EAST AFRICA Food Security Outlook — February to September 2018

Conflict and impacts of drought drive continued high assistance needs in East Africa

KEY MESSAGES

- Conflict and the impacts of drought continue to drive very high assistance needs in East Africa. In South Sudan, Yemen, Ethiopia, and Somalia, large-scale Emergencies persist, and households face significant gaps in meeting their basic food needs, although humanitarian assistance is preventing more extreme outcomes in many areas. Sustained, large-scale humanitarian assistance is needed to protect livelihoods and mitigate the potential for loss of life.

- In a worst-case scenario of a protracted absence of assistance over a large area, Famine (IPC Phase 5) is likely in South Sudan. Areas of greatest concern include southern and central Unity, northwestern Jonglei, and Wau of Western Bahr el Ghazal. In Yemen, Famine (IPC Phase 5) is likely in a worst-case scenario in which the country is unable to import food through Al Hudaydah and Salif ports for an extended period.

- The 2017 *Deyr*/short rains were below average over the Horn of Africa, and the March to May 2018 *Gu* rains are forecast to be below average. Access to typical sources of food and income will remain lower than normal throughout the projection period. Crisis (IPC Phase 3) and Emergency (IPC Phase 4) outcomes are expected in many areas through at least May. Of greatest concern is the Somali Region of Ethiopia, where extreme outcomes are expected to persist through September.

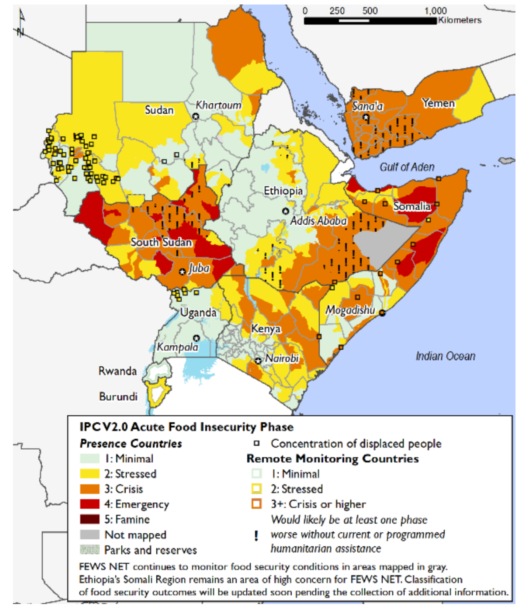
- In Sudan, the recent lifting of wheat subsidies and devaluation of the Sudanese currency has led to significant increases in staple food prices. This, in combination with very poor performance of the main rainy season in Kassala and North Darfur, and continued population displacement within SPLM-N-controlled areas of South Kordofan, is leading to higher than usual humanitarian assistance needs. Between June and September 2018, IDPs in SPLM-N areas of South Kordofan are expected to be in Emergency (IPC Phase 4), while parts of Kassala, North Darfur, and Blue Nile will be in Crisis (IPC Phase 3).

OUTLOOK BY COUNTRY

Ethiopia

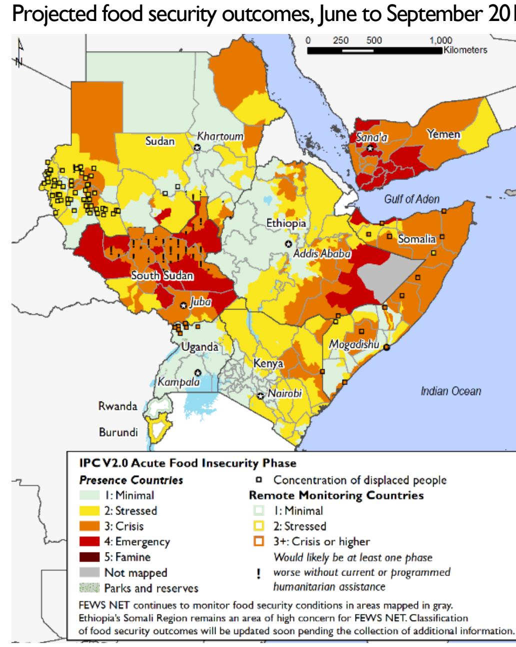
- Ethiopia is expected to continue facing a major food security emergency in 2018 following large-scale livestock losses in 2016 and 2017, coupled with an expected below-average *Gu* season in 2018. Dollo, Korahe, Jarar, Afder, and Shabelle zones of the Somali

