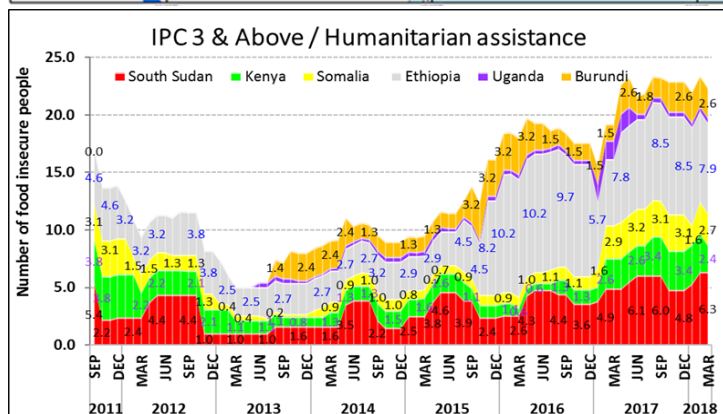
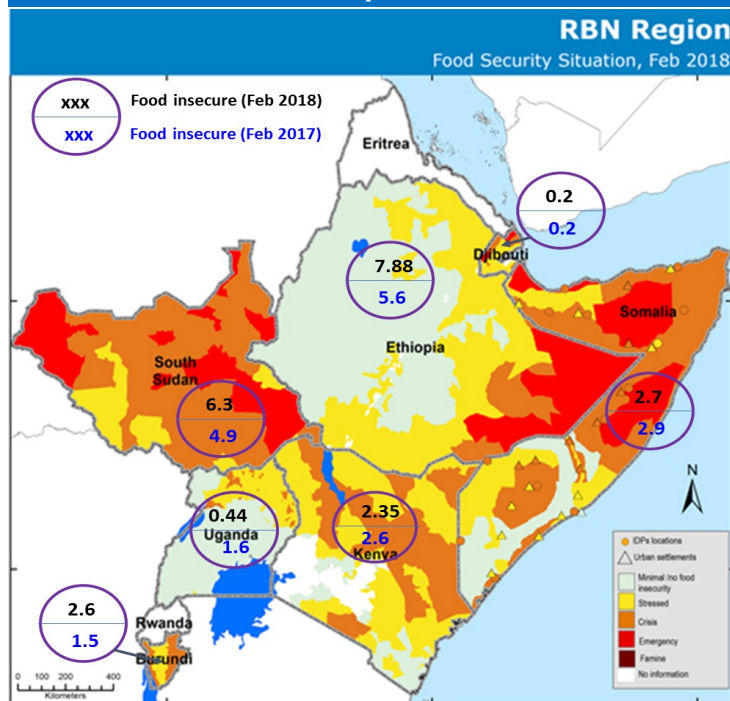


EAST AND CENTRAL AFRICA REGIONAL FOOD SECURITY AT A GLANCE

WFP Regional Bureau Nairobi Vol 4

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Expected Deterioration of the Food Security Situation



Greatest Areas of Concern

South Sudan: Highest ever food insecurity is expected in most areas and particularly emergency situation in parts of Jonglei, Upper Nile, Eastern Equatoria, Western and Northern Bahr el Ghazal. Of worry are counties likely to face catastrophe.

Ethiopia: Southeastern pastoral areas in the Somali region, SNNPR, Afar, parts of Oromiya and Tigray regions have woredas considered as Priority 1 and food insecurity is likely to continue deteriorating particularly in the Somali region due to forecasted below-average rains.

Somalia: central and northern Somalia with projected deterioration in food and nutrition security over February-June period amidst below-average rains in most of the areas.

Kenya: Pastoral and marginal agricultural areas in eastern, southeastern and coastal regions previously affected by drought and with likely below-average rains in coming March-May season.

Burundi: Northern lowlands/ Bugeresa & eastern lowlands.

Food insecurity remains a concern in a number of areas, despite some improvements following seasonal harvests by end of 2017/early 2018. About **22.47 million** people are acutely food insecure compared to **19.3 million** a year ago (excluding refugees). A deteriorating food security situation is expected in the coming months as supply to markets and households stocks dwindle leading to price hikes. South Sudan, Somalia and some pastoral areas of Kenya and Ethiopia are especially of concern.

⇒ Food security trends: current and projected situation

	Oct 2017 - Jan/Feb 2018	March - May 2018
Burundi	Improved	Deterioration in some livelihoods
Djibouti	No change	No change
Kenya	Some improvement	Deterioration in eastern pastoral areas
Uganda	Improved	Deterioration in Karamoja
South Sudan	Some improvement	Deterioration in most areas
Somalia	Some improvement	Deterioration central and northern
Ethiopia	Improved	Deterioration in SE pastoral areas

* Malnutrition still persists in Somalia, Kenya, South Sudan and Ethiopia. Nearly 5.2 million children and pregnant and lactating women are acutely malnourished across the Horn of Africa. Hence, the need to sustain the interventions in 2018.

