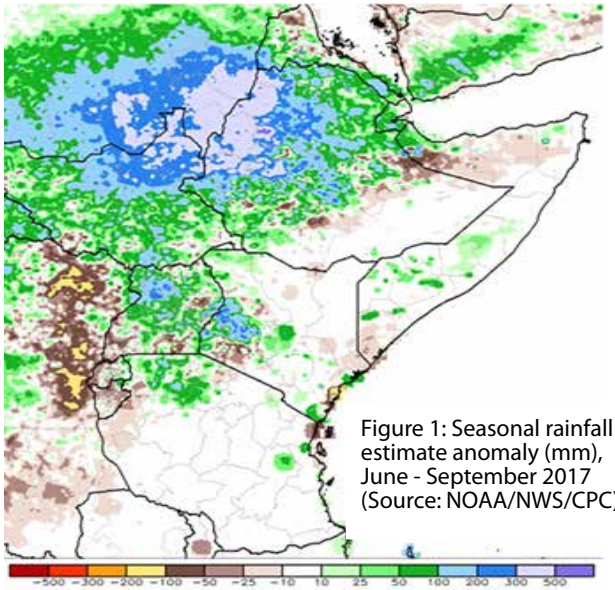

Figure 1: Seasonal rainfall estimate anomaly (mm), June - September 2017 (Source: NOAA/NWS/CPC)

CLIMATE OUTLOOK

TThe Greater Horn of Africa Climate Outlook Forum (GHACOF) regional outlook for the next three months (Oct-Dec) indicates an increased chance for above normal rainfall over much of the southern and equatorial sectors (see Figure 2).

Increased likelihood of near normal to below normal rainfall is indicated over eastern and north-eastern parts of the equatorial and southern parts of the northern sector. According to the analysis by Food Security Working Group (FSNWG), extended dry periods are expected during November, but October is expected to have shorter dry spells compared to average. Warmer temperatures are predicted over most parts of the GHA for October-December.

The El Niño–Southern Oscillation (ENSO) and Indian Ocean Dipole (IOD) remain neutral. The sea surface temperature (SST) forecast of some models predict weak La Nina conditions may form by December through to January-March, and then weakening slightly.

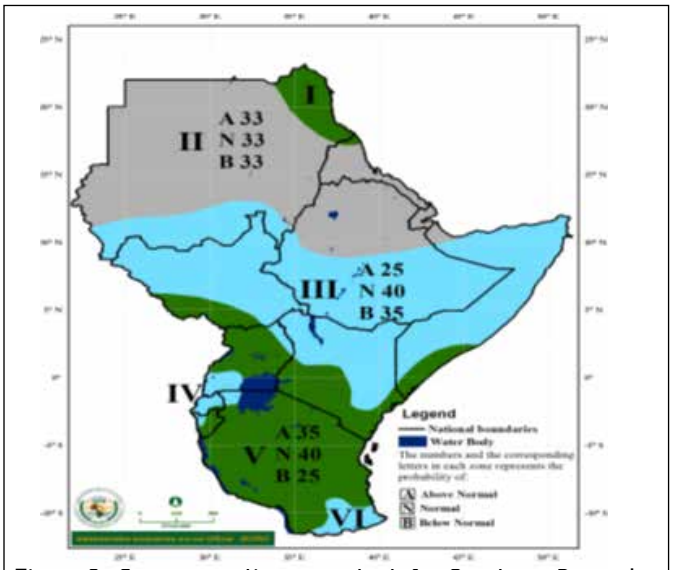

Figure 2: Consensus climate outlook for October - December 2017 (GHACOF 47 2017).

CROP PRODUCTION

The FAO Crop Prospects and Food Situation Report for September 2017 estimated that crop outputs are below-average in several countries in the sub-region, as the March-May rains were generally erratic and insufficient which resulted in reduced planted areas and yields.

In Rwanda and Burundi, favourable weather conditions in April and May benefited crops and yields are estimated to be average to above-average. In Somalia, crop production has been lower than average, resulting in low domestic cereal supply. In southern Somalia, the 2017 Gu cereal production is estimated to be 37 percent lower than the long term (1995-2016) average, and 9 percent lower than the five-year average (2012-2016). In northwest of Somalia, 2017 Gu/Karan harvest is estimated to be 87 percent lower than the 2010-2016 average. Overall, the aggregate "gu" output is estimated to be about 40 percent below average (GIEWS Sept 2017).

