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Regional Food Security & Nutrition Update

Eastern Africa Region

2022 First Quarter

May 2022

Highlights

- Food insecurity is rapidly worsening in Eastern Africa- an estimated **81.6 million people including IDPs, refugees and host communities** in rural and urban areas are facing high acute food insecurity. This represents about **39 percent increase from the 58.6 million** recorded in November 2021. In Somalia, there is an **increasing risk of famine** in the next two months should the seasonal rains fail completely, and humanitarian food assistance not reach those most in need on time. The overall food insecurity situation is expected to worsen across most countries in the region through the lean season while faced with multiple and overlapping shocks (drought, flooding, macro-economic challenges, and conflict).
- The nutrition situation in the region is critical, with approximately **7 million children under 5 years** expected to be acutely malnourished in Ethiopia, Kenya and Somalia including **more than 1.7 million with severe acute malnutrition**. There is a high likelihood of the nutrition situation deteriorating in the next three months, exacerbated by the high unaffordability of nutritious diets and drought impacts.
- Worsening drought conditions in southern Ethiopia, eastern and northern Kenya, and southern and central Somalia led to severe **water and pasture shortages, livestock deaths, below-average harvests (65 percent in Somalia & 70 percent in marginal agricultural areas of Kenya), sharply increasing cereal and other staple food prices while also eroding household purchasing power**. A fourth consecutive below-average rainfall season is highly likely during GU (march to May) rains complicating the situation. Flooding in South Sudan, which has left large swaths of land inundated for three years in a row continue to limit farming and livestock production, affecting many in the Sudd particularly in Jonglei, Unity and Upper Nile.
- Conflict continues to **increase the severity of food insecurity particularly northern Ethiopia, parts of South Sudan, Sudan, and Somalia**. Severe food insecurity persists in Northern Regions of Ethiopia (Tigray, Afar, and Amhara) despite recent ceasefire and limited humanitarian flows. In Sudan, South Sudan, and Somalia, politically instigated sub-national conflict over resources as well as inter-communal violence continue, causing population displacement, disrupting livelihoods, markets, and constraining humanitarian access.
- Different countries in the region continue to face **macro-economic challenges that negatively impact food security**, Sudan is the most affected followed by Ethiopia and South Sudan. COVID-19, which set off the worst global recession in over a century, aggravated the pre-existing economic vulnerabilities, which have now been worsened by the global fallout of Ukraine's war. The risk of **skyrocketing domestic food inflation** remains high in six out of the ten Eastern Africa countries, four of which are already experiencing double-digit food inflation (13 percent in Somalia, 16 percent in Burundi, 42 percent in Ethiopia and 258 percent in Sudan). **Sudan, Eritrea, and Djibouti are the highest at risk** of increased and higher inflation because of the **Ukraine's war**.

Food Security Overview

Hunger in the Eastern Africa Region is on the rise, with an estimated 81.6 M food insecure people in April 2022. This represents a 39.4 percent increase from 58.6 M recorded in November 2021. **Ethiopia** (20.4 M people), **Sudan** (9.8 M people) and **South Sudan** (7.74 M people) recorded the largest number of people affected by acute hunger.

Climate shocks, conflict, insecurity coupled with a deteriorating economy continue to exacerbate humanitarian needs in **Ethiopia**, which has the largest share of food insecure population in the Eastern Africa region (38 percent). After about 16 months of active conflict, food insecurity rates in Northern Ethiopia have exacerbated following disruptions in livelihoods and market activities, displacement, irregular flow of humanitarian assistance, destruction of critical public sector infrastructure and

investments. In Tigray alone, 83 percent of the population (4.6 M people) are food insecure, of which 37 percent (2 M) are severely food insecure¹. This represents a sharp increase compared with pre-crisis period (October 2020), when 0.4 million people were suffering from food insecurity².

The Somali, southern Oromia, SNNPR and southwest regions have experienced prolonged drought conditions since late 2020, significantly impacting on the food security and livelihoods of over 5.5 million people³. Over 175,000 people have been newly displaced in Somali and Oromia in search of water and pasture. In the same areas, the severe feed and water shortage has led to deaths of over 1.5 million herds of livestock, eroding the livelihood asset base of affected households⁴.

Table 1: Prevalence and number of food insecure in the RBN Region as of April 2022

Country	Population (2022)	Food Insecure Population as of April 2022				Severity	
		IPC Classification				Food insecure as a proportion of national population	Proportion of food insecure over total regional RURAL food insecure population
		IPC 3 (Crisis)	IPC 4 (Emergency)	IPC 5 (Catastrophe)	IPC 3+ (Crisis or worse)		
Burundi	12,045,241	1,059,233	243,000		1,302,233	11%	2%
Djibouti	1,117,143	167,210	26,987		194,197	17%	0%
Eritrea							
Ethiopia*	114,964,000				20,389,225	18%	38%
Kenya	54,986,000	2,728,313	757,796		3,486,109	6%	6%
Rwanda	12,254,971	2,533,827	242,600		2,776,428	23%	5%
Somalia	15,737,178	4,220,310	1,740,170	81,100	6,041,580	38%	11%
South Sudan	12,348,961	4,765,000	2,892,000	87,000	7,744,000	63%	14%
Sudan	43,850,000	7,072,838	2,696,783		9,769,621	22%	18%
Uganda	42,885,900	2,539,397			2,539,397	6%	5%
RBN Total Rural		25,086,128	8,599,336		54,242,790		
RBN Total Urban					15,700,000		
Total (Rural + Urban)					69,942,790		
IDPs**					7,030,000		
Refugees					4,622,943		
Total (Rural + Urban + Refugees + IDPs)	310,189,394				81,595,733	26%	

*The figure is undergoing ratification with the Ethiopia FSC and includes IDPs in the country.

**IDPs in Somalia and Ethiopia are excluded as they are accounted for in the country-level figure.

Source: WFP COs

¹ Emergency Food Security Assessment – Tigray Region, Ethiopia, January 2022

² Accessible areas

³ FSNWG

⁴ OCHA, March 2022

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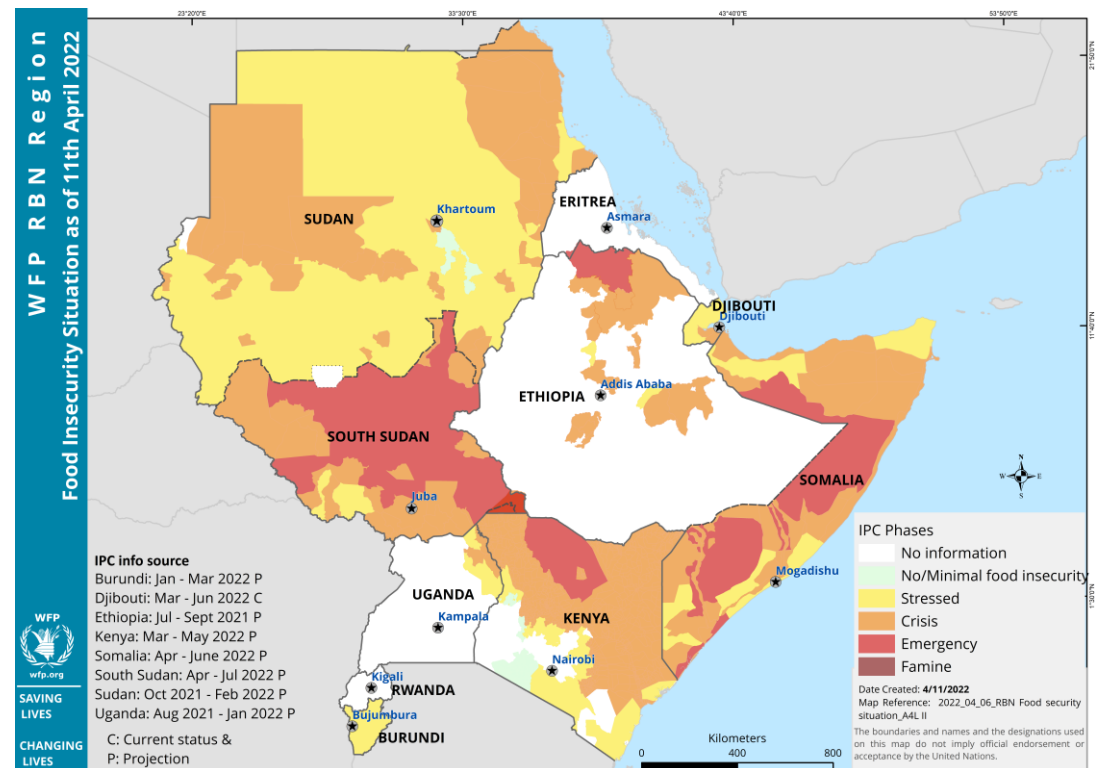
The number of people suffering from acute food insecurity reached 9.8 million in **Sudan**, of which 2.7 million people in Emergency phase (IPC Phase 4). Worsening socio-economic crisis – aggravated by the fallout of COVID-19, floods, conflict-induced displacement, political unrest, and the poor harvest for the 2021/2022 season are the factors behind record high. The already anticipated poor agricultural season is expected to further deteriorate food security, nutrition and livelihood opportunities of the most vulnerable segment of the agropastoral population due to human and livestock movement in search for water and pastures, competition for scarce resources, low crop production and animal disease outbreaks and deaths.

