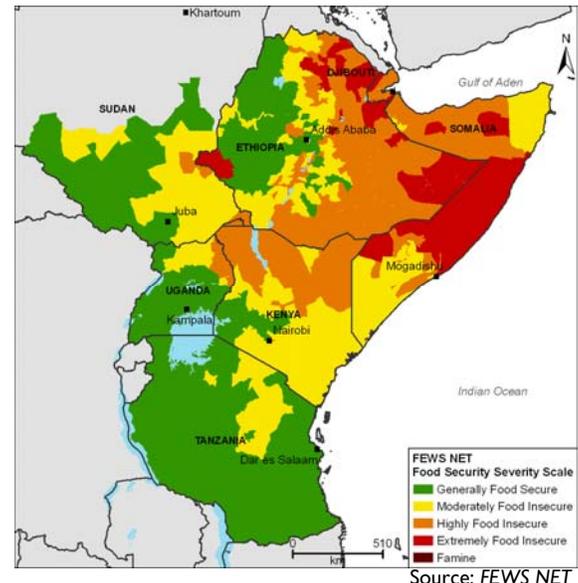


EAST AFRICA Regional Food Security Update

April 2010

- As expected, there have been distinct improvements in food security conditions over Kenya, Tanzania, and southern Somalia due to the extended favorable October-December cropping season. Rangeland conditions have also improved due to the early and widespread heavy rains currently being experienced in the region.
- High and extreme levels of food insecurity are concentrated in southern Sudan, the eastern half of Ethiopia, and central and northern Somalia. An early start to the lean season is expected in these areas (due to poor performance of the past agricultural season), with the peak of the hunger season between April and July. Impeded market and humanitarian access are expected to increase the size of the food insecure population and humanitarian needs over the next 3-4 months.
- Food prices are exhibiting downward trends in response to increased short-term food availability resulting from harvests in the last quarter of 2009. However, prices are still above the five-year average in most countries. The increase in global petroleum prices, to about 21 percent above the five-year average, is also maintaining high prices.
- Rains throughout the eastern sector of the region indicate a timely or even early start of the March-May season in nearly all areas that normally receive these rains. The rains are also heavier than normal, which is attributed to the lingering effect of the El Niño event as well as the current expansive abnormal warming over the Indian Ocean. The rains suggest favorable cropping conditions in the main cropping areas, although they could also lead to localized flooding. However, there are strong indications from the ECMWF forecast that the rains could gradually decrease in April and cease in early May, which could undermine the performance of late-planted crop. Close monitoring and advance warning of an early cessation of the rains are critical.

Figure 1. Current food security conditions, March 2010



Food security overview

As expected, distinct improvements in food security have occurred in Kenya, Tanzania, and southern Somalia due to the extended favorable October-December 2009 season. The El Niño rains during this season led to better-than-expected production in the marginal agricultural lowlands of most countries, and ended the prolonged consecutive droughts experienced in the pastoral areas. Further improvements in the rangelands are expected to occur during the March-May 2010 season, especially with the timely start of season and the widespread occurrence of heavy rains throughout the eastern sector, boosting water and pasture availability. This will reinforce the recovery process of pastoral livelihoods, which faced drought conditions in the first half of 2009 resulting in the loss of assets.

Currently, high to extreme food insecurity is concentrated in areas that experienced poor agricultural production in the 2009 season in Ethiopia (especially the northeastern highlands) and the pastoral regions of Afar and Somali; southern Sudan, and northern and northeastern Uganda, leading to an earlier than normal onset of the hunger season. In addition to

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poor agricultural production, ethnic conflict and civil insecurity continue to impact food security, especially in southern Sudan and central Somalia, where conflicts are increasing in complexity and spatial scale and are a threat to general food and humanitarian access and cultivation activities for 2010. In southern Sudan, a combination of tribal hostilities, resource-based conflicts, and political tensions has affected between 500,000-600,000 people through the impacts of population displacement. The lingering effects of security-related market and trade restrictions in the Somali region of Ethiopia are also affecting the pace of recovery of pastoral livelihoods in this region despite enhanced rainfall performance in the March to May season.