The Rift Valley and Western provinces of Kenya were characterized by a late onset of the long rains and a prolonged dry spell in June which caused moisture stress and crop wilting. Improved rainfall in July and August partly offset the moisture deficits, but some crop damage was irreversible and the maize output is forecasted to be at about 18 percent below average (GIEWS Sept 2017). In Uganda, there is improved food security following favourable rains and first season harvests in agricultural areas despite the FAW infestation. In agro-pastoral areas of the Karamoja Region of Uganda, the cereal harvest which is currently underway, was delayed by a month and crop production is estimated at below-average levels on account of unfavourable rains.

In Ethiopia, crops are progressing well as seasonal "kiremt" rains have been abundant and well-distributed over most cropping areas. In northern and central rainfall areas of South Sudan, weather conditions have been generally favourable. However, agricultural activities continue to be disrupted by protracted and widespread insecurity (GIEWS Sept 2017).

	2015	2016 estim.	2017 f'cast	2015	2016 estim.	2017 f'cast	2015	2016 estim.	2017 f'cast	Change: 2017/2016 (%)
East Africa	**5.3**	**5.3**	**5.4**	**38.4**	**41.7**	**40.8**	**47.5**	**51.1**	**50.0**	**-2.2**
Ethiopia	4.2	4.3	4.3	18.8	19.0	18.9	23.1	23.4	23.3	-0.4
Kenya	0.4	0.4	0.5	4.1	3.6	3.3	4.6	4.0	3.8	-5.7
Sudan	0.5	0.5	0.5	2.9	7.4	7.0	3.4	7.9	7.5	-6.0
Uganda	0.0	0.0	0.0	3.2	2.9	2.9	3.4	3.2	3.2	0.6

Figure 3: East Africa cereal production (million tons) Note: Totals and percentage change computed from unrounded data. Total cereals includes wheat, coarse grains and rice (paddy). Source: GIEWS Crop Prospects and Food Situation Oct 2017

Fall Armyworm (FAW) has infested nearly all Sub-Saharan Africa except for Djibouti and Somalia in East Africa. In South Sudan its appearance has been confirmed since July 2017 with significant crop damage in several areas in six states that include Western Bahr el Ghazal, Eastern Equatoria, Central Equatoria, Northern Bahr el Ghazal, and Jonglei. The pest is likely to continue to spread across new areas and damage to maize crops could be considerable unless appropriate pest management measures are implemented.

LIVESTOCK AND PASTURE PERFORMANCE

The drought across southern and south-eastern pastoral areas has resulted in poor animal body conditions due to lack of pasture and water availability. This has resulted in extremely poor livestock body conditions, high animal mortality rates and a decline of milk production to a record low levels.

As it is depicted in Figure 4, the vegetation conditions are above average over large areas of western South Sudan, northern Ethiopia, northeastern Uganda, and western Kenya, according to NDVI.

However, below-average conditions have prevailed in southern Somalia, southeastern Ethiopia. These below-average conditions are particularly concerning in Somalia, current rainfall deficits and poor vegetation conditions could be indicative of a poor start of season.

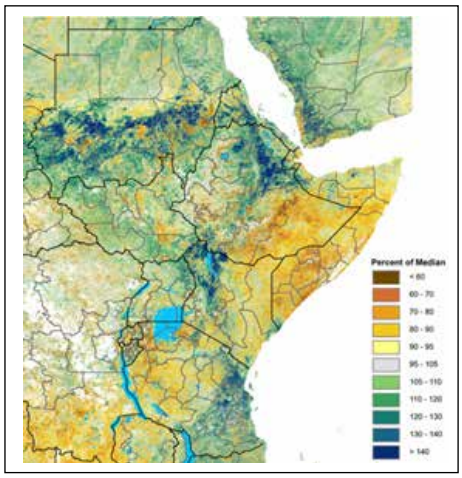

Figure 4: eMODIS/NDVI percent-of-normal, anomalies (2007-2016), October 1 - 10, 2017 (Source: USGS/FEWS NET)

MARKET TRENDS ANALYSIS

Maize grain was the most traded commodity in the sub-region followed by dry beans, rice and then sorghum. Maize, sorghum and beans prices have been following seasonal trends but remain elevated in most markets due to reduced availability from the drought-affected outputs of the 2016 second season and the 2017 first season.