Community-based violence, persistent floods, coupled with fallout of COVID-19 exacerbated pre-existing vulnerabilities in **South Sudan**, pushing nearly 63 percent of the population into acute food insecurity – accounting for 7.74 M people. Unlike other countries in the region, access to fields for production and grazing has been affected by floods in the last three years, resulting in damaged planted crops, below-average production and high food insecurity rates. Wetter-than-normal conditions and associated diseases have led to livestock deaths, affecting livelihoods and consumption patterns of pastoralists in flood-affected populations.

Close to 40 percent of the population in **Somalia** are food insecure, totalling to 6.04 M people. Urban and IDP populations as well as poor households across riverine, pastoral and agropastoral areas in Northeast, Central and Southern regions are facing the highest consumption gaps due to the impacts of consecutive erratic and poor rain seasons, high and rising food prices and continued insecurity. As below-average rains are anticipated for the 2022 *Gu* season (April- June), other risk factors are expected to affect the capability to meet essential needs further, including the rising cost of living, declining availability of milk for both consumption and sale, and income losses related to reduction in agricultural labour demand.

Following drought and drought-induced shocks, the number of food insecure people in **Kenya** reached 3.5 M. Poor crop performance affected marginal agricultural areas while livestock deaths, reduced livestock prices and low milk production has mainly affected livelihoods in pastoral areas. In addition, drought worsened resource-based conflicts, mainly along the Kenya's borders with Ethiopia, Somalia and Uganda. Drought-induced reduction in local farm produce resulted in higher food prices, which are expected to persist through the season. Poor livestock body conditions led to sharp decrease in livestock prices and household purchasing power, posing an additional strain on pastoralists.

Map 2: Food Insecurity Situation according to the IPC, April 2022



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Following a normal Season A maize harvest, households in **Rwanda** are benefitting from high food availability; however food prices (especially vegetables) remain higher than pre-pandemic levels, following excessive rainfall that has flooded vegetable-producing marshlands. Rwanda's refugee and asylee population remain of concern due to their lack of productive assets and social support, compounded by the limited income sources during COVID-19 restrictions.

The number of hungry people in **Uganda** reached 2.54 M, due to the compounding effect of two consecutive below-average crop production seasons in bimodal areas and below-average 2021 crop production, insecurity, below-normal household income, and declining terms of trade in Karamoja. In **Burundi**, the 2022 A season harvest is expected to be near average, improving food availability and access for most households whose main food source is own production. However, below-average A Season crop production and below-average income from a loss of cross-border informal trade and income due to border closures related to COVID-19 control measures have increased the number of people facing acute food insecurity, mainly in Eastern and Northern Lowlands livelihood zones. Map 1 provides the updated food insecurity situation in April 2022.

Nutrition Overview⁵

Overall, the nutrition situation remains worrisome, particularly worsening in the drought affected areas of Ethiopia, Kenya and Somalia where an estimated 7 million children are acutely malnourished including 1.7 million cases of severe acute malnutrition (SAM).

In **Ethiopia**, about 4.5 million children in drought-affected areas need support in treating moderate acute malnutrition (MAM). During a nutritional screening conducted in the Somali Region in December 2021, 22 percent of children and 33 percent of pregnant and lactating women and girls (PLWG) were found to be wasted. The SAM admission trends in 2021 have been consistently higher than past years (Oromia 13.2 percent, Somali 15.5 percent, SNNP and Sidama 30 percent). An estimated 75 percent of all SAM admissions in 2021 were from the four drought-affected regions in the South of the country.

In **Kenya**, acute malnutrition needs in children have risen by 16 percent from 653,000 to 755,000 since 2021 analysis, while acute malnutrition in pregnant and lactating women increased by 7 percent. Eight counties that are categorised to be in a Critical situation (IPC AMN Phase 4) are: Garissa, Wajir, Mandera, Samburu, Turkana, Isiolo, Marsabit (exception of North Horr & Laisamis sub-counties) and Baringo County.

In **Somalia**, the median global acute malnutrition (GAM) among children aged 6-59 months remains a high public health concern at 13 percent (Serious). GAM has increased by 12 percent across Somalia with 1.4 million children are likely to be acutely malnourished. Impact of drought is being reflected in increased admissions into programs for the treatment of severe and moderate acute malnutrition (SAM and MAM). From December 2021 to February 2022, MAM admissions increased by 74 percent, moving from 31,000 in December, to 45,000 in January and 54,000 in February. During the first 2 months of 2022, SAM admissions increased by 51 percent compared to 2021.



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⁵ The malnutrition figures sourced from recent IPC Acute Malnutrition Analysis Reports

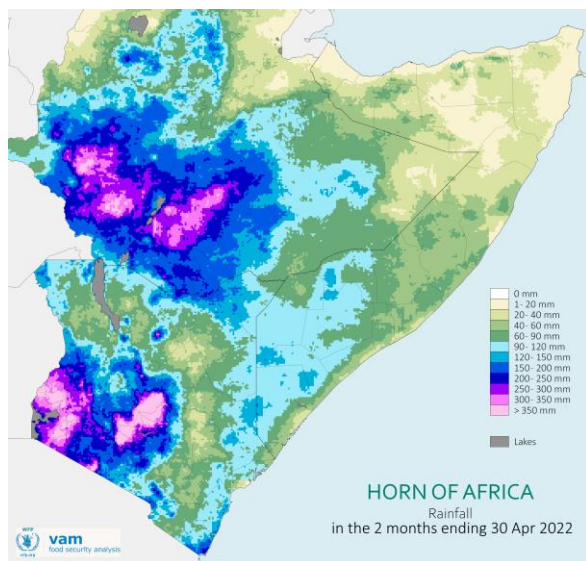
Drivers of Food Insecurity

I. Agro-climatic Shocks (Drought and Floods) with Implications on Crop and Livestock Production and Access to Food⁶

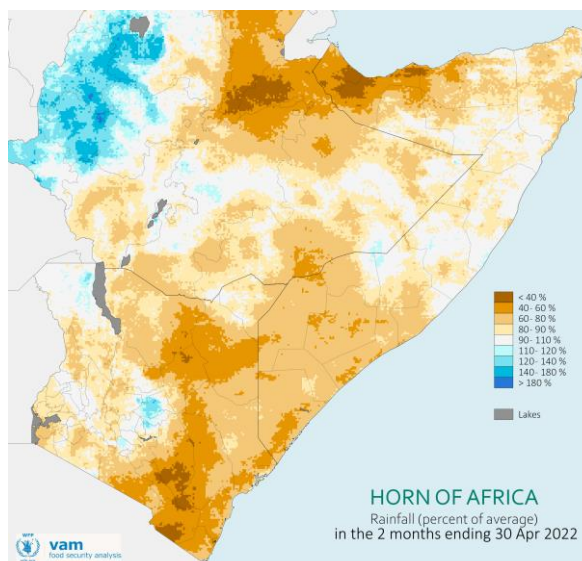
Harvesting of the 2021 secondary season crops has been finalized across the region, with estimates pointing to reduced cereal output for the 2021/22 marketing year. Planting for the 2022 main season is currently ongoing across the region; however, prospects are not favourable due to delayed onset of rains and likelihood of a fourth consecutive poor rainy season.

