



Acknowledgement for contributions to: District Agriculture and Veterinary Officers; Karamoja Agro-Pastoral Development Program, Moroto; Market Information Service/International Institute of Tropical Agriculture; OXFAM GB-Kotido;

Summary

- *Grain prices in agro-pastoral Karamoja have risen a further 25 percent since April, while livestock prices have stayed the same, eroding terms of trade for pastoralists.*
- *Preliminary results from a WFP/UNICEF/Ministry of Health nutritional survey confirm global malnutrition rates of 22.4 and 14 percent in Kotido and Moroto Districts, respectively. Consequently, WFP plans to increase its relief distribution to cover 60 percent of the total households in the region.*
- *An initial estimate of 130,000 MT of beans is projected for this season; 30 percent will be available for commercial sale. National maize production is estimated at not more than 200,000 MT with fifty percent being available for commercial sale.*
- *Dry bean prices have continued rising by an average 20 percent per month since March 2003. Delayed planting this year means that market supplies will only improve significantly after July. Wholesale maize prices in 2003 remained at least 60 percent higher than 2002 prices for the first five months of the year.*

1.0 Current Food Security Conditions and Outlook

The semi-arid agro-pastoral northeastern Karamoja region (comprising Kotido, Moroto and Nakapiripirit Districts) continues to suffer from the effects of the poor 2002 crop. Almost all households in the region have neither cereal nor other food stocks left and are therefore reliant on marketed grain from the neighboring districts of Lira, Mbale, Sironko, Katakwi and Soroti. On average, maize prices in this area have increased 25 percent over April's already high price to US\$ 500/kg. Karamoja's prices are 25 percent higher than those in neighboring districts, where a kilogram sells for US\$ 400. Even these lower prices are about 50 percent higher than for the same period in 2002, indicating reduced cereal availability countrywide.

Cattle prices have remained stable at about US\$ 130,000 per mature animal. However, as a result of the increase in grain prices, terms of trade between livestock and cereals continued to depreciate. For example, a mature animal was only able to fetch the equivalent of 2.5 months of cereals in May, down from 2.8 in April, for an average family of six. This implies that such families need to sell between one and two mature animals to afford sufficient food to meet their requirements until July/August when the 2003 harvest is expected.

Although the number of households selling shoats has increased, the market price has increased slightly to US\$ 16,000 per head, sufficient to procure 1.2 weeks equivalent of grain

to meet requirements for a family of six. Therefore, a family of six would have to sell 10 shoats in order to meet their food requirements until the next harvest.

It is estimated that between 25 to 45 percent of the households in Karamoja are resource poor and rely entirely on agriculture and labor for their food needs. A further 5 to 10 percent own but a small herd of animals. These two categories are the most food insecure households, the former being worst off. Their daily wage is only able to procure enough grain to feed less than 4 persons per day, or the equivalent to 57 percent of requirements for a family of six. Although grain still forms the core component of most households' meals, in-season wild vegetables and fruits are increasingly being used to supplement grain consumption. Grain borrowing from kin and/or other sources is minimal given the overall low grain availability in the area.

Low grain availability, inadequate consumption and other causal factors have resulted in an increase in the rates of malnutrition among the children. Preliminary results from a WFP/UNICEF/Ministry of Health (GoU) detailed nutritional survey conducted in May 2003 confirm global malnutrition rates of 22.4 and 14 percent in Kotido and Moroto districts, respectively, from an earlier assessment in April. As a result, it was recommended that the general relief distribution be widened to cover 96,440 households (60 percent of the total households) in the region and the amount of food increased to 3,000 MT per month (to meet about 30 percent of requirements). Distribution at these new levels began in late May and will continue until August 2003.

Many households in Gulu, Kitgum, Pader and Lira Districts in northern Uganda continue to suffer widespread food insecurity due to Lord's Resistance Army (LRA) activities. Approximately 812,000 internally displaced persons (IDPs) are located in the three districts and depend on the World Food Programme's food aid for most of their food needs. A lapse in the peace negotiations in March 2003 and a higher incidence of insecurity have limited cultivation this season. A high risk of attack on roads hampers travel and humanitarian activities, including food aid distributions, which strictly take place under government military escort, although some settlements are inaccessible due to a lack of military escorts. In addition, traders are not able to deliver commodities from neighboring districts, which could help alleviate local food and non-food shortages.