Maize prices in Uganda decreased from record high as recently-harvested crops increased supplies but remained up to 20 percent higher than 12 months earlier. Similarly, in Kenya, maize prices declined by 20-40 percent between May and August, following increased imports from neighbouring Uganda and the harvest in south eastern and coastal areas. However, prices of maize remained up to 60 percent higher than one year earlier as shown in Figure 5. The sub-regional cross border trade could not satisfy the demand gap in Kenya, resulting in Kenya importing maize from Mexico and Zambia from June through end of October 2017.

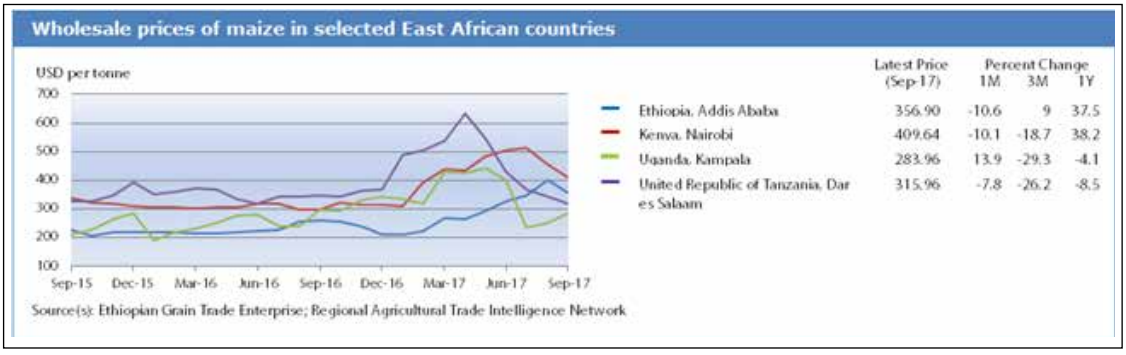

Figure 5: Wholesale prices of maize in selected east African markets (USD/tonne). Source: Regional Agricultural Trade Intelligence Network; Ethiopian Grain Trade Enterprise (GIEWS Sept 2017).

The price of maize in South Sudan and Ethiopia markets continues to increase, with progression of July-September lean season and dependence on market purchases. In South Sudan, the prices of maize and sorghum declined by about 13 percent between June and August 2017. But, it remained about 12 times higher compared to the same period two years earlier. This is driven by widespread insecurity and hyperinflation. In Ethiopia, prices of maize almost doubled between January and August, as seasonal increases were exacerbated by the poor performance of the "belg" harvest. In August, prices were up to 70 percent higher than a year earlier and at record levels in all monitored markets. In Somalia maize and sorghum prices follow seasonal trends, but remain well above the five-year average.

MARKET TRENDS ANALYSIS, Cont'd.

Terms of trade (ToT) across the sub-region has been variable.

The livestock to cereal ToTs continue to deteriorate in pastoral areas of Kenya as livestock prices declined and maize prices increased. Increased goat prices since June coupled with the declining prices for maize grain improved the purchasing power of pastoral households in Karamoja area, Uganda. In Burundi the ToTs began to marginally decline since September as agricultural labour demand and wages decline and beans prices start to increase. The Ethiopian market of Dire Dawa has had favourable shoat to cereal ToTs in pastoral market (FSNWG Sept 2017).

According to the East Africa Cross Border Trade Bulletin, livestock exports from Ethiopia to Somalia dropped by around half (53%), compared to the same time in 2016 due to the drought situations. However, Somalia increased its cattle exports to Kenya in the last quarter (Aug - Sep) by 49%, continuing an increasing export trend over the last 4 years. Livestock prices are expected to decline seasonably until the second quarter of 2018.