Drier-than-average conditions and significant rain deficits have been recorded across the Horn of Africa. Until late March, **Kenya, southern Ethiopia and Somalia** received only half or less than half of the typical rainfall amounts for the period. The delayed onset of the season, the likelihood that rains will not compensate for the initial deficits as well as dry long-range climate outlook point to a fourth consecutive below-average season, likely to worsen the food security situation, especially for farmers and pastoralists during the depth of the upcoming lean season.

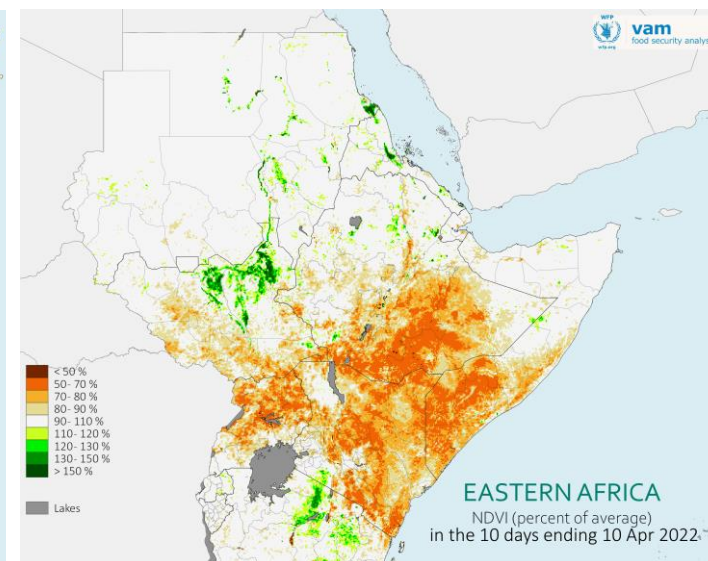
Map 2: Cumulative seasonal rainfall performance ending 30 April



Map 3: Rainfall in the two months ending 30 April as a percent of average



Map 4: Vegetation cover in early April as a percent of average



Purple/blues/greens for above average, browns/oranges for below average

⁶ Cereal production estimates based on [FAO Crop Prospects and Food Situation #1, March 2022](#), unless otherwise specified

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In the drought affected areas of eastern Horn of Africa, the performance over the 2 months of 2022 window have generally been low especially in most pastoral areas. The rainfall amount received have been below 40mm. In comparison to 20-yr average, the amounts are generally below average in most areas. This implies that the situation is still not good for water replenishment or for vegetation growth. Most areas in **Kenya, Somalia** and **southern Ethiopia** show significant vegetation deficits. This is due to insufficient moisture for crop growth and vegetation development. Most water points are near-dry to seasonally dry in northeast **Kenya**, southern **Ethiopia**, and **Somalia**.

Below-average rainfall and erratic temporal distribution throughout the October–December 2021 short rains season over northern and eastern **Kenya** led to a third consecutive season of below-average cereal production, with the short-rains harvest estimated to be approximately 50 percent below the five-year average. Even if it would have performed optimally, the situation could have only marginally improved during the March–May long rains season as this season accounts for only 30 percent of annual crop production. Rangeland resources have also been affected by the cumulative impact of dry weather since October 2020. The positive impact of showers received in early December did not result into long-lasting improvements in rangeland and livestock conditions; equally, the current drought has further contributed to significant deterioration of livestock body conditions (causing abortions and very low birth rates, and widespread animal deaths), while also hampering livelihoods and households' access to milk. So far, it is estimated that about 3 million livestock died in Kenya⁷ and Ethiopia⁸ because of starvation and lack of water while in Somalia there are reports of increased⁹ livestock deaths.

Following severe rainfall deficits and reduced water availability for irrigation along the Juba and Shabelle rivers, **Somalia** recorded the fourth consecutive season with reduced cereal output, with 2021 total cereal production estimated at 109 million tonnes (that is 36 percent below 2020 level and 40 percent below the five-year average). Dryness recorded between January–March 2022 worsened drought situation, with households already facing water shortages, limited access to milk, and reduced availability of saleable animals (due to poor body conditions and deaths). Pastoral household are the most severely affected by consecutive droughts as they spend more on increased costs of water and fodder for livestock and are often forced to migrate in search of pasture and water. In addition, poor rains and failed cereal harvests have already affected households relying agricultural casual labour opportunities. Domestic cereal deficits led to significant increase in prices of locally produced cereals which together with spikes in global food prices led to higher food inflation to the detriment of most poor rural, urban, and displaced families relying heavily on market food purchase. As of February 2022, an average sized goat in Galkayo market could only fetch 132 Kgs of red sorghum compared to the 225 kgs during the same time last year, a reduction of 93 kgs of cereal (that is 41 percent decrease in purchasing power in one year).

In **Ethiopia**, the 2021 output in most *Belg* cropping areas was below-average because of very poor seasonal rainfall performance and conflict. As rainfall deficits are not likely to be compensated, *Belg* production for this year is likely to be below average, reducing further domestic availability of grains. The delayed onset of the February–May rains has already led to water and pasture shortages, which, in turn, have already caused the deaths of at least one and half million livestock and displaced more than 40,000 households and their cattle in search for water and pasture¹⁰. Milk production and access to milk is expected to be significantly below average. Higher than average staple food prices – particularly during the March–May lean season – and low income from livestock sales are likely to result in low purchasing power, especially

⁷ 2022 Short Rains Assessment (SRA), Kenya

⁸ [Ethiopia Drought Update April 2022](#)

⁹ [Somalia Humanitarian Bulletin, Feb 2022](#)

¹⁰ [WFP Ethiopia Drought Response Situation Report #2, January-April 2022](#)

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among pastoralists. Already as of February 2022, an average sized goat in Somali region¹¹ could only fetch 57.6 Kgs of wheat flour compared to the 95.5 kgs at the same time last year (meaning a reduction of purchasing power by 40 percent in one year). Over the same period, terms of trade (ToT) between maize and goat decreased even further (down 58 percent) as an averaged size goat could only fetch 86.8 Kgs of wheat flour from 207 Kgs in February 2021. Despite increased casual labour wage¹² in Somali region compared to the same month last year (up 16 percent, from ETB 250/day in February 2021 to ETB 290/day), purchasing power of casual labourers has been eroded by higher cereals prices. Average ToT between wheat flour and wage labour decreased by 15 percent y-o-y, reaching 6.7 kgs of wheat flour/daily wage rate compared to 8 kgs of wheat flour/daily wage rate in February 2021. With respect to maize, the purchasing power has eroded even more as ToT between maize and casual labour decreased by 41 percent in the same reference period – in other words, the average daily wage of a casual labourer in Somali region could only buy 10.2 kgs of maize in February 2022 compared to 17.2 kgs the same time in 2021.

Following unfavourable weather conditions, outbreaks of pests and diseases, shortages of inputs and increased costs of production due to high inflation rates, the 2020/21 cereal production in **Sudan** is estimated at 5.1 million tonnes which is 35 percent below 2020 output and 30 percent below the five-year average. Production of wheat, for the March 2022 harvest in is forecast at about 600,000 tonnes – that is 13 percent lower than both last year's output and the past five-year average – while sorghum production is estimated at about 3.5 million tonnes – 32 percent lower than 2019/20 and 28 percent less than that of the past five-year average. Considering the cereal deficit, import requirements for the 2022 marketing year are forecast at approximately 2.5 M tonnes.

The 2021 cereal production in **South Sudan** stood at 839 metric tonnes (MT), which is 4 percent lower than 2020 following widespread floods that severely affected half of the country; below average rains in several cropping areas; and disruption of farming activities in conflict-affected areas. Current crop output was well below pre-conflict level as the country is still facing a cereal deficit of 541 MT¹³ that must be met through maize and sorghum imports mostly from Uganda and to a small extent, sorghum from Sudan.