* The number of refugees continues to increase with 3.35 million being hosted in **RBN region** at the end of Dec 2017. This is in addition to around 5 million internally displaced, driven by conflicts/ insecurity compounded by the effects of drought/ food insecurity/ economic slow down; a situation that increases vulnerability in the region.

* The 2017 Oct-Dec shorts rains were below-average in several areas affecting crop production and slowing rangeland recovery for livestock. The forth-coming March-May season will likely be favourable in most areas but remain of concern in eastern Kenya, much of Somalia and SE Ethiopia where the rains are forecasted to be below-average amidst high temperatures.

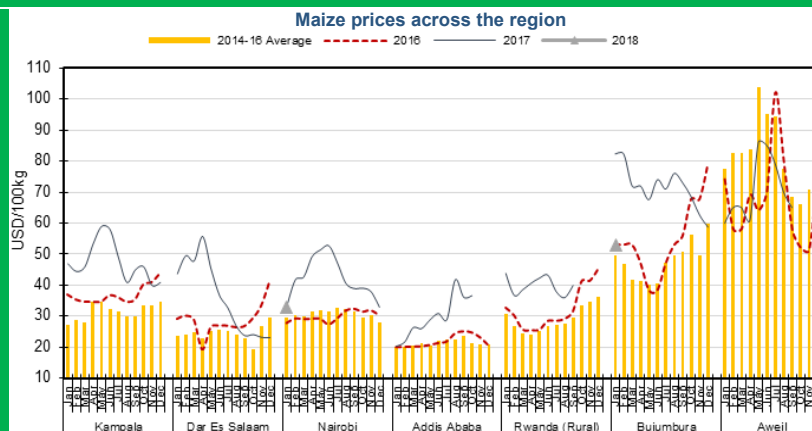
* Funding shortfalls continue to pose challenges to humanitarian assistance by WFP, which may lead to an increase in number of food insecure populations in the region. Sustained humanitarian assistance is required to ensure sustainability of gains made in 2017.

Issues to watch (March - May)

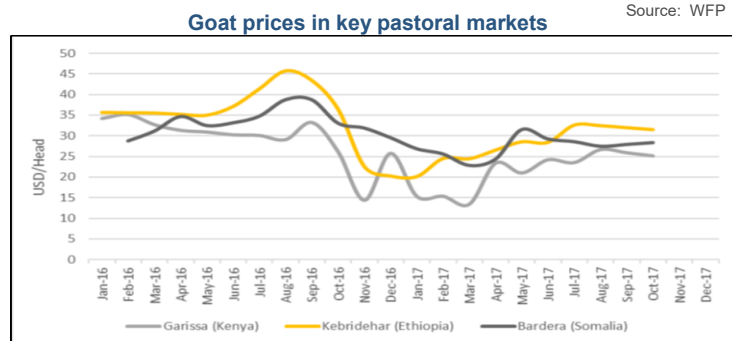
- **Above-average staple food prices** that continue to erode the purchasing power of poor market dependent households. This will be critical as the lean season approaches in a number of areas with households depending on markets for food.
- **Impact of Fall Armyworm** on production in the coming cropping season, especially in Kenya, Uganda, South Sudan, Ethiopia.
- **Onset and performance of the March-May long rains** season especially in pastoral areas of Kenya, Somalia and SE Ethiopia forecasted to receive below-normal rains given that some areas have not fully recovered from the effects of past droughts.
- **Continued conflict/insecurity** in South Sudan and parts of Somalia; **political tensions** in Ethiopia that could increase the burden of refugees and IDPs.
- **Effect of funding shortfalls** on humanitarian assistance among vulnerable populations.

Markets and Trade

- * Wholesale market prices for most staple commodities declined and/or remained fairly stable from end of 2017 through to early 2018, supported by the availability of November-to-January harvested crops.
- * Notably though, staple food prices remained elevated (above-average) across most countries, resulting mainly from the lingering effects of the previous below average cropping seasons across most countries, which continued to maintain overall supplies below normal levels, against sustained high demand. In South Sudan and Burundi, conflict-related trade disruptions and volatile macroeconomic fundamentals sustained elevated staple food prices.
- * With below average supplies likely to persist at least through mid-2018, staple food prices will continue to remain above recent average levels. This will likely be exacerbated by the expected below average upcoming April-June cropping season, as rainfall forecast is poor.
- * Livestock prices across most pastoral areas improved relative to 2016, attributed to improved body conditions due to a favorable October-December rains which increased forage and water availability.
- * However, regional trade in livestock, especially between Ethiopia, Somalia and Kenya, remained below average levels, as supplies to markets remained low. Recent favorable rains saw communities attempt herd rebuilding, reducing livestock available on the market.
- * Cereal-to-livestock terms of trade also improved, albeit marginally, between December and January 2018.

