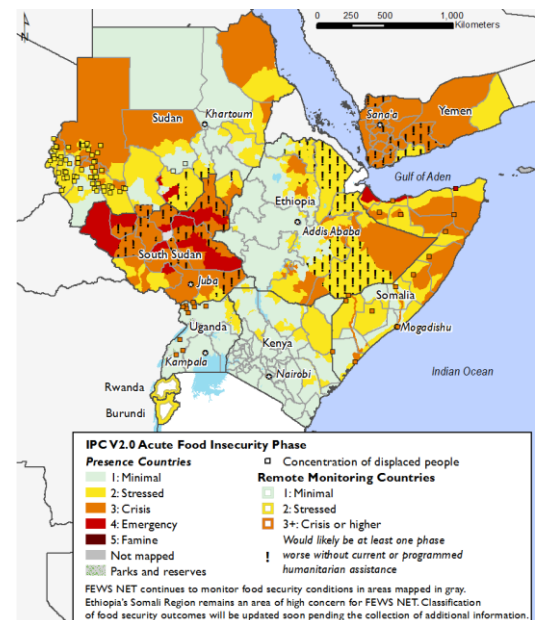


Humanitarian assistance and improved seasonal performance mitigate a deterioration in food security

KEY MESSAGES

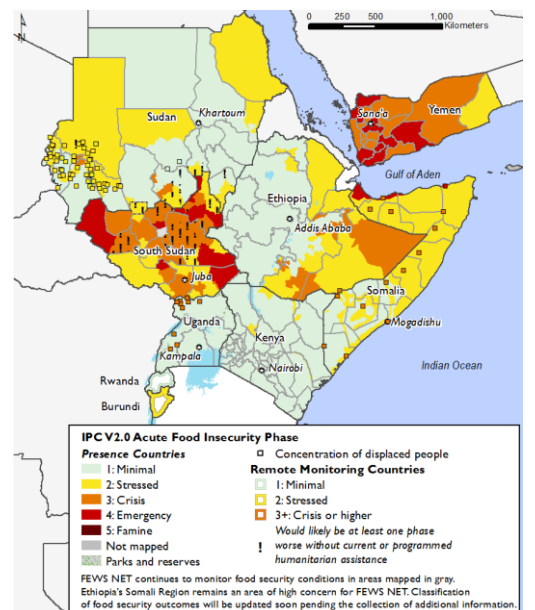
- Across East Africa, Emergency (IPC Phase 4) outcomes persist in parts of South Sudan, Sudan, Somalia, and Yemen, while Crisis (IPC Phase 3!) prevails in other parts of South Sudan and Yemen as humanitarian assistance is mitigating outcomes that are primarily conflict driven. In many previously drought-affected areas of the region, better seasonal performance has driven substantial improvements in Ethiopia's Somali Region and pastoral areas of Kenya and Somalia.
- The areas of greatest concern in the region remain Yemen and South Sudan, where in a worst-case scenario Famine (IPC Phase 5) is possible. In Yemen, this may occur if there are significant declines in commercial imports and conflict cuts off populations' access to trade and humanitarian assistance, and in South Sudan it is possible if there is a sustained absence of assistance for an extended period of time.
- In Ethiopia and Somalia, the above-average *Gu* rains, coupled with the continued delivery of humanitarian assistance, have improved food security outcomes. Crisis (IPC Phase 3) outcomes are expected in Ethiopia's Somali Region and Stressed (IPC Phase 2) outcomes persist across larger areas of Somalia. However, Somalia's Guban Pastoral Livelihood Zone is likely to remain in Emergency (IPC Phase 4) through January 2019. In addition, food security outcomes have deteriorated for about one million conflict-displaced people along Ethiopia's Oromia-Somali regional border.
- In Sudan, well above-average staple food prices are expected to constrain poor households' purchasing power, likely exacerbating outcomes, particularly for IDPs in SPLM-N controlled areas of South Kordofan. While the March to June rains have been above normal seasonal levels in most of Burundi, Kenya, Rwanda, Somalia, Ethiopia, and Uganda, severe flooding, population displacement, destruction of crops, livestock, and infrastructure, coupled with an upsurge of vector and water borne diseases, including the Rift Valley Fever in Kenya, have disrupted livelihoods in flood-affected areas. The loss of livelihood assets has limited access to food and income in riverine areas, worsening food security.

Projected food security outcomes, June to September 2018



Source: FEWS NET

Projected food security outcomes, October 2018 to January 2019



Source: FEWS NET

FEWS NET classification is IPC-compatible. IPC-compatible analysis follows key IPC protocols but does not necessarily reflect the consensus of national food security partners.

