



Acknowledgement of contributions from District Officers; Commercial Traders (Kampala); Uganda Department of Meteorology; Market Information Service/International Institute of Tropical Agriculture and non-government organizations.

Summary

Recent harvests and improving livestock/ crop terms of trade have led to better household food security and food access.

A sizeable proportion of internally displaced persons (IDPs) in Gulu, Kitgum and Pader Districts are enjoying comparatively better food security due to a lull in attacks by rebels of the Lord's Resistance Army (LRA).

Most second season annual crops in bimodal areas were sown by late September. Adequate growing conditions augur well for normal crop development.

September 2003 retail prices continue to be higher than prices for past years, although the price variations were less pronounced than in the previous months, indicating better market access. In civil insecure eastern Uganda there was severely limited access to fields for harvesting, and prices rose suddenly after the harvest period.

1. Normalizing Food Access and Food Security in Agro-pastoral Karamoja Region; Better Access to food and fields in Northern Uganda.

Normal crop harvesting began in September and is currently underway in Kotido, Moroto and Nakapiripirit Districts of Karamoja, improving household food access and food security. Relatively low rainfall in the region augurs well for crop drying and storage. Crop cultivators in the agro wet western and agro pastoral central zones are busy harvesting maize, millet and

peas, among other crops, improving varieties and quantities of food available. The onset of the harvest and increasing supplies of crop commodities are beginning to impact market conditions, and prices have begun declining. On average, grain prices per kilogram are between UShs 100 to 150 (USD 0.05-0.08) lower compared to four months ago at the peak of the "hunger period". Further price reductions are expected in the coming weeks.

Livestock prices are gradually increasing and are now between 40 and 75 percent higher than April 2003 levels, when they hit record lows as households sold off livestock to purchase grains for consumption. Currently, the price of a mature head of cattle ranges between UShs 120,000 and UShs 350,000 (USD 60-175); the latter is the approximate price of a mature bull. Improving livestock prices are restoring the purchasing power of agro pastoral and pastoral households, who are now able to purchase up to 9.4 months worth of grain per mature head of cattle sold as crops are being harvested. However, where the harvest is yet to start, or where low production is expected this year, a mature head of cattle still trades for only 2.2 months worth of grain for an average family of six, much like four months ago. For the very resource poor households relying on casual labor, the amount of grain that a day's wage can procure is sufficient

to meet a day's food requirements for 4-6 persons.

A normal harvest this year is encouraging Karimojong households to plan and undertake traditional and cultural rites, including entry to manhood, funerals, marriages, etc. Because these ceremonies typically involve consumption of large quantities of food, households had deferred these events when food stocks were low. This deferred consumption will now take place, and levels of consumption will be above average for this time of year. This may trigger an earlier onset of diminished food security as stocks are depleted.

Relative calm is reported in Gulu, Kitgum and Pader districts of northern Uganda, where the Lord's Resistance Army (LRA) rebel presence has reduced following their move into eastern Uganda. Civil insecurity is high in Eastern Kitgum District (Chua County), which is both a major route for the rebels as they come from and return to their bases in southern Sudan and an area that has suffered attacks by the marauding Karimojong warriors. As a result, there are new displacements with approximately 90 percent of the county population displaced from their homes. The increasing requirement for humanitarian assistance is raising concern among district officials and humanitarian organizations.

In other locations of the Gulu, Kitgum and Pader Districts, the relative calm has allowed some IDPs better access to fields near camps to harvest crops from the first

season as well as plant second season crops, as possible. As a result, many IDPs are able to meet a large proportion of their own food needs, with additional food assistance from the UN World Food Programme (UN WFP). Preliminary results of an Emergency Food Needs Assessment (EFNA) in Gulu District show that many IDPs meet between 40 and 60 percent of their own food needs, depending on the location of the camp and the prevailing security over the last couple of months. On the other hand, IDPs in Kitgum District have relatively limited access to fields, and reports indicate that they are only able to meet between 20 and 30 percent of their food needs, a trend similar for almost all the camps in Pader District. An EFNA assessment is planned for Kitgum and Pader Districts to verify and inform humanitarian assistance to the region.