The 2021 secondary season across northern, central and eastern **Uganda** was characterized by below-average rainfall and erratic in temporal distribution, leading to shortfalls in crop production. From the beginning of the secondary season to date, rainfall has been below average in key producing areas, leading to delays in planting, soil moisture stress and poor germination. Despite the seasonal rainfall forecast pointing to above-average rains, the recorded deficits are likely not to be fully compensated in the coming months. Moreover, localized heavy rains might increase risks of flash floods in the flood-prone areas in northern Uganda, southwest sub-regions, and parts of Karamoja¹⁴. The combination of these factors is likely to lead to below-average cereal output of the second season harvest, posing concerns not only for Uganda, but also for other countries in the region that have structural cereal deficit and rely on imports from Uganda (South Sudan, Sudan, Rwanda and Burundi).

¹¹ Average local prices for maize, wheat flour and unskilled daily labour from Charati and Filtu markets in Somali region (also available at [WFP Dataviz, Economic Explorer](#)).

¹² Non-skilled labour wage represents construction, off-loading and agricultural labour

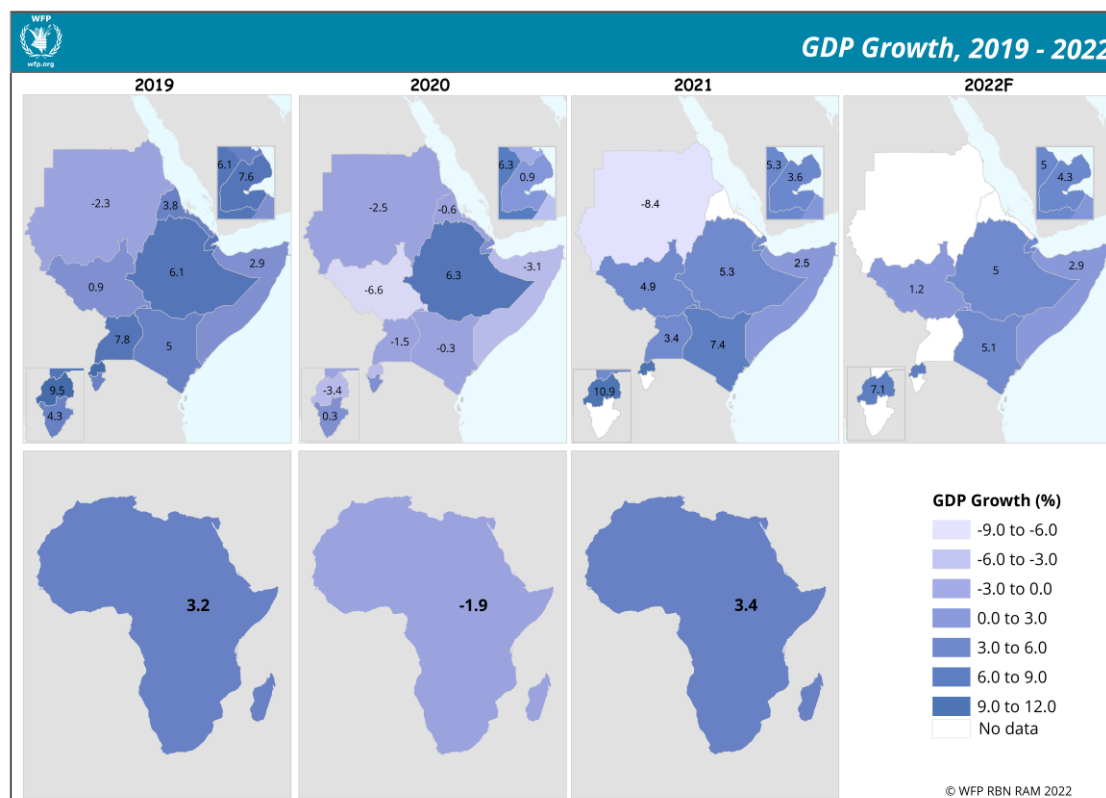
¹³ [IPC South Sudan: Acute Food Insecurity Analysis February 2022 – July 2022](#)

¹⁴ [FEWSNET Uganda Key Message, March 2022](#)

II. Macro-Economic Shocks including the impacts of the Ukraine Crisis

Different countries in the region continue to face varied macro-economic challenges that have negatively impacted on household food security, **Sudan** the most affected followed by **Ethiopia** and **South Sudan**. COVID-19, which set off the worst global recession in over a century, aggravated the pre-existing vulnerabilities but has now been worsened by the global fallout of the Ukraine crisis. Coming from a period of impressive GDP growth in 2019, having registered positive GDP in all countries except Sudan, the Eastern Africa Economies' 2020 real GDP expanded by only 0.4 percent. The countries were able to bounce back from the COVID-19 setbacks, recording impressive economic growth in 2021. The strongest recovery in GDP growth was recorded in **Kenya** at 7.4 percent, while all others were higher than 2.5 percent except for **Sudan**. Although GDP performance is expected to be positive in 2022, it will be slightly reduced compared to 2021 mostly in **Kenya**, **South Sudan** and **Rwanda** (map 4).

Map 4: GDP Trends



The post-COVID-19 fragile economic performance was accompanied by higher inflation rates, depreciated domestic currencies and reduced consumer purchasing power.

Domestic currencies lost value against the dollar through April 2022 compared to the previous year. **Sudan** recorded the highest depreciation (down 39 percent), followed by **Ethiopia** (down 9.7 percent), and **Kenya** (down 6.2 percent). In other countries domestic currencies remained relatively stable, with the exception of the South Sudanese that appreciated. The strengthening of the South Sudanese Pound against the USD was supported by IMF Rapid Credit Facility and increased earnings from the higher global crude oil prices. In **South Sudan** and **Burundi** where black market forex trading is outlawed, shortage of foreign currencies persists, increasing transaction costs to do business and making it difficult for ordinary traders to import food.

Annual Inflation increased in 2021 when compared to pre-COVID-19 period, driven by high food prices. The highest annual inflation was in **Sudan** (263 percent), **Ethiopia** (27 percent) and South Sudan (12 percent) and **Rwanda** (11 percent); in **Burundi** (7 percent), **Kenya** (6 percent) and **Somalia** (5 percent) where rates were near

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or surpassed the 5 percent mark. **Sudan** has the highest inflation rate not just in Eastern Africa but the whole of Africa. Food inflation¹⁵ increased at even a higher rate, rising since November 2021 through March 2022. Food inflation in February 2022 hit the second highest record level in a decade in most countries. Together with job losses and reduced income setbacks occasioned by COVID-19 pandemic, the household purchasing power fell, hitting hard the extremely urban poor who rely on the informal jobs while at the same time depend on markets for food which form a large share of household expenses. In 2021, the joblessness in the region were highest in **Rwanda** (24 percent), **Ethiopia** (19 percent), **Sudan** (18 percent), **South Sudan** (13 percent) and **Djibouti** (12 percent). Table 1 provides a summary of key macro-economic indicators, map 5 presents the food inflation levels while table two shows the recent food inflation trends.