OUTLOOK BY COUNTRY

Ethiopia

- A recent FEWS NET survey in Dollo Zone of Somali Region suggests food security and nutrition outcomes have improved significantly in areas worst-affected by drought in 2016 and 2017. These improvements are largely due to improvements in seasonal performance, continued humanitarian assistance delivery, and declines in disease outbreaks. Currently, worst-affected areas such as Dollo Zone and much of southeastern Somali Region are in Crisis (IPC Phase 3), with humanitarian assistance preventing a further deterioration among some populations, particularly IDPs.
- While the risk of a deterioration beyond Emergency (IPC Phase 4) has declined, continued humanitarian assistance is needed through at least September, in order to sustain improved outcomes and offset seasonal declines in food access during the June to September dry season. Starting in October, improvements in livestock productivity, particularly from camels, should begin to drive longer-term improvements in food security.
- More than one million people are displaced in Ethiopia, most of whom have been displaced by conflict starting in September 2017 and many of whom are displaced along the Oromia-Somali regional border where conflict has been reported to be most severe. In the near-term, this displacement is driving large-scale, multi-sectoral assistance needs. Disruptions to households' ability to engage in their typical livelihoods activities, such as seasonal cultivation and raising of livestock, are likely to drive Crisis (IPC Phase 3) outcomes, particularly in far western Somali Region and in southern SNNPR.
- The 2018 *Belg* (March to May) rains performed very poorly over most northern *Belg*-producing areas, leading harvests to be as much as 40 percent below average and delayed by one to two months. Areas worst-affected include eastern Amhara and southern Tigray. Meanwhile, *Belg* harvests are improving food security outcomes in SNNPR, and the onset of *Kiremt* (June to September) seasonal rainfall has been near to slightly above average over most *Kiremt*-receiving areas of the country.

For more information, see the [Ethiopia Food Security Outlook from June 2018 to January 2019](#).

Kenya

- The 2018 March to May long rains were the heaviest in the past 55 years. This caused significant flooding, especially along riverine areas across the country and leaching of cropland, but overall drove recovery in previously drought-stricken areas, improving food security outcomes, particularly in pastoral areas. Currently the highest area of food insecurity is in flood-affected Tana Riverine Zone, where inaccessible households are facing Crisis (IPC Phase 3) outcomes. However, assistance is likely to reach these areas by July.
- Stressed (IPC Phase 2) outcomes are expected to persist through September in Wajir, parts of Marsabit, Isiolo, Turkana, Garissa, Mandera, and Tana River due to various factors, including livelihood recovery from drought and/or flooding, a livestock quarantine from an outbreak of Rift Valley Fever (RVF), and insecurity. However, with the favorable forecast for the October to December rainy season, further improvements are expected, which will lead to Minimal (IPC Phase 1) outcomes across most of the country.
- Through January 2019, food availability and access are likely to be favorable across most areas of Kenya. Overall, the ongoing marginal harvest, followed by the October unimodal harvest, and then the next marginal harvest, beginning in December, are all projected to be average to above average. Staple food prices are forecast to remain below last year's and the five-year average due to available local stocks and above-average regional imports. This will continue to increase poor household purchasing power.

For more information, see the [Kenya Food Security Outlook from June 2018 to January 2019](#).

Somalia

- Food security has improved significantly in many of the areas worst-affected by the 2016/17 drought, as a result of large-scale humanitarian assistance and improvements in seasonal performance. Most areas of the country are currently Stressed (IPC Phase 2), though Crisis (IPC Phase 3) outcomes exist in some areas and among IDP populations. Between July and September, in the absence of continued humanitarian assistance, Crisis (IPC Phase 3) outcomes are likely in riverine livelihood zones and northern and central Somalia. Emergency (IPC Phase 4) is likely in Guban Pastoral livelihood zone.

- Food security is expected to improve between October and January, driven by seasonal improvements, and most areas will be Stressed (IPC Phase 2), though some populations throughout Somalia will be in Crisis (IPC Phase 3) or worse. Areas of greatest concern are IDP settlements, most of which will be in Crisis (IPC Phase 3), and Guban Pastoral livelihood zone, where poor households have very few saleable animals to purchase food and will likely remain in Emergency (IPC Phase 4).
- April to June *Gu* rainfall started earlier than normal and was significantly above average. Below-average *Gu* production in July is likely in riverine areas where floods caused substantial crop losses, though above-average production is likely in rainfed areas. Overall the harvest in July is expected to be average. Flooding increased recession cultivation opportunities and the September off-season *Gu* harvest is expected to be above average.
- There is an elevated likelihood of an El Niño event occurring in late 2018, driving above-average rainfall during the October to December *Deyr* season. *Deyr* rainfall is expected to support average production and normal livestock births and productivity in most areas, though flooding will likely cause crop losses in riverine and lowland areas.

For more information, see the [Somalia Food Security Outlook from June 2018 to January 2019](#).