Current food security outcomes, February to May 2018



Source: *FEWS NET*

Projected food security outcomes, June to September 2018



Source: *FEWS NET*

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Region are of greatest concern, particularly among IDPs. Large-scale emergency assistance is needed to prevent extreme levels of food insecurity, acute malnutrition, and excess mortality.

- Elsewhere, following a very poor *Belg* season in 2017, assistance needs in SNNPR will remain high until the upcoming Belg harvests in June 2018. After June, food security outcomes in SNNPR are expected to improve from Crisis (IPC Phase 3) to Stressed (IPC Phase 2). However, North American Multi-Model Ensemble (NMME) forecasts suggest *Belg* 2018 rains will be below average in northern Ethiopia, which could affect crop production and lead to assistance needs later in the 2018/19 consumption year.

- In addition, insecurity since mid-2017 has driven displacement in central regions of the country. More than 800,000 people are reportedly displaced, many of whom are facing disrupted livelihoods and difficulty meeting their basic food needs.

Kenya

- Following three poor rainy seasons in many eastern areas, and a potential fourth with the 2018 March to May long rains, food security needs are expected to peak in September 2018. While there will be some temporary improvements, food and income sources are expected to remain below average in many pastoral and marginal agricultural areas. Crisis (IPC Phase 3) outcomes are expected to persist through September in parts of Mandera, Isiolo, Wajir, and Garissa, requiring sustained humanitarian assistance.

- In many pastoral areas due to the extended dryness, rangeland resources have deteriorated severely since January in parts of Kajiado, Isiolo, Tana River, Mandera, and Garissa, negatively impacting livestock body conditions and productivity. As a result, poor households in these areas as well as in parts of Wajir, Samburu, Marsabit, and Turkana are currently experiencing Crisis (IPC Phase 3) outcomes.

- There have been some improvements in the nutrition situation in Kenya, in part due to interventions, and more are expected, even if the long rains are below average. However, typical Critical levels (GAM 15-29.9 percent) of global acute malnutrition are likely to be sustained through the scenario period in several pastoral areas.

- National 2017/18 maize production was 10 percent below the five-year average, which has significantly affected the market supply and resulted in above-average prices. Wholesale maize prices are likely to be lower than 2017 levels but above the five-year averages through September. In the marginal agricultural areas, a below-average short rains' harvest is likely to be followed by another below-average long rains harvest, maintaining most poor households in Stressed (IPC Phase 2).

For more information, see the Kenya Food Security Outlook from February to September 2018.

Somalia

- Large assistance needs will continue throughout 2018, with worst-affected populations in northern and central pastoral areas facing larger gaps in their basic food needs. Although a better than expected October to December 2018 rainy season contributed to a reduction in the risk of Famine (IPC Phase 5), humanitarian assistance also played a large role in driving improvements. There is high concern food security would deteriorate considerably in this absence of assistance, with an estimated 2.7 million people expected to face Crisis (IPC Phase 3) or worse by June 2018. Continued assistance is needed throughout much of the country to protect lives and livelihoods.

- The 2018 *Gu* season is forecast to be below average and, as a result, access to typical sources of food and income, including agricultural labor, crop production, and livestock sales, will remain below average throughout the projection period. Pastoralists in northern and central regions lost many livestock in 2017 and the recovery of herds to pre-crisis levels will require several consecutive, favorable seasons.

- Food security outcomes are expected to be most severe between March and June, when Emergency (IPC Phase 4) outcomes are likely in Guban Pastoral, Addun Pastoral, and the western half of Northern Inland Pastoral livelihood zones. During this time, poor households will lack access to milk and have few saleable livestock to purchase food. Of greatest concern is Guban Pastoral livelihood zone, where atypical livestock deaths are occurring and households face an extreme loss of income. Emergency (IPC Phase 4) outcomes are expected throughout the projection period in this livelihood zone.