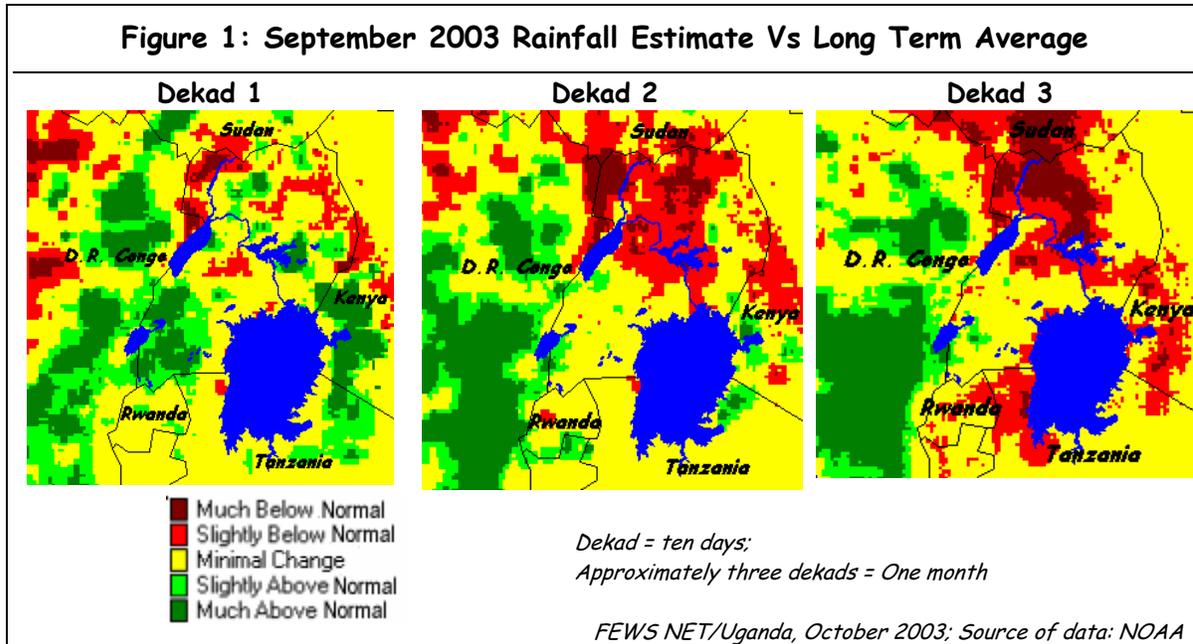
There is appreciable market activity in Gulu and Kitgum Districts, where commodity prices have dropped in the former but remain stable in the latter.

Most local markets in Pader District have very low stocks of basic food items, and prices have risen accordingly: millet (30%), sorghum (25%) and beans (15%).

2. National Trends

2.1 Agro-climatic Conditions

Field reports by district agricultural officials indicate higher than normal rainfall in western and southwestern districts during the first half of September 2003. Areas of eastern and northeastern Uganda received predominantly below-normal to normal



rainfall, conforming to the forecast issued by the Uganda Department of Meteorology in August 2003. Rains have diminished in the northeastern districts of Kotido, Moroto and Nakapiripirit, signaling the beginning of the normal dry season. Contrary to the forecast for normal to higher than normal rainfall, district officials and non-government organizations in northern and northwestern reported lower than normal rainfall during much of September.

The *Meteosat* images (Figure 1) compare September 2003 rainfall estimates and the long-term average and confirms much below normal rainfall in northern and northwestern Uganda.