Table 2: Economic heat map¹⁶

Country	Currency fluctuation/ change against the US \$			Annual Headline Inflation			Current Account (% GDP)	Jobless rate	Gov. Budget/ fiscal balance	Debt to GDP ratio
	LCU/USD (March 2022)	M-o-M (March 2022)	Y-o-Y (2022 vs. 2021)	2019	2020	2021	2021	2021	2021	2021
Burundi	1945.0	-0.2%	-2.9%	-2.8%	7.3%	7.3%	-13.6%	0.8%	-9%	15.9%
Djibouti	177.5	0.0%	0.0%	3.3%	1.0%	1.6%	3.7%	11.6%	-4%	42.2%
Eritrea	92.9	0.0%	0.1%	3.8%	4.7%	2.6%	-14.8%	7.4%	-5%	64.0%
Ethiopia	41.3	0.0%	-9.7%	15.8%	20.3%	26.8%	-3.9%	19.1%	-4%	59.0%
Kenya	115.0	-0.6%	-6.2%	5.2%	5.4%	6.1%	-5.3%	6.6%	-8%	68.4%
Rwanda	1017.1	-0.4%	-1.7%	3.3%	9.9%	-0.4%	-13.3%	23.8%	-8%	61.0%
Somalia	575.0	6.3%	2.2%	3.5%	5.5%	4.7%	-17.2%			
South Sudan	430.5	-1.0%	133.9%	24.5%	31.1%	12.0%	-11.3%	12.7%		
Sudan	380.0	-18.8%	-39.3%	61.1%	281.4%	263.2%	-12.3%	17.7%	-12%	259.4%
Uganda	3655.0	1.0%	1.9%	2.1%	2.8%	2.2%	-9.3%	2.4%	-7%	49.8%

The domestic food price inflation¹⁷ as of February 2022 remained high (above 5 percent) in six out of the ten Eastern African countries, which is equivalent to 60 percent of the countries, four of which experiencing double-digit food inflation (13 percent in **Somalia**, 16 percent in **Burundi**, 42 percent in **Ethiopia** and 258 percent in **Sudan**). Food price inflation data have not been updated for most countries but the available ones (2.6 percent in **Rwanda**, 12 percent in **Somalia**, 43.4 percent in **Ethiopia**) are indicative of rising food costs in the region in the first quarter of 2022 and expected to increase further through June 2022 (the lean season). **Sudan**, **Ethiopia**, **Burundi**, and **Somalia** are likely to be the most severely affected by high cost of food.

¹⁵ Domestic price inflation (measured as year-on-year change in the food component of a country's Consumer Price Index (CPI))

¹⁶ LCU- Local currency Unit against the dollar

¹⁷ Measured as year-on-year change in the food component of a country's Consumer Price Index (CPI)

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Map 5: Food Inflation, April 2022

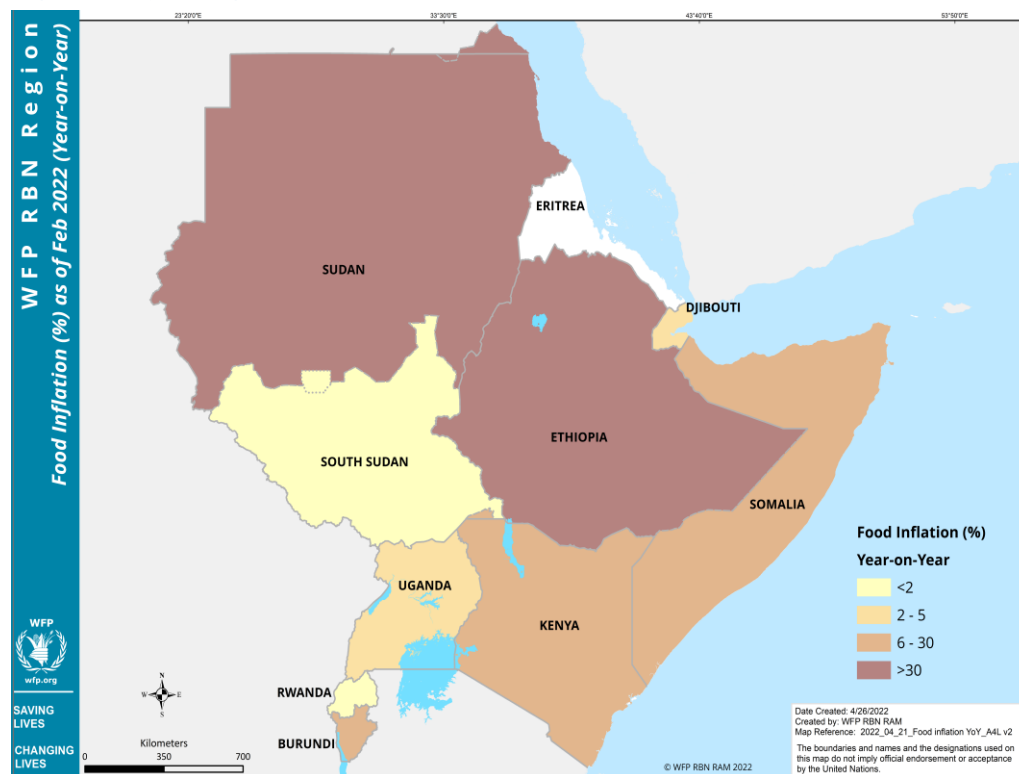
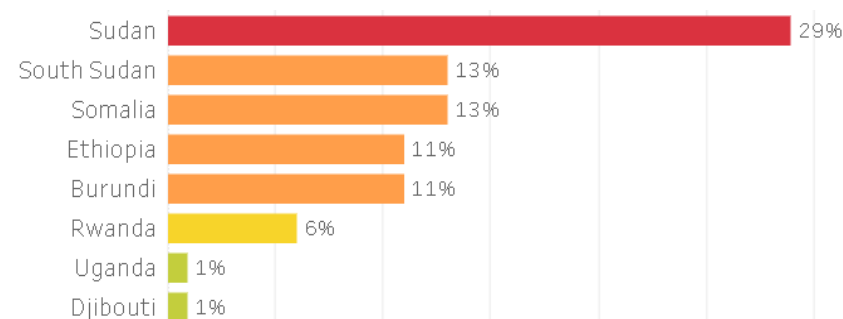


Table 3: food inflation trends

country	2021		2022	
	Nov	Dec	Jan	Feb
Burundi	8%	10%	14%	16%
Djibouti	4%	4%	3%	4%
Ethiopia	39%	42%	40%	42%
Kenya	10%	9%	9%	9%
Rwanda	-3%	0%	5%	1%
Somalia	7%	7%	12%	13%
South Sudan	2%	4%	-15%	-19%
Sudan	340%	318%	260%	258%
Uganda	5%	6%	5%	5%

Fig. 2: Variation in the cost of the food basket (2022 Q1 vs. 2021 Q1)



The cost of basic food basket¹⁸ increased in all countries over the last three months; showing severe increase in **Sudan** (29 percent), high increase in **South Sudan** (13 percent), **Somalia** (13 percent), **Ethiopia** (11 percent) and **Burundi** (11 percent) and moderately increased in **Rwanda** but low in **Uganda** and **Djibouti** (Fig. 5), which reflects increased food inflation of the most basic and highly consumed staples. **Sudan** has the highest increase in food basket globally over the last three months; while the top four countries with the most expensive food basket (**Sudan**, **South Sudan**, **Somalia**, and **Ethiopia**) are among the top countries with highest food crisis in the world.

¹⁸ The change of the cost of basic food basket is calculated by comparing the seasonally adjusted cost of the food basket with the cost in the reference period (previous quarter), as percentage changes. The change is considered 'normal' when the percentage change is between 0 and 3 percent, 'moderate' when it is between 3 and 10 percent, 'high' between 10 and 25 percent, and 'severe' above 25 percent (<https://dataviz.vam.wfp.org/version2/reports/global-coverage-global-market-monitor-apr-2022>)

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Narrowing down on staples most widely consumed by majority of poor and vulnerable people in the region, the March 2022 prices increased to their record levels in the last two years, having surpassed their levels compared to a year ago and in 2020 COVID-19 period in most of the countries.

Current y-o-y staple cereal price increase were highest in **Sudan** (136 percent), **Uganda** (89 percent), **Ethiopia** (92 percent), **Somalia** (54-60 percent) as reflected in table 3. When compared to the five-year average, the current prices remained significantly higher, most prominently in **Ethiopia, South Sudan, Sudan and Somalia** (map 6).

Price levels in **Somalia** (where a risk of famine in the next two months remains high should the rains fail and humanitarian assistance fail to reach those most in need) are nearing the 2011 famine levels.

Staple cereal prices have been consistently high in **Sudan, South Sudan, and Ethiopia** in the, last three years or more while in **Somalia**, the 2022 prices were the highest in recent years. Prices have also increased in **Kenya, Djibouti and Uganda** compared to the previous month (Map 6).

