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Key Messages:

- As of May 2018, 28.5 million people were food insecure, an increase from 25.7 million in May 2017 in Kenya, Somalia, South Sudan, Ethiopia, Burundi, Uganda and Sudan.
- While the abundant rains from March-May benefited crops and rangelands, it also triggered widespread floods. Over 1.6 million people are currently affected by floods, with over 400,000 displaced in Somalia, Kenya and Ethiopia (FSNWG May 2018).
- Seasonal rainfall as of late April was well above average across large areas of Eastern Africa, including in much of Somalia, Kenya, southern and eastern Ethiopia, Rwanda, Burundi, and Uganda. The season was also characterized by timely onset with fair spatial distribution across equatorial parts of the region.
- According to the latest GHACOF rainfall outlook there are higher chances of above normal rainfall over much of South Sudan, parts of central and western Ethiopia, northern Uganda and north-western Kenya. There are increased chances of normal to above normal rainfall over much of Uganda, central Sudan, western Kenya and parts of south-eastern Ethiopia.
- Prices of cereals remained mostly stable or had declined by May throughout most of the sub-region and were around or below their year-earlier levels.
- The availability of pastures and water in parts of the sub-region has improved livestock body condition leading to increasing livestock prices. This has improved the terms of trade (ToT) between small ruminants (sheep and goats) and maize in several markets, allowing households to obtain more cereals from sale of a livestock.



Rainfall Update

Seasonal rainfall as of late April was well above average across large areas of Eastern Africa, including in much of Somalia, Kenya, southern and eastern Ethiopia, Rwanda, Burundi, and Uganda. The season was also characterized by timely onset with fair spatial distribution across equatorial parts of the region. The percentage of the long term average (% of LTM) showed enhanced rainfall conditions of above 176% observed over south-eastern Ethiopia, Somalia, Uganda and Kenya. Much of Rwanda, Burundi, and South Sudan, also received more than 127% of their LTM.

While above average rainfall contributed to favorable crop development, over many areas it led to flooding along major basins of the region exacerbating damaged infrastructure and led to displacement of populations. The tropical cyclone that hit the northern part of Somalia caused massive flooding that exacerbated death of people and destruction of properties. Up to mid May 2018, heavy rains continued to fall across Somalia and the Ethiopian highlands.

Some areas of Somalia and south-eastern Kenya that had performed poorly in previous consecutive seasons had received good rainfall during March to June 2018 season, improving conditions. Other areas with good improvement from the rainfall performance include western parts of region including Rwanda and Burundi.

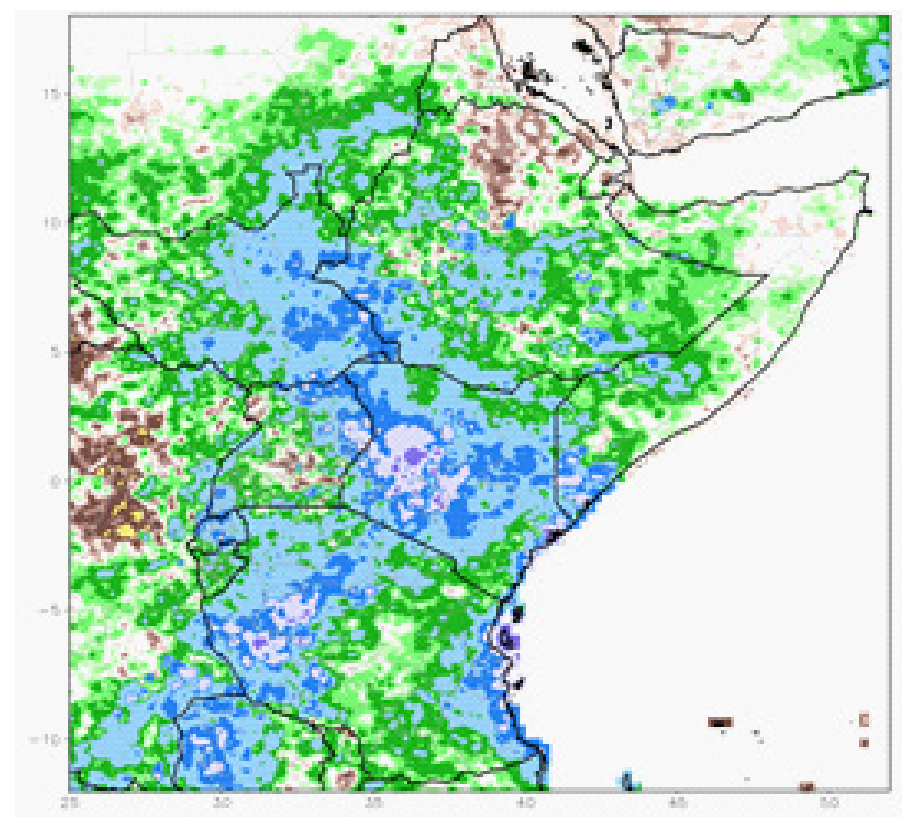


Figure 1: 90 days anomaly cumulative rains from 18 December 2017 to 17 March 2018. Source: NOAA, 2018.