For more information, see the Somalia Food Security Outlook from February to September 2018.

South Sudan

- An estimated 5.3 million people, 48 percent of the population, are currently facing Crisis (IPC Phase 3) or worse acute food insecurity, despite the harvest and continued, large-scale assistance. Compared to past IPC analyses, this is the highest proportion of the population to need emergency humanitarian assistance during the post-harvest period, and the first time no area is classified in Minimal (IPC Phase 1).

- In the most likely scenario, which assumes typical seasonal deterioration and the continuation of humanitarian assistance at planned levels, widespread Crisis (IPC Phase 3) and Emergency (IPC Phase 4) outcomes are still expected. Humanitarian assistance is likely to prevent more extreme outcomes in many areas. However, assistance is expected to meet less than 50 percent of the estimated need, and access to other food sources will be extremely low throughout the lean season. Based on this projection and the severity of acute food insecurity during the 2017 lean season, it is likely some households will be in Catastrophe (IPC Phase 5) during the upcoming lean season even in the presence of assistance.

- In a worst-case scenario of a persistent absence of food assistance over a large area, Famine (IPC Phase 5) would be likely because this absence of assistance would remove a primary food source and would likely drive increased levels of conflict over remaining scarce resources. In turn, higher levels of conflict would increase movement restrictions, preventing households from accessing food from other sources. Given current food security outcomes and past conflict trends, areas of greatest concern include central and southern Unity, northwestern Jonglei, and Wau of Western Bahr el Ghazal. However, given the volatile nature of the current Emergency, and that food security can deteriorate rapidly among populations who face extreme movement restrictions, Famine (IPC Phase 5) remains possible in many areas of the country.

- Given the continued risk of Famine (IPC Phase 5) and projections of extreme levels of acute food insecurity throughout 2018, large-scale humanitarian assistance above levels currently planned is needed urgently to save lives. Further, assistance should be complemented with unhindered humanitarian access and action to end the conflict.

For more information, see the South Sudan Food Security Outlook from February to September 2018.

Sudan

- Parts of Kassala and North Darfur, affected by severe dryness in 2017, and IDPs in Jebel Marra, will face Crisis (IPC Phase 3) through September, while food security among IDPs in SPLM-N areas of South Kordofan will deteriorate from Crisis (IPC Phase 3) to Emergency (IPC Phase 4) between June and September 2018. Most other parts of Sudan will likely remain in Minimal (IPC Phase 1) or Stressed (IPC Phase 2) acute food insecurity between February and September 2018, following above-average 2017/18 harvests.

- The recent joint Annual Crop and Food Supply Assessment Mission (CFSAM), released in February 2018, estimated Sudan's national 2017/18 cereal production at approximately 5.2 million metric tons. This is approximately 10 percent higher than the recent five-year average, and nearly 40 percent lower than the well above-average 2016/17 harvests. Very poor seasonal performance in northern Kassala, northern Gadaref, and parts of North Darfur, and North Kordofan led to locally very poor crop production and regeneration of pastoral resources.

- The recent lifting of wheat subsidies and devaluation of the Sudanese currency has led to significant price increases for key food and non-food items. Prices for key staple foods, such as locally produced sorghum and imported wheat, increased on average by 35 percent between December and January. According to the Sudan's Central Bureau of Statistics (CBS), inflation in Sudan increased sharply from 25 percent in December 2017 to 52 percent in January 2018.

For more information, see the Sudan Food Security Outlook from February to September 2018.

Uganda

- Minimal (IPC Phase 1) outcomes are expected across much of Uganda through September 2018 due to expected average harvests, typical access to income-earning opportunities, and near-normal household purchasing capacity. In Karamoja, Stressed (IPC Phase 2) outcomes are expected through the peak of the lean season in June, and some households in Napak, Moroto, and Nakapiripirit will likely be in Crisis (IPC Phase 3). Stressed (IPC Phase 2) outcomes will continue in parts of Karamoja with the harvest, though Minimal (IPC Phase 1) outcomes are expected in Abim, Amudat, and Kotido.