Map 6: cereal price changes from the five-year average

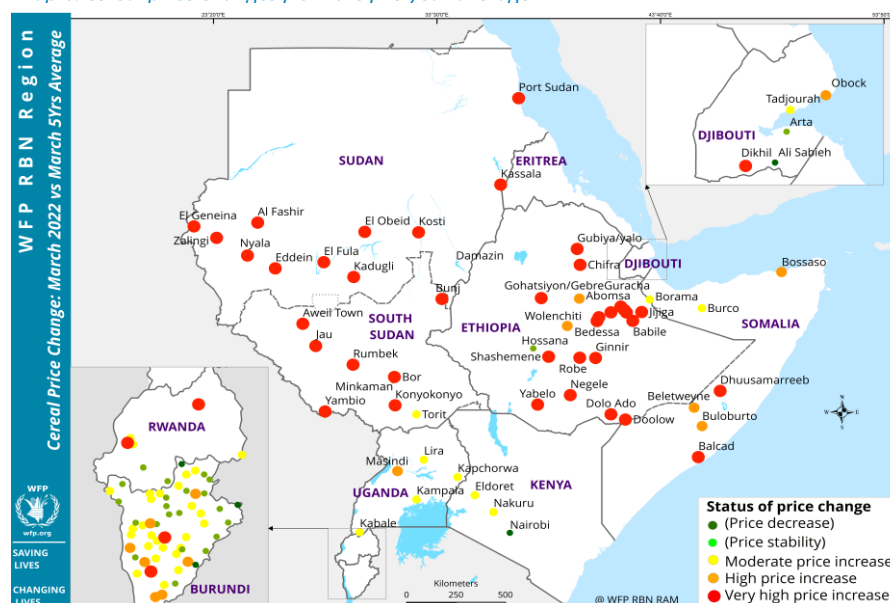


Table 4: change in staple cereal prices

Country	Market	Commodity	Unit	March 2022 price (LCU)	Y-o-Y variation (2020/2019)	Y-o-Y variation (2021/2020)	Y-o-Y variation (2022/2021)
Burundi	National	Maize (White)	kg	880	20%	8%	16%
Djibouti	National	Wheat	kg	140	-2%	-3%	27%
Ethiopia	Addis Ababa	Maize	100kg	2,387	38%	28%	92%
Kenya	Nairobi	Maize	tonnes	42,000	20%	14%	17%
Rwanda	National	Maize	kg	294	13%	-9%	21%
Somalia	Mogadishu	Sorghum (red)	kg	13,800	-7%	0%	60%
Somalia	Mogadishu	Maize (White)	kg	15,300	22%	7%	54%
Somalia	Mogadishu	Rice (imported)	kg	13,000	-2%	-4%	13%
Somalia	National	Wheat	kg	19,167	3%	8%	24%
South Sudan	Konyokonyo (Juba)	Sorghum (white imported)	3.5 kg	1,437	87%	75%	37%
Sudan	Khartoum	Millet	90 kg	30,667	139%	176%	136%
Uganda	Owino	Maize	kg	1,040	20%	-42%	89%

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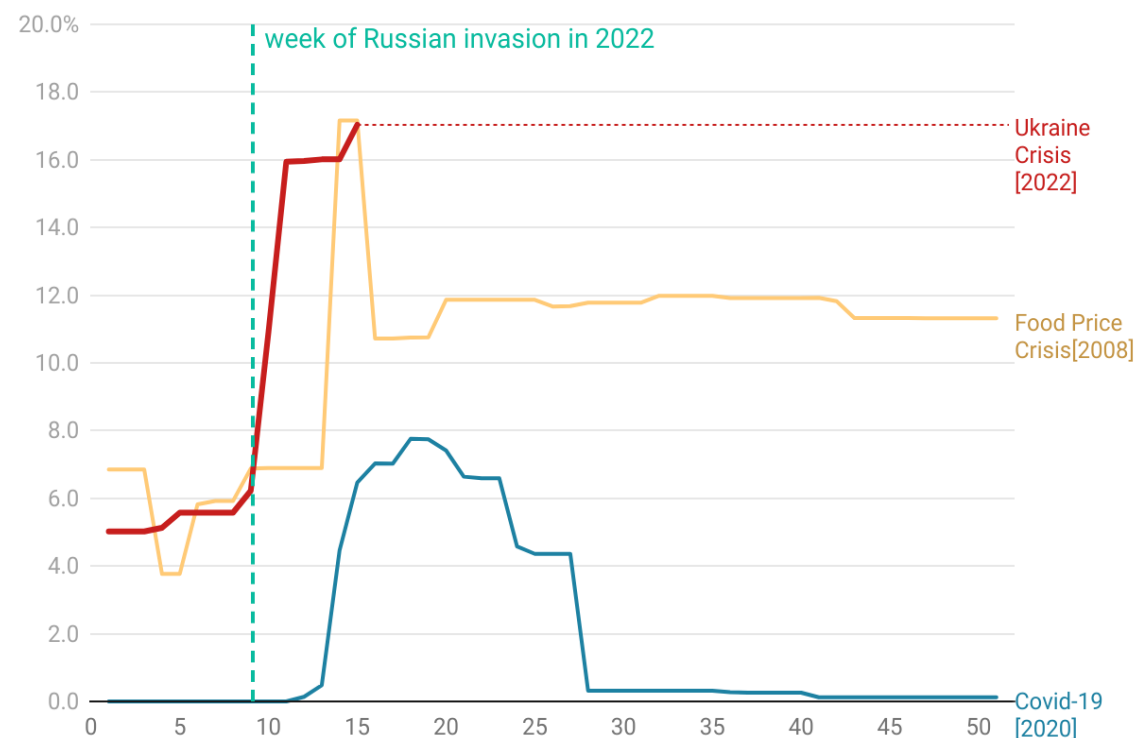
The **Ukraine’s war** has the potential to negatively affect regional food security in the short-term through reduced food supplies, accessibility and high prices of food, fuel and fertilizer given the region’s high dependence on food and fertilizer imports¹⁹.

Export restrictions (on grains, vegetable oil and fertilizers) have surged since the start of the Ukraine-Russia war, the scale having reached the levels of the 2008 global food crisis in terms of share of global trade (in calorie equivalents, Fig.3). Ukraine and Russia have restricted exports of wheat and other food products equivalent to 42 percent of total calories in restricted products. Indonesia has banned palm oil exports while Turkey, Kyrgyzstan and Kazakhstan have imposed export bans on a variety of grain products.

Map 7 shows the impact of the recent export restrictions in Eastern Africa, expressed as a percentage of each country’s imported calories that are affected by export restrictions compared to the situation during the 2008 global food crisis period.

Nearly half of **Uganda** (43 percent), **Eritrea** (43 percent) and **Sudan’s** (47 percent) imported food calories have been affected by export restrictions, largely due to Russia Federation and Ukraine wheat export bans. The share of global restricted exports to **Kenya** stands at 20 percent while relatively lower in **Somalia** (20 percent) and **South Sudan** (9 percent). Incidentally, cereals imported to **South Sudan** are largely from the Eastern Africa Region – mainly Uganda, Kenya and Tanzania (for maize and sorghum and Ethiopia – wheat).

Fig. 3: Evolution of the share of global trade, in calories, impacted by export restrictions



X-axis shows the week of the year. 1= first week of the year. Data extracted from the Export restriction tracker on April 12th 2022.