NUTRITION SITUATION

According to the FSNWG Sep 2017 report, the nutrition situation in East Africa continues to be of great concern. In Kenya, levels of Severe Acute Malnutrition (SAM) and Moderate Acute Malnutrition (MAM) are much higher compared to 2015 and 2016, with 420, 674 children requiring treatment of acute malnutrition. In Ethiopia 172, 265 children with SAM have been admitted and 376,000 children with SAM are expected in 2017 based on the latest IPC Acute Malnutrition classification.

In Somalia and South Sudan acute malnutrition has reached critical levels in many areas. According to the FSNWG Sep 2017 report, the nutrition situation in Somalia continued to deteriorate over the past one year. Food insecurity, morbidity and lack of milk are contributing factors to this. At the national level, the median prevalence of acute malnutrition (GAM) has increased from Gu 2016 from serious (14.5%) to critical (17.4%) in Gu 2017. In South Sudan, 82% of surveys showed critical malnutrition levels of greater than 15 percent and seasonal reduction from October to December is not expected this year due to hyperinflation and insecurity.

SUMMARY AND FOOD SECURITY OUTLOOK

The sub- region has not recovered from impacts of consecutive droughts and conflict in several places and as result around 24 million people are facing crisis above IPC phase 3+ and are in need of humanitarian assistance. Main areas of concern in this regard include Somalia, south-eastern Ethiopia, pastoral areas of Kenya, and South Sudan.

While there will be somewhat improvements in the food security situation in Ethiopia and Uganda with anticipation of fresh crop harvest, the situation in Burundi and Rwanda expected to deteriorate during the lean season by the end of the year. Pastoral communities in Arid and Arid Semi-Arid areas of the sub-region are not expected to recover much given the sever impact of several consecutive below average rainy seasons.

Refugees' influx continue to Uganda due to the conflict in South Sudan. The issue of refugees' influx and the magnitude of impact of these refugees on food security outcomes in Uganda needs to be critically analysed.

ANNEX 1: COUNTRY SPECIFIC SITUATIONS SUMMARIES AND RECOMMENDATIONS

Country specific situation summary	Recommendations
Somalia: A combination of factors that include consecutive poor seasons since 2016, below-average 2017Gu season performance, above-average food prices, livestock losses and likelihood of below-average 2017 Deyr by end of year exacerbates the food insecurity situation in Somalia. It is estimated that currently over 6.2 million people are in need of emergency food or livelihood support, including over 3.1 million in Crisis & Emergency (IPC 3 and 4) who require urgent humanitarian assistance through Dec 2017. Below-average to poor 2017 Gu (Apr-Jun) rains in 2017 Deyr (Oct-Dec) rains are expected to be mostly average to below-average.	• Populations in Crisis and Emergency (IPC Phases 3 and 4) should be the primary targets of food security and livelihoods support programming. • Populations in Emergency (IPC 4) deserve special attention given the risk of increased mortality.
South Sudan: The food security situation of South Sudan is worsening mainly due to disrupted trade, constrained humanitarian access and livelihoods by conflicts, poor macroeconomic conditions constraining household market access, and the possible below-average production in 2017. Around 6 Million people were estimated to be under IPC phase 3 and above during June-July 2017 and 1.7 M on the brink of famine (Phase 4 & 5). Although no major changes has been observed on the driving factors that contributed to this crisis, the current situation will be informed by the IPC analysis which is currently under review and expected to be released soon. The situation in green belt areas of South Sudan remain extremely concerning. The rainfall situation has been favourable in most areas. Unfortunately, due to the ongoing conflict in the majority of the high producing two-season areas, a large number of farming households have been displaced - as a result most of the productive lands have been left unutilised.	• Response planning should be developed timely based on the outcome of the IPC report which is expected to be released soon. • End of season crop assessment mission needs to be carried out to determine the performance of the season and establishment of the food gap and food balance sheet. • Sustained sensitization and capacity building of farmers, extension agents on the occurrence and management approaches of the FAW is important.
Ethiopia: Large areas of Somali region of Ethiopia remained in Crisis and Emergency food insecurity situation due to failed 2016 Deyr and 2017 Gu seasons which resulted in loss of livestock and income sources. It is thus estimated that about 8.5 Million People in need of humanitarian assistance from August 2017. Crisis situation in parts of Amhara, Tigray, and north eastern SNNPR to ease from October when Meher harvests begin. However, production is estimated and will be below-normal in parts of SNNPR, Oromia, and Somali regions. Fall Army worm has been reported in 374 woredas in six regions. Approximately 22 percent of maize planted areas infested (378,158 of 1.7 million hectares) in Meher rain dependent areas.	• End of season assessment is required to establish crop annual harvest and possible food gaps that will guide annual response planning work. • Awareness raising, mass communication and training of farmers on how to control FAW infestation through integrated pest management approach is required for minimising the negative impact of FAM.
Burundi: Slight improvement in food security situation to IPC Phase 2 in most areas over July–September period due to relatively good 2017 B season harvest. Overall, 1.76 Million people (18%) currently under IPC phases 3 & 4. Food insecurity expected to deteriorate during the October- December 2017 lean season as HHs deplete food stocks coupled with limited access to markets-27% (2.6 Million) will be in IPC Phases 3 & 4).	• Close monitoring of market prices is highly crucial for taking appropriate and timely action to avert the food access problems that might be arise due to depletion of stocks during the lean season.