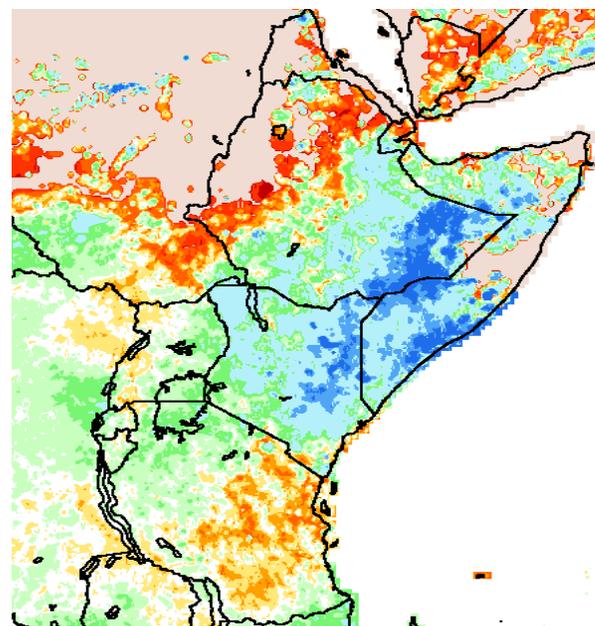
Seasonal Progress

Latest satellite data show widespread occurrence of rains across the region, signaling a timely onset of the March-May season (Figure 2). These rains are particularly heavier than normal in the eastern sector, which could be attributed to the lingering effects of the El Niño event as well as the expansive abnormal warming of the Indian Ocean in the adjacent areas of the eastern sector. The continued occurrence of above-normal conditions over the pastoral areas of southeastern Ethiopia, southern Somalia, and the eastern half of Kenya (especially around the Kenya-Somalia-Ethiopia border, which experienced an extended period of favorable rains during the October-December season) will continue to increase pasture biomass and water and improve pasture conditions (Figure 3). These improvements are essential for the recovery of these areas from the recent severe droughts of 2007/2009. There is already a significant decline in the livestock trade volumes from southern Ethiopia, which is a strong indication of optimism of a good season ahead, motivating pastoralists to withhold their stocks for herd multiplication. A drier-than-normal rainfall situation in central and northeastern Tanzania may negatively affect crop maturity in some areas, but the season is ongoing and will need to be monitored closely.

The heavier-than-normal rains have also caused localized flooding with adverse impacts through loss of assets, transport disruption, some population displacements in Kenya, Somalia, and Uganda (e.g. coastal lowlands, parts of the southeastern lowlands and Rift Valley areas in Kenya; northeastern Uganda; and along parts of the Juba river in Somalia). Despite these effects, the overall benefits in terms of agricultural production, water resource recharge, and hydro-power generation outweigh these adverse impacts.

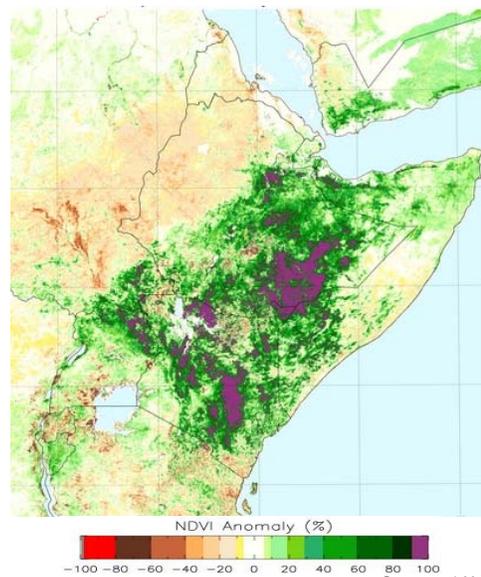
There are strong indications from the ECMWF long-term forecast that the current rains will continue until late April and gradually cease in early May, especially in the eastern sector. This could result in a potentially shorter-than-normal cropping season, which could undermine the performance of the late-planted crop during the March-May season. Therefore, close monitoring and advance warning of an early cessation is advised.

Figure 2: Rainfall Estimates (Percent of Normal) – March 1- April 6, 2010



Source: USGS/FEWS NET

Figure 3: Vegetation Conditions up to March 21-31, 2010



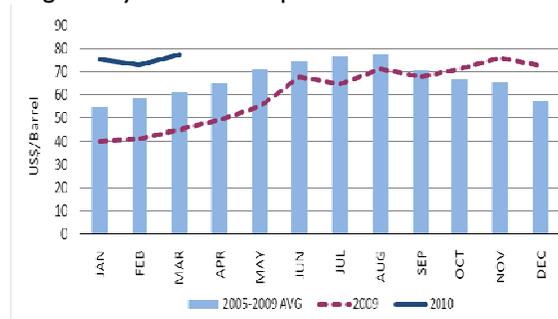
Source: NASA/GSFC

Markets and Trade

In general staple food prices indicate a general decline in response to short-term increases in availability from the October-December cropping season. In most countries, main staple food prices are beginning to come down below the five-year average, a level they have remained above in the last two years. This could improve food access through market purchases for poorer households. In a few areas like central Somalia, staple food prices remain high/increasing due to poor production and civil insecurity (See Price Annex). Although the general decline in prices is beneficial for net food importing countries and net food buying households, this decline is unlikely to be sustained due to the steady increases in global fuel oil prices, which increase overall production costs through its effect on transportation and production costs. The current price of crude oil is

21 percent higher than the five-year price and 42 percent higher than last year's price in March (Figure 4). These trends will continue to sustain food prices above the five-year average thus affecting food access for market-dependent households.

Figure 4: Average spot price of crude oil weighted by estimated export volume



Source: US Energy Information Administration

Conclusion

Timely start of the March-May seasonal rains has brought relief to the pastoral areas that have faced drought conditions and loss of assets in the period preceding the October-December 2009 rains. The current heavier-than-normal rains experienced in the eastern sector as a result of the lingering effects of the 2009/10 El Niño with the expansive warming of the Indian Ocean water adjacent to the eastern sector will boost rangeland conditions and contribute towards significant recovery of pastoral livelihoods. However, efforts to support pastoral area recovery, such as veterinary service provision, are essential.

Although current rains are heavier-than-normal in the eastern sector of the region, there is a strong possibility of an early cessation of the seasonal rains, which could affect the late-planted crops. This pattern could affect food production in the marginal agricultural lowlands, which are prone to erratic rainfall. Therefore, closer monitoring of seasonal performance will be conducted. Early planting is advised to take advantage of the timely onset and heavier-than-normal start of season.

Overall, the population facing high or extreme food insecurity has reduced marginally from the over 17 million people estimated before the October-December 2009 rains. This marginal decline results from improved rangeland conditions, improved animal production among pastoral areas, and better crop harvests in agropastoral and marginal cropping areas, that have faced consecutive poor crop performance before the recent/current rains.