- The March to May first rainy season in bimodal areas and the April to September main rainy season in Karamoja are forecast to be above average. As a result, production is expected to be average to slightly above average. The exception is maize production in Karamoja, where crop losses due to Fall Armyworm (FAW) are likely. However, sorghum production in Karamoja is expected to be average. In bimodal areas, continued control measures against the spread of FAW are likely and maize losses will be relatively lower.

- The daily arrival rate of refugees from South Sudan has declined in recent months. However, an increasing number of refugees are arriving from Democratic Republic of Congo (DRC), and an estimated 52,284 people have sought refuge in Uganda from DRC between December 2017 and February 2018. Refugees are expected to have access to humanitarian assistance through mid-2018 and Stressed (IPC Phase 2!) outcomes are likely. Some refugees will also access harvests in June/July and production is expected to be slightly better than last year, though total production is insufficient to meet households' basic needs. In the absence of assistance, Crisis (IPC Phase 3) outcomes are likely.

For more information, see the Uganda Food Security Outlook from February to September 2018.

Yemen

- Large populations in Yemen continue to face Crisis (IPC Phase 3) or Emergency (IPC Phase 4) acute food insecurity. As worst-affected households begin to exhaust their coping capacity, populations may begin to move into Catastrophe (IPC Phase 5) even in the absence of additional disruptions. In a worst-case scenario, significant declines in commercial imports below requirement levels and conflict that cuts populations off from trade and humanitarian assistance for an extended period could drive food security outcomes in line with Famine (IPC Phase 5).

- Large-scale humanitarian assistance continues to play an important role in reducing the severity of acute food insecurity outcomes in Yemen. In 2017, the humanitarian community reached on average nearly six million beneficiaries, and that number is increasing in 2018. Current funding for emergency food assistance in Yemen is expected to be sufficient to provide assistance at current levels only through May 2018.

- Yemen's main seaports (Al Hudaydah, Salif, Aden, Al Mukalla) remain open and inflows of commercial and humanitarian imports have continued into March. However, import levels are broadly below pre-blockade levels and less than monthly food and fuel import requirements.

For more information, see the Yemen Food Security Outlook from February to September 2018.

Remote Monitoring Countries[1]

Burundi

- Total 2018 Season A production is likely to be above-average, and with prospects for a favorable Season B harvest in June 2018, Stressed (IPC Phase 2) outcomes are expected to persist through September 2018, primarily due to staples prices that remain high. However, poor households, particularly in localized areas that experienced productions deficits in Bubanza Province, are likely to face Crisis (IPC Phase 3) outcomes during the lean season in April.

- As expected given the favorable 2018 Season A rainfall, the prices of staples dropped significantly in the main markets across the country, particularly in January. For example, according to key informants, the price of the common variety of

[1] With remote monitoring, an analyst typically works from a nearby regional office, relying on a network of partners for data. Compared to previous series of countries in which FEWS NET has a local office, reports on remote monitoring countries may offer less detail.

beans was between 700 and 800 BIF per kg in early January in Kirundo, compared to 1100 to 1200 BIF/kg in November 2017. Despite these declines, with limited household incomes, poor households' food access remains constrained.

- In January 2018, IOM and UNHCR estimated there were 176,000 IDPs, 13,000 returnees from Tanzania, and 44,000 refugees and asylum seekers from the DRC. Given the ongoing shortfalls in humanitarian assistance, most returnees from Tanzania and all the Congolese asylum seekers and refugees are experiencing difficulty meeting their minimum food needs. In the absence of assistance, they would face Crisis (IPC Phase 3) outcomes.

For more information, see the Burundi Remote Monitor Report for February 2018.