Sudan

- Sharp increases in staple food prices are likely to exacerbate the severity of food insecurity among populations affected by severe dryness and/or displacement in 2017. Between June and September 2018, IDPs in SPLM-N controlled areas of South Kordofan are likely to be in Emergency (IPC Phase 4), while poor households in North Darfur and Kassala states and IDPs in Jebel Marra will be in Crisis (IPC Phase 3). Across Sudan, assistance needs among poor households are likely to be higher than normal due to very high staple food prices.
- Staple food prices are expected to remain very high through January 2019, even though harvests starting in October 2018 could lead to small declines. Food security outcomes are expected to improve starting in October, following seasonal improvements in livestock productivity and as households access own-produced foods and earn in-kind income from agricultural labor. However, the number of people requiring emergency food assistance is likely to remain at above normal levels during the harvest period.
- Persistent long-term difficulties accessing foreign exchange in Sudan has resulted in severe fuel shortages and sharp increases in fuel prices between March and May 2018. Despite recent improved fuel availability in Khartoum, persistent fuel shortages during the planting season and sharp price increases for agricultural inputs are likely to reduce planted area and yields during the 2018 agricultural season to below-average levels, despite forecasts for above-average main season rainfall across many areas of Sudan.

For more information, see the [Sudan Food Security Outlook from June 2018 to January 2019](#).

Uganda

- Rainfall was well above average during the March to May first season in bimodal areas and the first half of the April to September main season in Karamoja. In many areas, this has been the wettest March to May period on record. Heavy rainfall led to localized floods, landslides, and water logging, which in turn caused an unconfirmed number of deaths, displaced households, and damaged infrastructure and crops. These incidents are highly concerning, though not widespread. In general, the heavy and evenly-distributed rainfall has been beneficial for crop development, and above-average first season production is expected.
- In bimodal areas, Minimal (IPC Phase 1) outcomes are expected throughout the projection period as poor households meet their basic food and non-food needs with above-average harvests and market purchases at below-average prices. In Karamoja, Stressed (IPC Phase 2) outcomes are likely through July, an extended lean season. However, improvement to Minimal (IPC Phase 1) is expected after August when households harvest around four months of cereal and can purchase food at below-average prices.
- Due to continued conflict in South Sudan and the Democratic Republic of Congo, additional refugees from both countries are expected during the projection period. Ongoing humanitarian assistance remains the key food source among refugees and it is expected that most are Stressed (IPC Phase 2!), but would be in Crisis (IPC Phase 3) in the absence of assistance.

For more information, see the [Uganda Food Security Outlook from June 2018 to January 2019](#).

Yemen

- The recent offensive in Al Hudaydah City raises significant concern about the potential for significant damage or disruption to imports through the Red Sea ports. As of July 11, the Red Sea ports remain open commercial and humanitarian imports continue according to UNVIM reports, while trade routes between the ports and key markets remain open. Since the military offensive in Al Hudaydah City began, prices have only slightly increased for wheat flour and fuel.
- 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).
- Between June and October, large parts of Yemen are expected to remain in Crisis (IPC Phase 3), while in many areas ongoing, large-scale assistance is expected to prevent a deterioration to Emergency (IPC Phase 4). Humanitarian assistance continues to play a major role in helping to protect food consumption for approximately one-third of Yemen's population each month. Due to uncertainty with regard to funding of emergency food assistance beyond November 2018, for the purposes of this scenario FEWS NET assumes no assistance will be provided, and large areas of Yemen will deteriorate to Emergency (IPC Phase 4) between December 2018 and January 2019.

For more information, see the [Yemen Food Security Outlook from June 2018 to January 2019](#).

Remote Monitoring Countries¹

Burundi

- With the Season B harvest likely to be slightly above average at the national level, food availability is already increasing in many areas. Following consecutive favorable seasons over the past year, food security is improving for many poor households, allowing more to be in None (IPC Phase 1). In the Imbo Plains Livelihood Zone, however, March and April flooding caused significant crop and infrastructure losses and Stressed (IPC Phase 2) outcomes are expected to persist through January 2019. For those most severely affected, particularly the displaced, Crisis (IPC Phase 3) is more likely.
- With the initial June harvests, the prices of staple foods have fallen, remaining lower than last year and about equal to the five-year average. Bean prices have likewise declined, despite expected production shortfalls. Household purchasing power also increased as the Government of Burundi re-opened domestic markets for small ruminants, following a promising vaccination campaign, which no longer prohibits poor households from this income-earning opportunity.
- While there was a temporary increase in displacement from flooding, the total number of IDPs continues to decrease overall, and the flow of returnees from Tanzania strengthens. Many recent IDPs and returnees, as well as the 32,000 Congolese refugees living in camps depend on humanitarian assistance to meet their minimum food needs. As WFP and UNHCR face funding shortfalls, these vulnerable populations are expected to face Crisis (IPC Phases 3) outcomes through January 2019 in the absence of assistance.