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Climate Outlook

According to the latest GHACOF rainfall outlook for June to September 2018 there is an increased likelihood of above normal rainfall over much of the northern sector of the region. There are higher chances of above to normal rainfall over much of South Sudan, parts central and western Ethiopia, northern Uganda and north-western Kenya. There are increased chances of normal to above normal rainfall over much of Uganda, central Sudan, western Kenya and parts of south-eastern Ethiopia (Figure 2). With this outlook it is likely that episodic heavy rainfall events leading to flash floods might occur even in areas with an increased likelihood of near to below normal rainfall.

The outlook also shows several parts in the northern and western sectors of the region with likelihood of timely onset but with early cessation of rainfall. It is noteworthy that much of central Uganda together with pocket areas in Ethiopia and Sudan are likely to experience delay in the start and also have early end of the seasonal rains.

The June to September forecast also indicates increased probability for excess rain, with prospect for flooding risks, mainly in the countries north of the equator. The flood prone areas in the countries are at increased risk of both flash and riverine floods. Accordingly, Sudan, South Sudan, Ethiopia, and Djibouti are at increased likelihood of flood risk. Northern parts of Kenya and Uganda are also expected to receive above normal rains which need to be monitored closely (GHACOF EW bulletin).

The El Niño–Southern Oscillation (ENSO) remains neutral. However, latest model outlooks and recent warming in the tropical Pacific Ocean indicates that the chance of El Niño forming has increased.

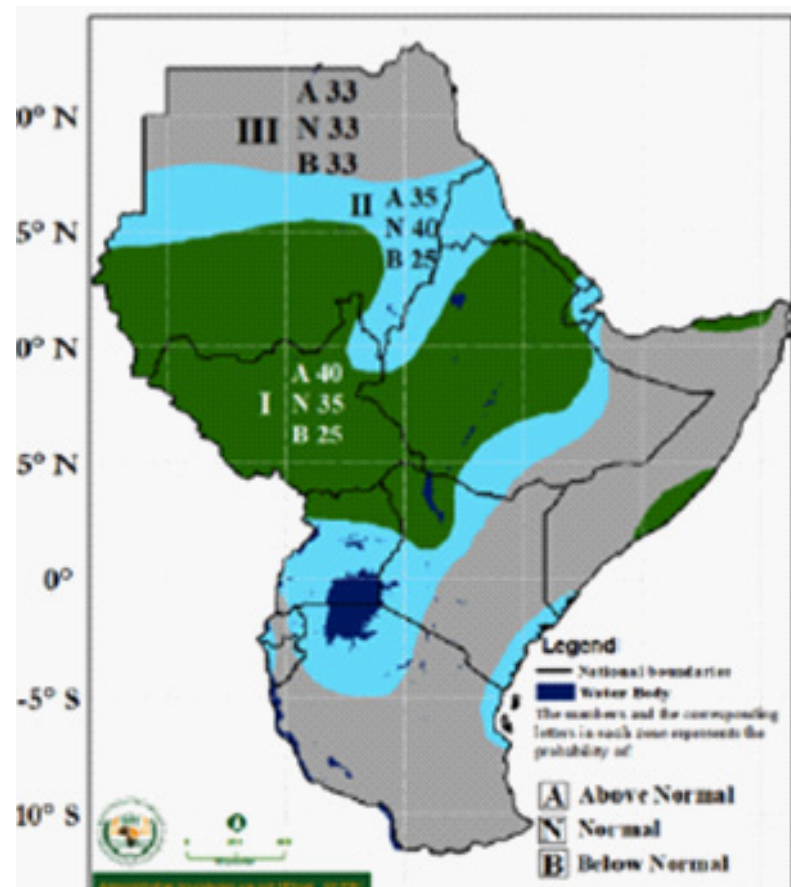


Figure 2: GHACOF climate outlook for June–Sep 2018.. Source: IGAD Climate Prediction and Application Centre (ICPAC)/ GHACOF, 2018.