Rwanda

- Overall, the 2018 Season A harvest is expected to be average, despite some production deficits in the east. With existing income-earning opportunities and a favorable Season B rainfall forecast, Minimal (IPC Phase 1) outcomes are expected to continue countrywide through September 2018. However, some poor households in Kayonza, Kirehe, and Nyagatare districts in Eastern Province may already be in Stressed (IPC Phase 2) due to below-average Season A production.

- According to the National Institute of Statistics of Rwanda, January cereal prices atypically increased by more than five percent compared to December 2017 due to a combination of erratic rainfall and Fall Armyworm damages. However, with the expected steady, domestic supply of non-cereal crops and robust regional trade, staple food prices are likely to be relatively stable through September 2018.

- According to UNHCR, as of January 31, 2018, Rwanda hosted about 174,000 refugees and asylum seekers, more than half Burundians. The monthly arrival rate of Burundian asylum seekers fell in January, putting average monthly arrivals at about 486 since November. WFP funding shortfalls persist, so refugees in camps continue to receive a quarter less in daily rations but can seek daily labor outside of the camps.

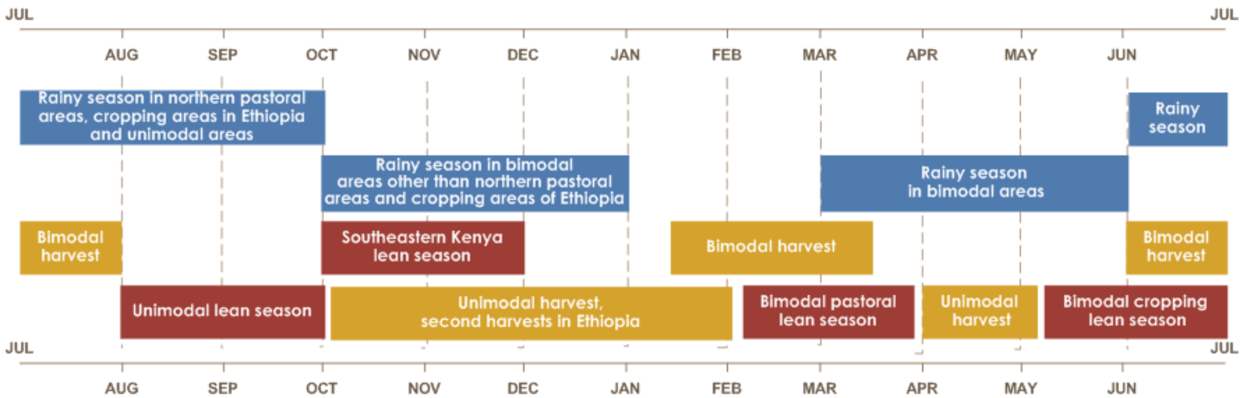
For more information, see the Rwanda Remote Monitor Report for February 2018.

EVENTS THAT MIGHT CHANGE THE OUTLOOK

Table 1. Possible events over the next eight months that could change the most-likely scenario.

Area	Event	Impact on food security outcomes
South Sudan	Implementation of December Cessation of Hostilities (COH) agreement.	Implementation of the cessation of hostilities agreement would improve the security situation and allow households to slowly regain access to production. Enhanced access to humanitarian assistance, coupled with improved trade flows, and unhindered movement of people, would also open sources of food and income, mitigating extreme levels of food insecurity. The risk of Famine (IPC Phase 5) would be unlikely.
Yemen	Food imports halted due to destruction of key port infrastructure or major changes in macroeconomic policies that prevent traders from accessing currency to fund imports.	Although informal trade across land borders would be likely, food prices at local markets would increase dramatically, in response to constrained supplies, becoming prohibitive to most poor and displaced households. Food security outcomes would likely deteriorate to Famine (IPC Phase 5).

SEASONAL CALENDAR FOR A TYPICAL YEAR



Source: *FEWS NET*

ABOUT SCENARIO DEVELOPMENT

To project food security outcomes, FEWS NET develops a set of assumptions about likely events, their effects, and the probable responses of various actors. FEWS NET analyzes these assumptions in the context of current conditions and local livelihoods to arrive at a most likely scenario for the coming eight months. Learn more here.