For more information, see the [Burundi Remote Monitor for June 2018](#).

Rwanda

- Food availability and access have generally improved, as the Season A harvest at the national level is expected to be slightly above-average. However, the heavy March to May rains caused significant numbers of deaths as well as infrastructure and crop losses, which have impacted livelihoods. In worst-affected districts of Rutsiro and Karongi in Western Province, Stressed (IPC Phase 2) outcomes are expected through September, until rehabilitation efforts are fully established and Season C harvesting peaks. Minimal (IPC Phase 1) outcomes will prevail elsewhere in the country through January 2019.

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.

- According to the National Institute of Statistics (NISR), between April and May, cereal prices increased marginally by 2.3 percent, but non-cereal staples, including beans, rose by 6.7 percent. Key informants report that in June staple food prices are easing with the initial harvests. With the exception of isolated mountain localities where roads were severely damaged, markets are well supplied by domestic production and Ugandan and Tanzanian imports.
- According to UNHCR, the total number of refugees in Rwanda decreased by approximately 21,000 from January 2018 to the end of May, primarily due to Burundian returnees. However, small numbers still continue to flee to Rwanda. Food assistance to refugees in camps is still 25 percent below daily requirements because of funding shortfalls. Although the Government of Rwanda promotes refugees' access to livelihoods and plans to include them in national safety nets, the refugees would face Crisis (IPC Phase 3) outcomes without humanitarian assistance.

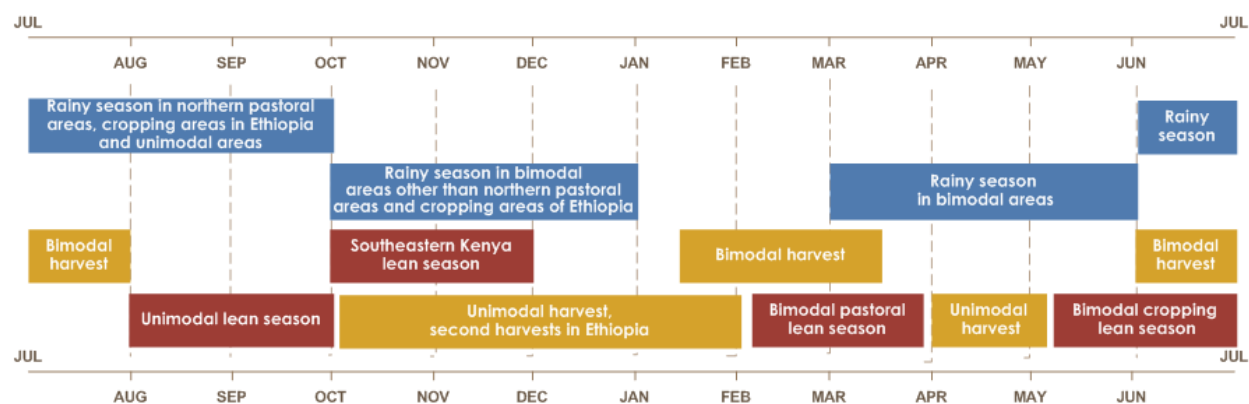
For more information, see the [Rwanda Remote Monitor for June 2018](#).

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
Ethiopia (Somali Region)	Prolonged disruptions to provision of emergency food assistance	While improvements in the seasonal performance have enhanced access to some food and income sources, humanitarian assistance remains critical in avoiding a severe deterioration in food security. Pastoralists lost large herds of livestock and discontinuation of humanitarian assistance is likely to result in households facing large food consumption gaps, leading to increased levels of acute malnutrition and the increased risk of mortality, particularly during the June to September 2018 dry season.
South Sudan	Implementation of June 2018 Cessation of Hostilities (COH) agreement	Implementation of the cessation of hostilities agreement would improve the security situation, allowing access to farms, opening up trade routes, expanding labor options, while allowing wider movement of pastoralists across the rangelands. Subsequently, access to food and income sources would improve toward the end of 2018, mitigating the risk of Emergency (IPC Phase 4) or Famine (IPC Phase 5).
Horn of Africa	Poor October to December <i>Deyr</i> /long rains season	Below-average <i>Deyr</i> rains could cause a rapid decline in food security, eroding impacts of the favorable April to June <i>Gu</i> /short rains across southern and central areas of Somalia, Ethiopia's Somali Region, and eastern pastoral areas of Kenya. Particularly for Ethiopia and Somalia, low livestock holdings and a succession of previous poor seasons, would likely result in severe food security outcomes.

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.](#)