Crop Production

According to the Crop Prospects and Food Situation Report for June 2018 the March to May rainy season was characterized by heavy rainfall in the sub-region, with cumulative rainfall estimates up to twice the long-term average (1982-2012). The rains had a positive impact on crop establishment and development, and as a result crop prospects for the 2018 first season are generally favourable.

Heavy rains also triggered widespread floods, mainly in central and southern Somalia, south-eastern Ethiopia and Kenya, which resulted in loss of life, displacement, damage to farmland and livestock deaths. In Somalia, the damage to about 14 000 hectares of cropped land occurred in the high potential riverine irrigated areas of Juba, Gedo, Hiran and



Lower Shabelle regions which is expected to result in a substantial production shortfall of the “gu” crop.

According to the IGAD Crop Monitor report, countries placed on the watch list include Rwanda and Burundi for rice and beans, and Kenya for main season maize mostly due to water logging and flooding. Kenya received significantly above average rainfall causing waterlogging and flooding with negative impacts on crop conditions in these areas, aggravated by fall armyworm infestation. This is true for all regions except north Rift region where conditions are generally favourable. Poor conditions have been reported in Rwanda due to extensive damage to rice and beans due to waterlogging and flooding. In the eastern part, conditions were favourable where rainfall supported good growing conditions for maize and beans. In Burundi rains were good, resulting in favourable crop conditions, including for banana and beans, which are the predominant crop in the current season. Limited areas experienced heavy rains at the early stage of planting, causing damage and slowed development. Growing conditions in Ethiopia are favourable throughout the entire country except SNNPR region where crops have been affected by water logging and are under watch conditions. In Uganda crop conditions are favourable across the country with both rainfall amounts and vegetation conditions above average. Incidences of flooding, waterlogging and mudslides in the country are isolated and have not had widespread negative impacts on crop growth (IGAD crop monitor report).

In central and southern parts of the sub-region, including Burundi, Rwanda, eastern Kenya, southern Somalia and Uganda, harvesting of the 2018 main season cereal crops is underway or about to start.

Livestock and Pasture Performance

The heavy rains have resulted in good vegetation conditions across the region, as shown by the Normalized Difference Vegetation Index (NDVI) chart (Figure 3). In northern and eastern Kenya, south-eastern Ethiopia, central and northern Somalia, which experienced the most severe rainfall deficits during the previous three rainy seasons, have had marked improvements in vegetation conditions and regeneration of rangelands.

Rainfall surpluses have resulted in the complete recharge of most water sources and decreased livestock trekking distances to watering points from grazing fields (Crop Prospects Report June 2018).

Vegetation cover in Somalia shows significant improvement due to favourable rains in April and May. As a result of above average Gu rains in April and May in most areas, livestock body condition, pasture conditions, as well livestock conception have shown optimum improvement. Milk production improved at household level particularly, milk from small ruminants, while milk from camel and cattle is expected to improve over the coming six months.

In Djibouti, the March-June Diraac/Sougum rains has helped to restore pasture and water resources but the range land conditions in southeast pastoral border livelihood zone, north and north-west of Obock city have not fully recovered. Despite the received rains, livestock body condition has not adequately improved to promote sales. The ToT for livestock to rice/wheat flour remain poor and are not expected to improve during the June-September season.