With the observed reduction in household food stocks, limits on food access through market transfers, and diminishing prospects for any reasonable crop harvests in the region this season, WFP plans to increase its food assistance to the IDPs to meet 100 percent of their food needs. A review by WFP recommended that all 812,000 IDPs continue to receive the full food aid ration until August 2003, implying the agency will be aiming to distribute 12,000 MT of food aid per month under a revised Protracted Relief and Recovery Operation (PRRO) 10121.0. However, with increasing food aid demands and limited resources, the agency predicts severe pipeline breaks in cereal and pulse availability between September and December 2003. Table 1 shows projected monthly food pipeline shortfalls (June to Dec. 2003).

2.0 National Trends: Hazard Information

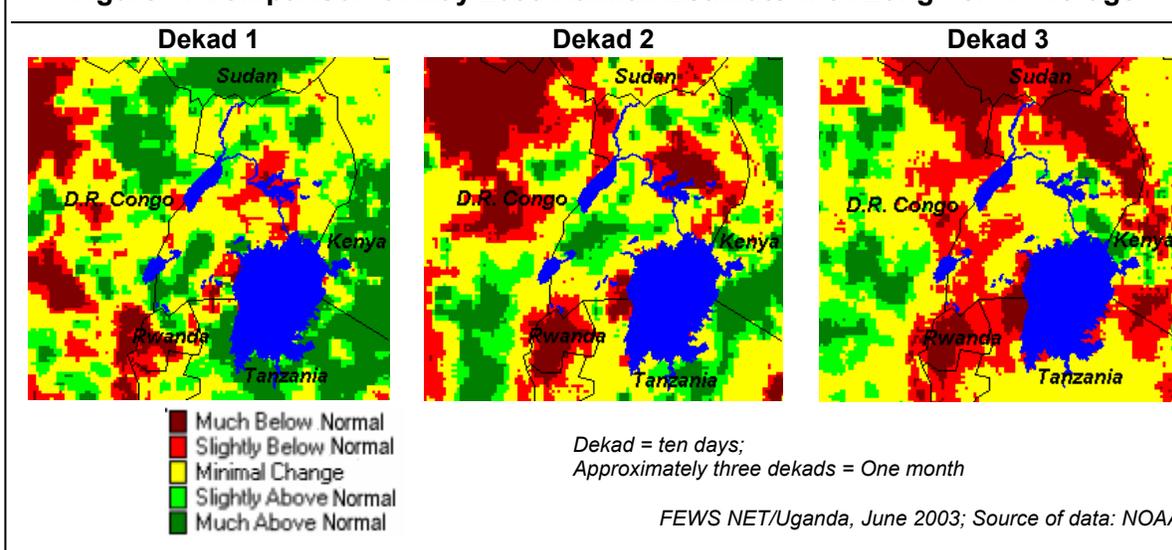
Table 1: Monthly Projected Shortfalls in PRRO 10121.0, June to Dec. 2003

Commodity (Mt)	Cereal	Pulses	Veg. oil	Salt	CSB	Sugar	Biscuits	Total
Monthly Requirement	12,088	1,855	576	92	1,628	306	16	16,561
Shortfall (June-Dec. 03)	38,872	6,654	339	254	1,601	1,678	129	49,526

Source: World Food Programme, Uganda

2.1 Agro-climatic Conditions: Figure 1, which provides a comparison between May 2003 Meteosat rainfall estimates and the long-term average, shows increasing dryness in the northeastern districts as the month progressed. The 2003 March to June first season (relevant for the bimodal crop growing areas in Uganda) started approximately three weeks late, and the subsequent performance has been mixed. Following well-distributed rainfall that signaled full establishment of the season in April, normal to above normal rains fell in western to southwestern Uganda, giving way to below normal rainfall in the last ten days of the month. Districts in central to eastern Uganda have seen predominantly normal rainfall, albeit sporadic periods of dryness, leading to normal crop growth. Uganda's northeastern agro-pastoral Karamoja region has experienced high variability and poor spatial rainfall distribution, which has negatively affected farmers' activities and crop development.