2.2 Crop Production and Conditions

The second cropping season is nearly half way through in districts of central, eastern and northern Uganda. Sowing of a major proportion of annual crops in most bimodal district was complete by late September. Crops sown this season include beans,

maize, millet, peas and sorghum among others, most of which have germinated. Root crops and tubers, such as cassava, sweet potatoes and yams, have also been cultivated. Beans in key growing districts are nearing the flowering stage.

Optimal growing conditions (mainly adequate rainfall and low pest infestation) are reported in most districts of Uganda.

In Kapchorwa District (eastern Uganda), middle altitude farmers will start harvesting maize by mid-October, while the main harvest will begin later in the month. The dry commodity is expected to enter the market by late November and will boost the supply for local (in country) and export demands.

3. Commodity Prices, Food Availability and Access

September 2003 retail price continued to be higher than prices for past years, maintaining a trend observed since the beginning of the year. Markets across the country reported generally higher September 2003 retail prices for major staple crops compared to the same period last year and the three-year average (2000-02) for September (Table 1). Nonetheless, supplies remain adequate, and price variations in September 2003 were less pronounced than in the past month, indicating improved affordability of markets for dependent households.

Maize prices declined for maize from August to September in major producing areas (Iganga and Masindi) and in per mature head of cattle sold the major consumption market, Kampala, due to better supplies of the dry commodity.

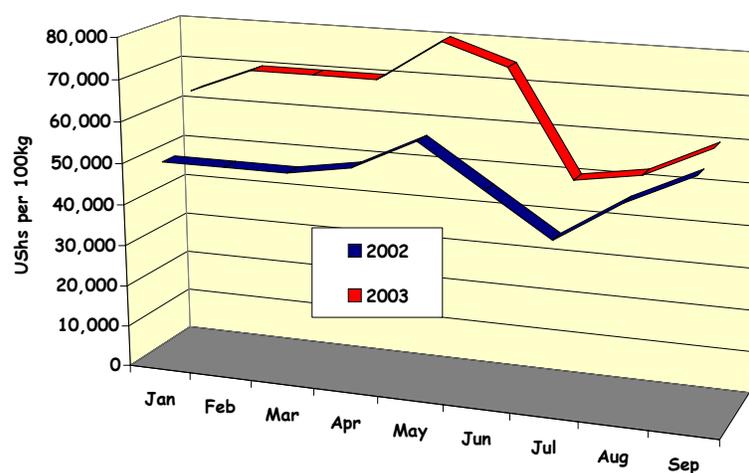
In Soroti District, an area in eastern Uganda experiencing civil insecurity, an upward trend in general crop prices has been observed. Civil insecurity had limited access to fields for harvesting, and

Table 1: Retail Prices in Select District Markets

	Percentage change from			
	September (2003)	August (2003)	September (2002)	Average: September (2000-2)
Maize				
Kampala	34,167	-2%	-9%	-9%
Iganga	36,250	-17%	41%	50%
Masindi	22,750	-9%	7%	28%
Millet				
Lira	34,500	-5%	15%	17%
Gulu	39,000	1%	36%	32%
Tororo	45,000	0%	29%	24%
Beans				
Mbale	47,500	9%	9%	5%
Masaka	60,000	14%	0%	3%
Kasese	57,500	12%	5%	10%
Bananas				
Mbarara	10,750	-14%	1%	-11%
Masaka	16,925	12%	69%	36%
Mbale	23,000	14%	67%	2%
Cassava Chips				
Tororo	32,500	4%	117%	24%
Soroti	30,000	9%	100%	26%
Lira	20,000	-11%	-20%	-34%

FEWS NET Uganda, October 2003; Source: Market Information Services

Figure 2a: Retail Prices in Soroti, Jan. to Sep. 2003 Vs 2002
Beans



prices began to rise as it became clear that markets could not be supplied locally. The price of millet, a major food crop in the district, started rising in August immediately after the usual harvest period (Figure 2b).

Figure 2b: Retail Prices in Soroti, Jan. to Sep. 2003 Vs 2002
Millet