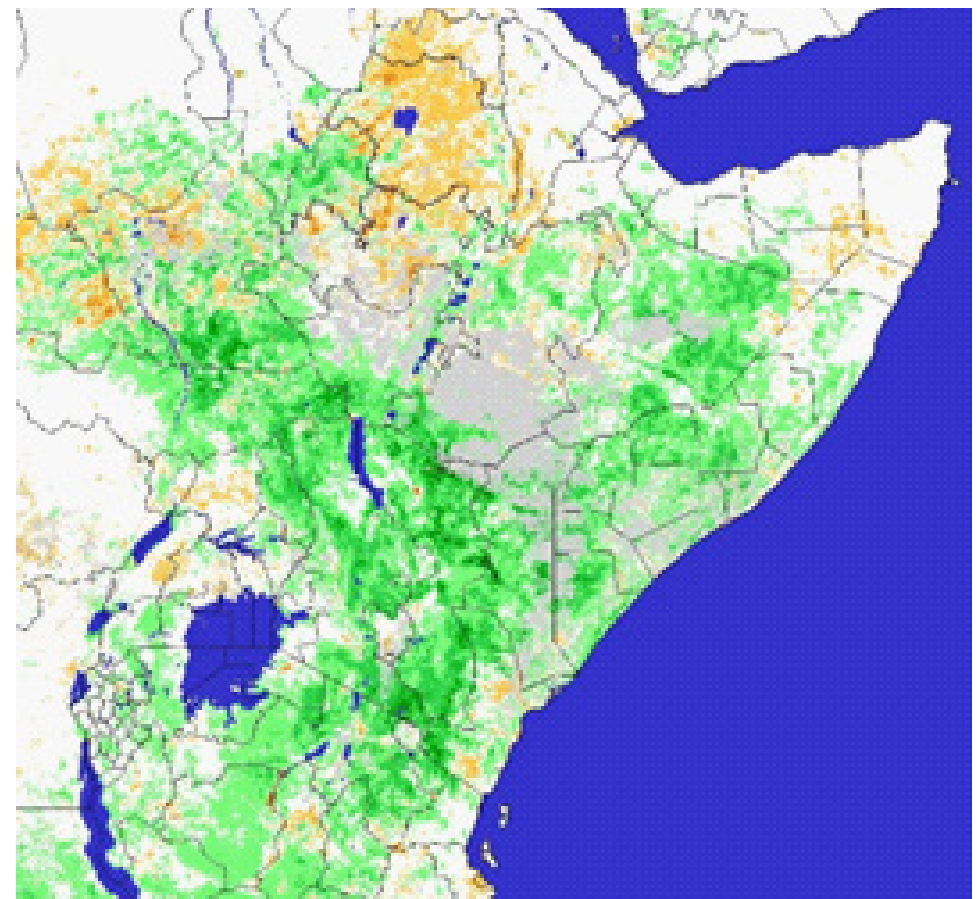


Figure 3: eMODIS/NDVI percent-of-normal, anomalies (2007-2016), 25 May – 6 June, 2018.

Market Trends Analysis

The FAO Food Price and Monitoring Bulletin indicated that the prices of cereals remained mostly stable or declined in May throughout most of the sub-region and were around or below their year-earlier levels. In South Sudan, the prices of cereals have been rising, and are at exceptionally high levels due to overall tight supplies, a weak local currency and widespread insecurity. The prices of sorghum increased by 10-20 percent between January and April, when they were about 30 percent higher than the already high levels a year earlier and five times higher than 24 months earlier.

Prices of maize in Uganda declined slightly in May with the green crops from the 2018 first season harvest, which is anticipated to be at above average levels (Figure 4). Prices in May were less than half their high values a year earlier reflecting the good production in 2017 after the drought reduced crops in 2016. In Kenya, prices of maize declined by 10-15 percent between February and April as the “short-rains” harvest, completed in March in south-eastern and coastal marginal agricultural areas,

boosted market supplies. However, prices were stable or continued to decline and were well below the levels in May last year, when drought conditions affected crop production, mostly as a result of sustained imports. In Rwanda and Burundi, prices of maize were mostly stable in May and at levels about 30-40 percent below those a year earlier. In Ethiopia, prices of maize increased seasonally in May and were generally higher than their values a year earlier, supported by a weaker currency, after a 15 percent devaluation against the US dollar in October 2017.

For beans by March, the price of beans was slightly above the 5-year average although lower than the 2017 levels in most major markets. Prices in Kampala, Bujumbura and rural Rwanda were on the increase unlike Nairobi where they were declining. The prospects is that the price of beans will increase until June/July when supplies to markets from the on-going season will start (FSNWG June 2018).

The availability of pastures and water in parts of the sub-region which received good rainfall in the past few months has improved livestock