Figure 1: Comparison of May 2003 Rainfall Estimate with Long Term Average

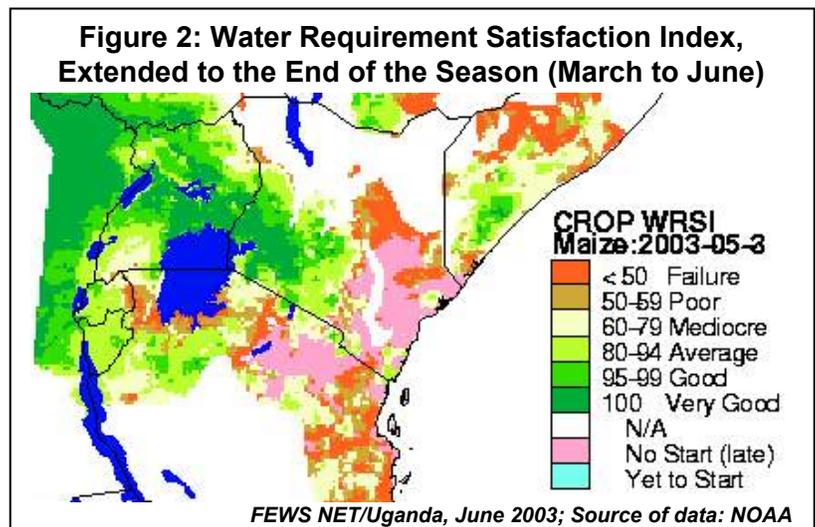


2.2 Crop Growing Conditions: Field observations and reports by district agriculture officials and non-government organizations confirm normal crop conditions in most parts of the country where annual and perennial crops have recovered from the delayed start to the season.

As explained above, however, northern and northeastern Uganda continue to be major food security concerns, each for different reasons. Civil insecurity is hampering access to arable land during the first season in northern Uganda, where humanitarian organizations estimate that fewer than 30 percent of households have been able to cultivate crops. With no foreseeable decline in rebel attacks, prospects for any crops being grown and a harvest realized this season are fast diminishing despite well-distributed rainfall in the region. In the northeastern districts of

Kotido, Moroto and Nakapiripirit, heavy rains in April and early May washed away newly planted and germinated crops, and a lack of replacement seed and dry periods in May have limited crop replanting. After the poor harvest last year, agro-pastoralist households are working hard to replenish food stocks; their success, and the region's food security, depends in part on their ability to replant and the continued performance of the rains. These two regions are being closely monitored for any further deterioration in food security conditions.

In central, eastern and Lake Victoria Basin areas, where the first season is the main one, early bean harvests began in late May. The peak bean harvest (national) is expected at the end of June with dry beans from this season arriving in the market starting in mid-July. Based on current crop conditions, initial national estimates indicate normal bean production at about 130,000 MT this season, of which 25 to 30 percent may be available for commercial sale in local markets and for export.



About fifty to sixty percent of the nation's maize crop, which is grown mainly in eastern, central and mid-western Uganda and represents a major cash income crop for farmers, is in the critical tasseling and grain filling stage and requires adequate moisture until at least early to mid -July to ensure a relatively good harvest. For now, the extended Water Requirement Satisfaction Index (WRSI), an indicator of potential maize performance given rainfall, soil and temperature conditions, suggests that conditions are favorable until the end of the season in June and that average to above average maize performance is expected (Figure 2 on right). Current projections, taking into account the delay in sowing and normal end to the season, put national maize production at not more than 200,000 MT, with fifty percent of this being available for commercial sale. The first season normally accounts for 60 to 70 percent of the country's total maize production. Millet in eastern and northern Uganda districts is forming heads and grain filling with no observed stress yet.

Conditions and supplies of banana, tubers and root crops as well as vegetables are good and support normal household food security in most of the country with no observable stress.

2.3 Pastoral Livelihoods and Livestock Conditions: Relatively ample rainfall in the central to southwestern Uganda "cattle corridor" has enabled livestock's access to adequate pastures and water. Livestock conditions in the region are favorable with no significant limitations to food, health and marketing.

In the northeastern Karamoja pastoral districts, livestock conditions pasture, browse and water conditions have gradually improved across the region since the beginning of the rainy season. Pastoralists are reportedly moving their livestock to wet season grazing areas in central and eastern Kotido, Moroto and Nakapiripirit Districts. Consequently, livestock body and health

conditions are also improving which in turn increases pastoralists' access to milk and other proteins to supplement agro-pastoral households' limited food intake.