Chart: David Laborde • Source: IFPRI

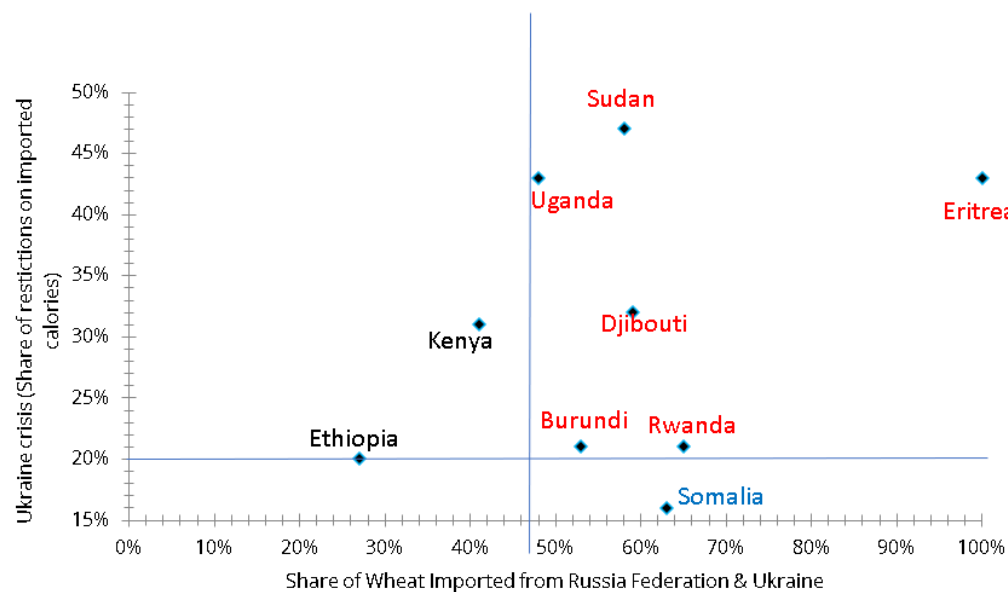
¹⁹ WFP’s Implications of Ukraine Conflict on Food Access and Availability Update #2: <https://docs.wfp.org/api/documents/WFP-0000138223/download/>

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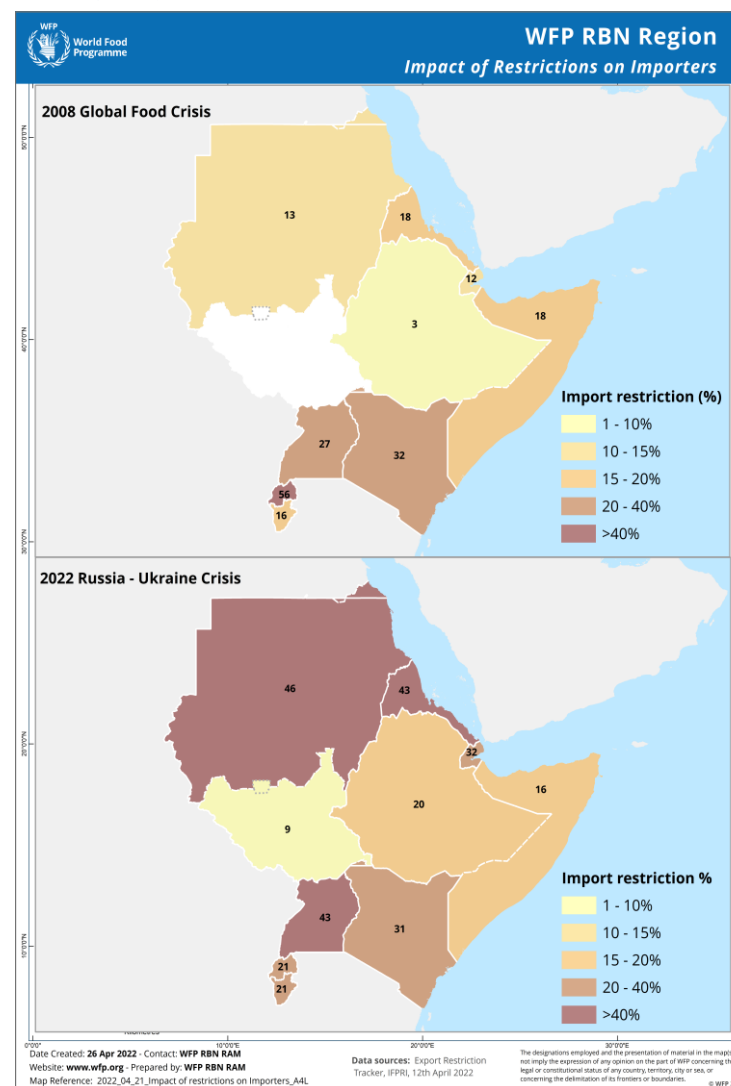
Compared to the 2008 global food price crisis, the impacts of export restrictions are more severe in **Sudan** (33 percent increase on restricted exports), **Eritrea** (from 12 percent export restrictions to 43 percent), **Uganda** (from 27 percent to 43 percent export restrictions) and **Djibouti** (from 12 percent to 32 percent).

Figure 4 shows the share of imports affected by export restrictions as a share of total agricultural imports of each country compared with the share of wheat imports from Russia and Ukraine. Import-dependent countries that import a large share of wheat from Russia Federation and Ukraine show a relatively high share of restricted calories in their import mix. These mainly include **Sudan**, **Eritrea**, **Uganda**, and **Djibouti**. Other than Uganda, which is near maize surplus producing country with higher cereal substitution capacity, the rest are net food importers that have low or no domestic capacity to produce wheat or alternative cereals. Moreover, **Sudan** is facing mounting macro-economic challenges leaving little to no space to cope. Noting that many of the export restrictions are in the form of export deterrent higher taxes and or other transaction costs that are passed through to final consumers. This means that in Eastern Africa, **Sudan**, **Eritrea**, and **Djibouti** are the

Fig. 4: share of global trade, in calories, impacted by export restrictions vs. share of imports from Russia and Ukraine



Map 7: share of global trade, in calories, impacted by export restrictions (2008 global food crisis vs. the Ukraine Crisis)



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highest at risk of increased and higher inflation because of the Ukraine crisis. There is a risk of escalation of food export bans by other major food producers in the coming months, given tighter global cereal²⁰ markets this year.

WFP estimates that the ensuing inflation from the Ukraine Crisis could push additional 7-10 million people into acute hunger in Eastern Africa in 2022. Already, the region witnessed significant short-term jumps in prices of wheat, bread, fuel and fertilizer and widespread shortages of fuel, the most affected being **Kenya, Somalia, Uganda, Ethiopia, South Sudan, and Burundi**.

Current fuel prices jumped by 5 percent to historical high in **Kenya**, while wheat prices increased by a record 59 percent in **Ethiopia**, the highest since 2016, just within two weeks of the Ukraine crisis. Fertilizer prices have doubled in **Kenya** and tripled in **Ethiopia** which together with fuel prices will affect 2022 yields and crop production and worsen food price crisis. Fuel shortages in **Burundi** and **South Sudan** have once more increased sale from black market sources for as high as triple the official pump prices. In Bujumbura, the fuel crisis has been worsened by the recent ban on the operation of public and private bicycles, motorcycles and three-wheel vehicles (Tuk tuks) from the precincts of the city, making it difficult to supply food from farmers in addition to significant disruption of movement, resulting in increased prices of food and transport and loss of income for operators. Consumption of fuel, fertilizer, wheat and vegetable oil have low substitution elasticity to price increases, likely to pile pressure on low foreign exchange reserves and current account balances of **Ethiopia, Sudan South Sudan and Burundi**.

The overlapping food crisis risks in the region comes at a time when most countries are facing increased fiscal imbalances and rising public debt pressure limiting capacity of public-backed subsidies and social protection systems to cover food gaps of the most vulnerable. In **Kenya, Rwanda and Eritrea** for instance, the public debt to GDP ratio is expected to exceed 60 percent, the highest at 68 percent in **Kenya** while the budget deficit is projected to remain at 8 per cent of GDP in both **Kenya and Rwanda** this year. At 12 percent fiscal deficit, abolition of subsidies on basic food items and nearly 260 percent debt to GDP ratio, the public debt pressure is even more worrying, increasing the risk of higher taxation and further inflation and unaffordability of nutritious meals. The increased trend towards scrapping of fuel subsidies in the region will further escalate inflation risks. The planned 2022 elections in **Kenya, Djibouti, Sudan, and Somalia/Somaliland** will add pressure on public spending.

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²⁰ [WFP Market and Trade Update, Eastern Africa](#)

III. Conflict, Insecurity and Displacement

A complex and protracted humanitarian emergency persists in northern **Ethiopia** as ongoing conflict continues to displace millions and disrupt livelihoods and limit access to basic services in including health, water, schools, and markets. According to the latest assessment conducted in Tigray in November 2021, 4.6 million people were food insecure of which 2 million were severely food insecure²¹. Indicative estimates from a more recent assessment conducted in conflict-affected areas in Afar (Fanti, Zone 4) and in Amara suggest 4.5 million people are food insecure²². Although the security situation in northern Ethiopia remains tense, the humanitarian corridor in the Afar Region reopened on March 30th, offering an opportunity for food and other humanitarian supplies to enter Tigray after months of disruption and limited humanitarian access²³.