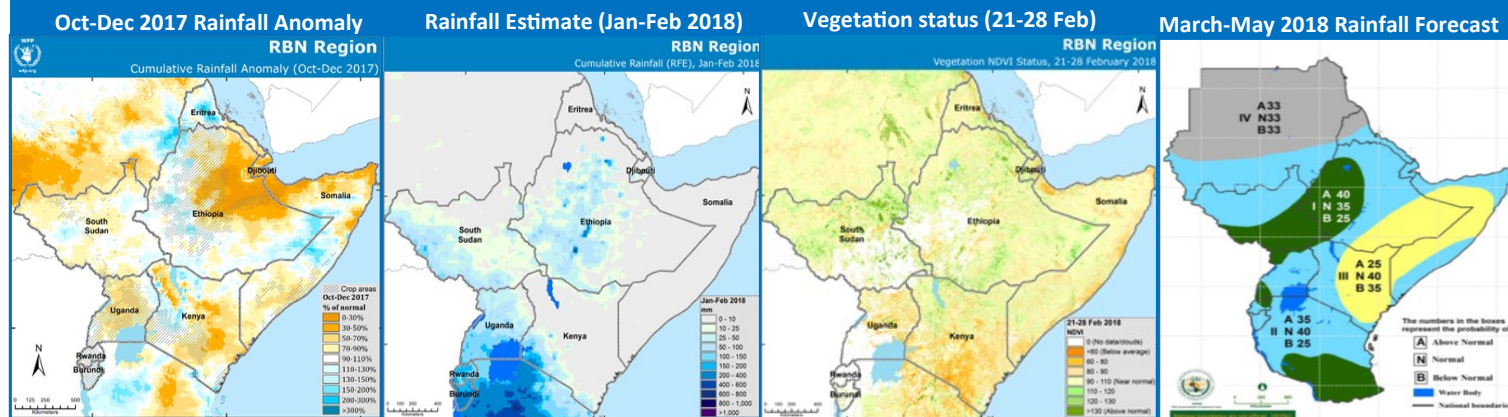


Source: WFP



Source: East Africa Cross-Border Trade Bulletin, Jan 2018

Season Progress and Climate Outlook



- * The Oct-Dec 2017 short rains were below-average in several areas of the region. This negatively impacted on agricultural production in marginal agricultural areas and coastal areas of Kenya, and southern Somalia; rangeland recovery in parts of Kenya and Somalia previously affected by drought.
- * The period from January up to end of February 2018 remained generally dry in most pastoral areas in the region, a situation that is expected to continue until the start of long rains in March/April.
- * By end of February, vegetation condition is below-average in several areas of Uganda, Kenya, Somalia, and Djibouti, which may have resulted in inadequate grazing resources, leading to livestock outmigration. Given the forecasted March-May rains, recovery is expected in northwest Kenya, northern Somalia and Djibouti but deterioration or slow recovery is likely in eastern Kenya, SE Ethiopia and much of Somalia due to forecasted below-average rains.

March-May 2018 Rainfall Forecast

- * GHACOF 48 forecasts near-normal to above-normal rains in most of the region, which will be beneficial to agricultural crop production (Kenya, Uganda, Burundi, Rwanda, equatorial South Sudan and western Ethiopia); support rangeland recovery in northern Somalia and northwest Kenya.
- * Of concern are areas with near-normal to below-normal rains in eastern Kenya, SE Ethiopia and greater part of Somalia, most of which have not fully recovered from the effects of previous droughts.
- * Consecutive below-average seasons in these pastoral areas, coupled with the forecasted high temperatures will slow the full recovery process, compromising food security of livestock dependent households.

On-going/Planned Assessments/Analysis - February to May 2018

- Kenya: 2017 Short Rains Assessment (completion), Food Security Outcome Monitoring, Agriculture value chain analysis & Integrated Context Analysis
- Rwanda: Comprehensive Food Security and Vulnerability Analysis (CFSVA)
- Djibouti: Food Security and Nutrition Monitoring System & Markets study
- Burundi: IPC, FSMS, crop assessment & Integrated Context Analysis
- Ethiopia: Market study in Somali region (analysis)
- Somalia: Food security & nutrition trend analysis; Integrated Context Analysis
- Uganda: Refugee targeting vulnerability study (finalization), FSNA, JAM
- South Sudan: Livelihood assessment (UNS)

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