Wholesale prices of maize in selected East African countries

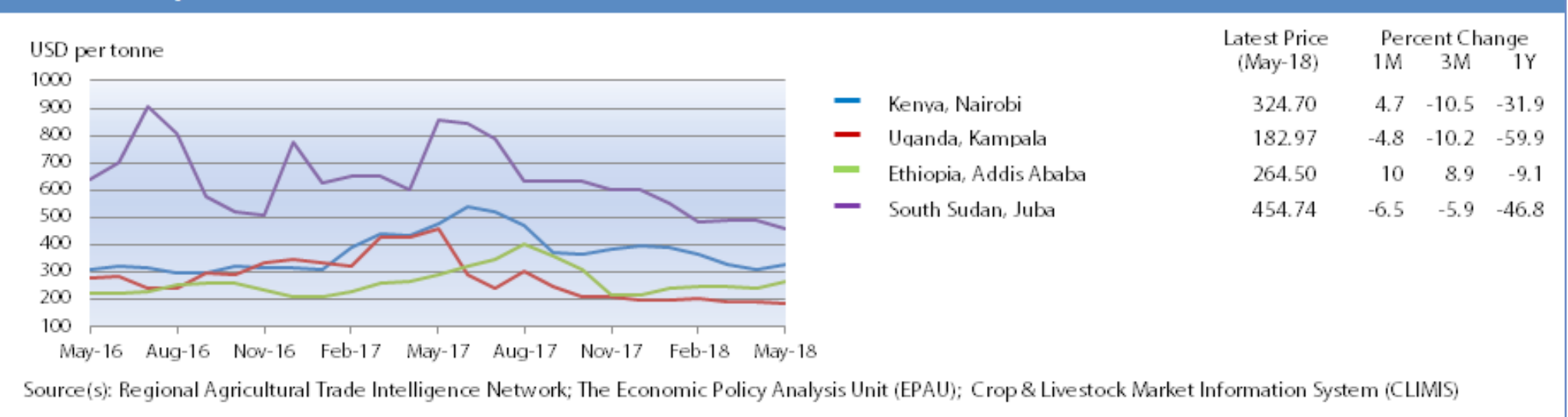


Figure 4: Wholesale prices of maize in selected east African markets (USD/tonne). Source: Regional Agricultural Trade Intelligence Network.

Market Trend Analysis

... body condition since the start of the rainy season leading to increasing livestock prices. This has improved the terms of trade (ToT) between small ruminants (sheep and goats) and maize in several markets, allowing households to obtain more cereals from sale of a livestock. Market reports from Ethiopia, South Sudan and Karamoja show improved ToT for March/April compared to previous month and a year ago (FSN WG, May 2018).

According to the Food Security and nutrition Analysis Unit of Somalia (FSNAU) recent update, the ToT between goat and cereals were

higher across Somalia due to increased goat prices and/or decrease in cereal prices. Livestock prices for local quality goat and camel mostly exhibited mild to moderate increases in most regions in May 2018 due to improved body conditions attributable to increased availability of water and pasture and increased demand during Ramadhan season. Compared to a year ago (May 2017), most regions in Somalia exhibited increases in goat and camel prices due to improved body conditions as a result of better rainfall performance this year which increased water availability and pasture (FSNAU, June 2018).

Nutrition Situation

Nutrition situation remains critical with sustained levels of acute malnutrition in parts of Kenya, Ethiopia, South Sudan and notable improvements in some parts of Somalia based on the January- March country level assessments. Currently the number of children expected to suffer from severe acute malnutrition in 2018 in Central and Eastern Africa is over 3.9 million (children aged 6-59 months).

According to the IPC recent report, the nutrition situation in South Sudan is expected to deteriorate significantly as a result of unprecedented levels of food insecurity, high morbidity, outbreaks of diarrhoea and other illness, poor infant and young feeding practices as well as limited access to services due to the heavy rains.



Summary and Food Security Outlook

Overall, it is expected that there will be some improvement in the food security situation in the sub-region in the coming months due to the positive rainfall outlook and the current good performance of pasture and grazing. The wide spread rainfall during March-May 2018 has regenerated rangeland for livestock and placed crop establishment in a good position for the growing season. Therefore it is expected that the food



security situation should improve from July as harvests become available. Food security conditions are improving in central and southern parts of the sub-region (Uganda, except the Karamoja Region, Kenya, Rwanda, Burundi and Somalia) as the main season green crops are becoming available for household consumption and increased labour opportunities, associated with agricultural operations (Crop Prospects, June 2018). However in South Sudan the situation is expected to deteriorate during the lean season up until August and September.

It is important to note that flood affected areas are likely to be in a less food secure due to damage caused to infrastructure and displacement of populations in Somalia, Kenya and Ethiopia. According to

Several areas of southern Somalia, food security is expected to improve more than previously anticipated as a result of likely above-average Gu harvests. However, in northern and central regions, poor pastoralists will still have few saleable animals to purchase food. In the absence of assistance, wide areas of northern and central Somalia are expected to be in Crisis (IPC Phase 3), and Emergency (IPC Phase 4) is likely in parts of Northern Inland Pastoral and Aduun Pastoral livelihood zone through May and in Guban Pastoral livelihood zone between June and September (FSNAU, May 2018).

This food security update was prepared using various data and information sources that include NOAA climate prediction centre, the IGAD Climate Prediction and Application Centre (ICPAC) Crop Monitor, the Food Security and Nutrition Working Group (FSN WG) May 2018 report, FAO Crop Prospects and Food Situation Report June 2018, FAO Food Price and Monitoring Analysis Bulletin and the Greater Horn of Africa Climate Outlook Forum (GHACOF) Early Warning Bulletin, Food Security and Nutrition Analysis Unit - Somalia (FSNAU) May 2018 and Bureau of Meteorology.

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