According to district officials and non-government organizations active in Moroto District, improved body condition helped stabilize livestock prices in May although they remain low, at an average US\$ 180,000 per mature animal. As explained above, better-off households, who own cattle, sheep and goats, will sell livestock in order to purchase food. Poorer households are working in other people's fields for food or cash income while green vegetables flourish. The medium-term recovery still depends on a good sorghum harvest this season.

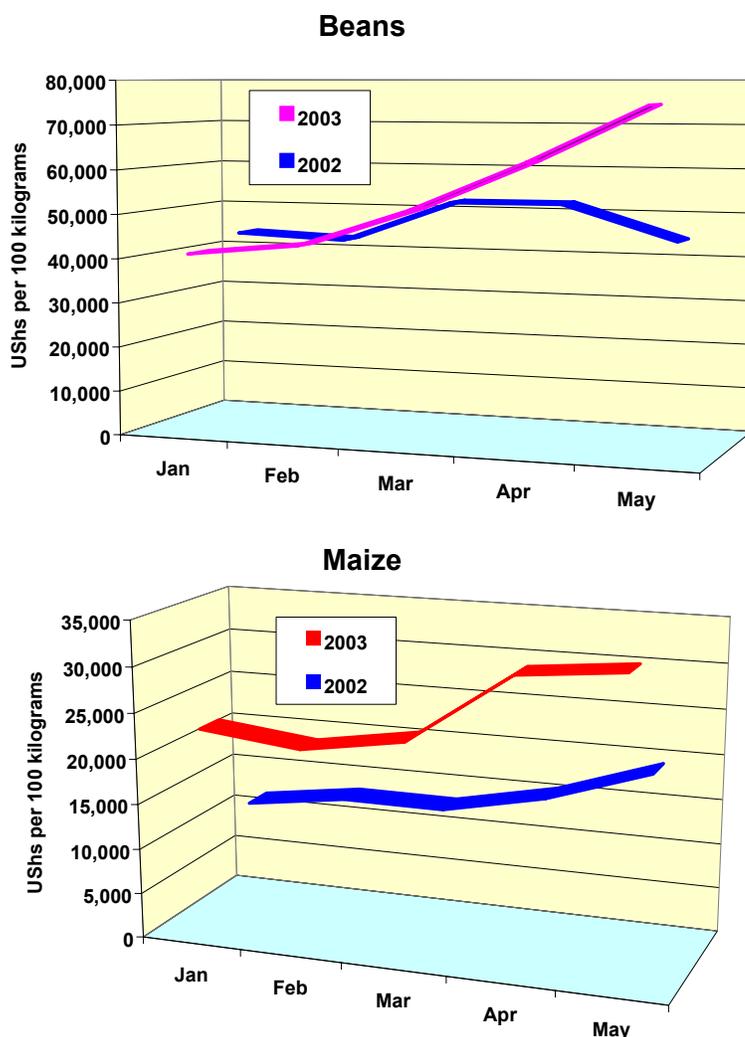
3.0 Market Trends, Trade, Food Availability and Access

In general, prices in major markets have increased for most crops, and in particular for beans and maize. Some of this rise is attributed to increased institutional purchases, as schools and colleges opened, placing a new demand burden on the market.

Figure 3 illustrates wholesale bean and maize prices in Kampala, a key consumption center. Dry bean prices have continued rising by an average of 20 percent per month since March 2003. As a result of the delay in planting this year's bean crop, the early bean crop is not expected on the market before early June (minimal supplies of fresh beans have already come to market). Prices are not yet expected to decline until after the main bean harvest and dry bean crop enters the market some time in July. This is in contrast to 2002 when the early crop was in the market by late April, and the price started to decline in May 2002.

The 2003 wholesale maize prices continued rising in May, remaining more than 60 percent higher than 2002 prices for the first five months of the year. This trend is mainly due to lower than normal maize production in the second season of 2002 compared to production in the

Figure 3: Approximate Wholesale Bean and Maize Prices for Kampala; January - May 2003 vs. 2003



Source: Market Information Service and FEWS NET, June 2003

second season of 2001. Further, higher demands, mainly for relief, have contributed to the prices remaining higher this year. The highest proportion of maize on the market currently is from commercial traders, who have waited to sell their stocks at the higher prices.