ANNEX 1: CONT'D

Country specific situation summary	Recommendations
Kenya: The level of food insecurity in Kenya has deteriorated since last analysis with an estimated 2.6 million people in need of humanitarian assistance (2.1 million in IPC Phase 3 and 500,000 in IPC Phase 4). About 13 counties are experiencing IPC Phase 3 (Crisis), while 0.8 million people in 10 counties are facing Stressed (IPC Phase 2) outcomes, with the likelihood of deteriorating into Crisis (IPC Phase 3).Without immediate and up-scaled humanitarian assistance, populations in Phases 3 and 4 in these 23 counties may deteriorate as the dry spell progresses. The key drivers of the severe situation in the most affected counties are consecutive poor rainfall seasons, high food prices, poor pastures, high livestock migration, low agricultural production levels, infestation of African and Fall Army Worm, human-wildlife conflicts as well as resource based conflicts and insecurity.	• It is recommended to provide emergency relief operations as well as resilience building initiatives in the most affected areas to preserve household food consumption as well as income generation. • Close monitoring of the food security situation focusing on food prices, effects of armyworm invasion on maize production, and terms of trade is important.
Uganda: Overall, improved food security situation is recorded at national level following favourable rains and first season harvests in agricultural areas-despite Fall Army Worms infestation during growing season with impact on production. Forecasted near-normal to above-normal Oct-Dec rains will support second season (agricultural areas) and sustain the livestock sector (Karamoja). It is reported that funding short falls for food and cash transfers could place those in urgent need at risk over September–February.	• Close monitoring of the FAW infestation and taking appropriate management measures important • Refugees' targeted programme development is important to address the food insecurity situation of South Sudanese refugees sustainably.
Rwanda: The situation is generally stable and is classified as Minimal (IPC Phase 1) acute food insecurity due to Season -B production. The dry conditions in July-August could have possible impact on Season C production and livestock body conditions, pasture and milk availability through reduced fodder and water–impact on livelihoods depending on livestock. Food insecurity to worsen during October-December main lean season starts given that food prices have been above 5-year and 2016 averages limiting access. Food security improvement expected from December/January after season-A harvests enhance food availability.	• Close monitoring of market prices and take prices stabilisation measures might be required.
Djibouti: The October-to-February rainy season is expected to be average or above-average which could increase increasing availability of pasture and water resources through January.	• Relevant agricultural related interventions is highly recommended to use of the good prospect of the Oct – Feb rain.
Sources: FSNWG monthly update and statements, FSNAU special brief, FEWS NET reports, FAO/GIEWS reports, South Sudan crop prospect report, Kenya's IPC communication brief	

This update is prepared using various data and information sources that include NOAA climate prediction centre, the IGAD Climate Prediction and Application Centre (ICPAC), the Food Security and Nutrition Working Group (FSNWG) September 2017 report, East Africa Cross border Trade Bulletin October 2017, FEWS NET, GIEWS FPMA Tool monitoring and analysis of food prices, FEWSNET EWX maps and FAO Food Chain Crisis Early Warning Oct-Dec 2017.

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