Rising food prices, reduced income opportunities and erosion of coping capacity have already disrupted livelihoods, further deepening food insecurity in **Somalia** for the most vulnerable groups, including IDPs and urban poor. Persistent insecurity, conflict, and unresolved political tensions – particularly in central and southern Somalia – have increased localized conflict, insecurity, and political uncertainty, which, in turn, led to further population displacement and disruption in markets, reduced livelihood opportunities, while restricting access to humanitarian assistance. According to UNHCR, 36,000 people have been internally displaced in the first quarter of 2022 due to conflict and insecurity²⁴. Amid this political uncertainty, Al-Shaabab’s territorial reach and attacks have surged, especially in Middle Shabelle, Hiraan, and Galguduud.

In recent months, there has been an increase in inter-communal violence and resource-based conflict (over land, livestock, access to water and grazing field between herders and farmers) in **Sudan** (mainly in parts of Darfur and Kordofan states²⁵) which led to population displacement. In addition, influx of Ethiopian refugees northern Ethiopia through the Eastern Sudan borders since November 2020 exerted additional pressure on local community resources. According to the 2022 Sudan HNO, 1.1 M refugees, 2.9 M IDPs and almost 1 M returnees are in need for food and livelihoods support. Based on the 2021 UNHCR Basic Needs and Vulnerability Assessment (BNAVA), 21 percent of the refugee population are unemployed, and 55 percent have an income of less than SDG 20,000 (about USD 45)²⁶.

The displacement situation in **South Sudan** presents protracted and cyclical patterns related to re-current conflicts, floods, and very limited government response capacity, which has been further exacerbated by the pandemic. According to UNCHR, the number of IDPs from the beginning of the conflict in 2013 until January 2022 reached 2 M²⁷. Continued and increased sub-national violence across the country (mainly in Jonglei, Lakes, Unity, Upper Nile, Warrap and Western Equatoria), will continue to hamper trade, lead to depletion or loss of assets, disrupt livelihoods and constrain people’s capability to meet food and other essential needs.

²¹ [WFP Ethiopia – Emergency Food Security Assessment, Tigray, January 2022](#)

²² [WFP Ethiopia – Emergency Food Security Assessment in Conflict-affected Areas in Amhara and Afar Regions, March 2022](#)

²³ [OCHA – Northern Ethiopia Humanitarian Update, 7 April 2022](#)

²⁴ [UNHCR – Somalia Internal Displacement Dashboard](#)

²⁵ [WFP Sudan Country Brief, February 2022](#)

²⁶ [Sudan Humanitarian Needs Overview, 2022](#)

²⁷ [UNHCR South Sudan IDP Population dashboard, January 2022](#)

Food Security and Nutrition Outlook (April-June 2022)

The food insecurity situation is expected to worsen across most countries in Eastern Africa through the lean season while faced with multiple and overlapping shocks. The drought situation worsened through the first decade of April in most pastoral areas in **Kenya, Uganda, Somalia** and **southern Ethiopia** characterised by very little rains and significant vegetation and water deficits. The situation is not expected to improve rapidly due to the high probability of a fourth consecutive failed March-April-May rains forecasted with all global meteorological agencies (NOAA, ECMWF, IRI, UK MET, WMO) showing an increased probability of below-average rains. Even with improved rains, the recovery in the drought affected areas will take time, until which time they will require increased and continuous humanitarian support. The prospects of Tanzania and Uganda facing below average harvest and attendant high maize will affect regional food availability and access particularly in **Kenya, Burundi, Rwanda, and South Sudan**.

Countries of concern

- In **Kenya**, the drought situation continues to worsen in sixteen (16) of the 23 Arid and Semi-Arid (ASAL) counties ([NDMA](#)). The March-May rains have not only been delayed but are projected to perform below normal, extending food access gaps among pastoralists. Livestock body conditions have deteriorated, milk production is [below average and worsening](#); cattle prices remained below normal in most of the drought affected counties, while livestock deaths increased and maize prices remained higher than normal. Goat to cereal terms of trade, a measure of purchasing power, is below average in most of the ASAL counties. Food security is expected to worsen with the situation not expected to improve significantly in the short run in the drought affected areas. An estimated **3.5 M** people were projected to be at risk of acute food insecurity through May 2022 in pastoral and marginal agricultural areas, with Marsabit County expected to remain in emergency.
- In **Somalia**, worsening drought is putting numerous areas across the country at **risk of famine** in the next two months should the current April to June Gu season rains fail, food prices continue to rise sharply, and humanitarian assistance fails to reach the worst affected areas. The back-to-back drought since late 2020, which is likely to be extended during the current GU, has resulted in considerable number of livestock deaths, displacement, poor crop production and rising food prices, the latter having surpassed the 2011 famine levels. An estimated more than 6 million people, representing 38 percent of the population, will face crisis or worse levels of acute food insecurity through June 2022, including 1.7 million people in Emergency and 81,000 people in Catastrophe.
- In **South Sudan**, an estimated 7.74 million people (62.7 percent of the population) will likely face Crisis (IPC Phase 3) or worse acute food insecurity through July 2022, with 2.90 million people and 87,000 people likely to be in emergency and humanitarian catastrophe respectively. Food insecurity in South Sudan is primarily because of chronic vulnerabilities exacerbated by multiple shocks (severe flooding, localized droughts, sub-national and localized violence, the effects of the long standing macro-economic challenges and population displacements).
- In **Sudan**, macro-economic and political instability, localized conflict, 35 percent below normal cereal production, high inflation and sharply depreciated local currency will sustain higher food insecurity through the lean season. Food prices are expected to extend rising trends, affecting household purchasing power.
- In **Ethiopia**, biting drought in Southern regions, conflict and attendant displacement in the Northern regions and macro-economic crisis continue to increase people in need of humanitarian assistance. Ethiopia's inflation remains persistently high, reaching an historical high of 43.4 percent in March 2022 fueling further inflation and public debt default risks in the coming months against the backdrop of low foreign currency reserves, weak national currency, and weak

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balance of payment position. Food prices remain particularly high in Tigray on the backdrop of low commercial supplies and scarcity of food commodities. Uncertainty over the 2022 rains in southern Ethiopia increases the risk of further deterioration in food security.

- In **Uganda**, except for southern areas and regions around Lake Victoria, where rains started on time, there is increased risk of worsening food insecurity, largely in the eastern and northern areas including in Karamoja where precipitation has been significantly below average, planting delayed and below average vegetation and water conditions persist. Karamoja has very low household stocks of staples because of floods/water logging during the last planting season, which was later worsened by dry spells, reducing crop production. On the other hand, there is an elevated risk of mudslides and flash floods exists in the flood-prone areas because of expected localized heavy rains in April ([FEWSNET](#)). Food prices have increased rapidly in recent months, because of low household stocks, rising fuel prices and the effects of the Ukraine conflict.
- In **Djibouti**, severe food insecurity is expected to worsen in both rural and urban areas, affecting an estimated 192,169 people, on account of worsening drought conditions and increased food prices because of the Ukraine crisis.



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The food insecurity situation is however expected to improve in most of Burundi and Rwanda supported by near average seasonal harvests.

- In **Rwanda** and **Burundi**, the 2022 season A harvests were near normal, which will continue to strengthen HH access to food and decrease the number of people facing acute food insecurity. The total number of people in IPC Phase 3 (Crisis) was projected to reduce in Burundi to 1.44 million in the first projection (lean season/ Feb-May 2022) and then to further down to 1.059 million in the second projection (2022A June harvest). Similar reduction is expected in Rwanda and Uganda (around Lake Victoria) where the cumulative rainfall since 10th February 2022 has been favorable for crop production.

Approximately **7 million children under 5 years** are expected to be acutely malnourished in Ethiopia, Kenya and Somalia including **more than 1.7 million with severe acute malnutrition**. There is a high likelihood of the nutrition situation deteriorating in the next three months, exacerbated by the high unaffordability of nutritious diets and drought impacts.

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