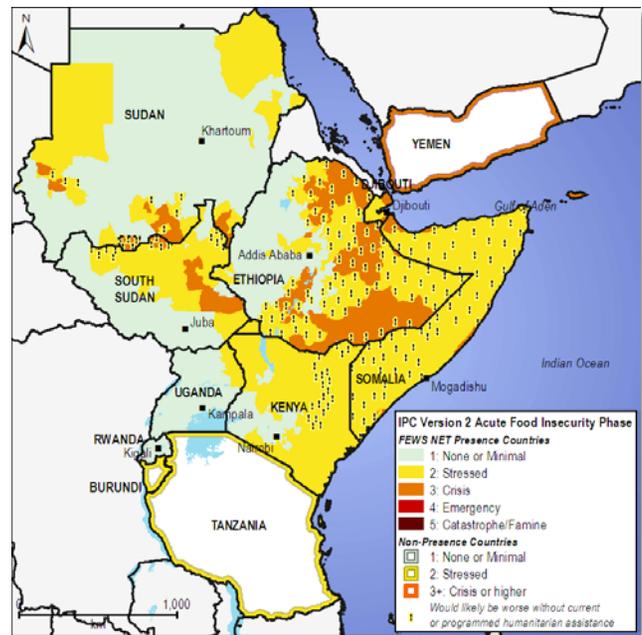


Measured improvements may be sustained from January through June in some areas

KEY MESSAGES

- Significant improvements in current food security outcomes have occurred, even as 12.9 million people remain in the Stressed (IPC Phase 2), Crisis (IPC Phase 3), and Emergency (IPC Phase 4) levels of acute food insecurity.
- The region’s worst food security outcomes are found in the areas expected to be in Crisis (IPC Phase 3) either now or by June including southern Tigray, eastern Oromia, eastern Amhara, parts of Southern Nations, Nationalities, and Peoples’ Region (SNNPR), southern and northern Somali Region, and northern Afar in Ethiopia, parts of South Kordofan and Darfur in Sudan, parts of the Guban pastoral and Coastal Deeh pastoral livelihood zones in Somalia conflict-affected areas in Jonglei, Northern Bahr El Ghazal, Warrap, and Unity States in South Sudan, and northwestern Djibouti.
- Favorable March to May rains would consolidate recovery in key areas of concern, which are dependent on the rains including most of Somalia, Kenya, and southern and eastern Ethiopia, but rains that performed less well would likely increase food insecurity in these areas.

Figure 1. Projected food security outcomes, January to March 2013



Source: FEWS NET

This map represents *acute* food insecurity outcomes relevant for emergency decision-making, and does not necessarily reflect *chronic* food insecurity. For more information on this scale, please visit www.fews.net/foodinsecurityscale.

REGIONAL OVERVIEW

Current Situation

The East Africa region has experienced a steady improvement in household food security for many households over the past year after the devastating food security crisis the eastern Horn of Africa in 2011. Improvements in food security are attributed to a combination of factors including increased household food supplies from harvests in Sudan, South Sudan, parts of Somalia, Ethiopia, Kenya, Uganda, and Rwanda. There’s also been a decline in food prices in many parts of the region, benefiting traditionally market-dependent poor households. Livestock productivity has recently improved in Sudan, South Sudan, most parts of Somalia, Ethiopia, Djibouti, and Kenya. Conflict has eased in some areas in southern Somalia, South Sudan, and Sudan. Also, the continued provision of humanitarian assistance to rural and urban food insecure populations, refugees, and internally displaced persons (IDPs) has had an impact on improved food security. Nevertheless, an estimated 12.9 million people in Sudan, South Sudan, Somalia, Ethiopia, Kenya, Djibouti, Uganda, Rwanda, Tanzania, and Burundi, continue to face Stressed (IPC Phase 2), Crisis (IPC Phase 3), and Emergency (IPC Phase 4) levels of food insecurity. While overall numbers of the food insecure remain high compared to other regions of Africa, many have recently shifted to lower food insecurity classifications, though they remain food insecure. The numbers are expected to remain high from January through June, partially because of recurrent seasonal shocks and the continued, chronic vulnerability to a wide

variety of new shocks. Sustained high numbers facing acute food insecurity are attributed to reduced productivity of livelihoods, resulting from previous asset losses, poor crop production in parts of Somalia, Ethiopia, and Kenya, continued high food price inflation in Sudan, South Sudan, and Ethiopia, the impacts of continuing and renewed conflict in Sudan, South Sudan, and southern and central Somalia, and production losses and displacements due to flooding in Sudan and South Sudan.

The June to September rains were largely normal to above normal in the areas that receive these rains including western and central Ethiopia, Sudan, South Sudan, northern Somalia, Djibouti, the western highlands in Kenya, and Eritrea. Subsequently, overall crop production was average to above average in Sudan, South Sudan, northwestern Somalia, central and western Ethiopia, and western Kenya during the October to January harvests. Flooding caused crop damage in parts of Sudan, Jonglei, Warrap, and Unity States in South Sudan, and some areas near Lake Victoria in western Kenya. However, this production from this season was below average in parts of Karamoja in northeastern Uganda and marginal cropping areas in eastern Ethiopia.

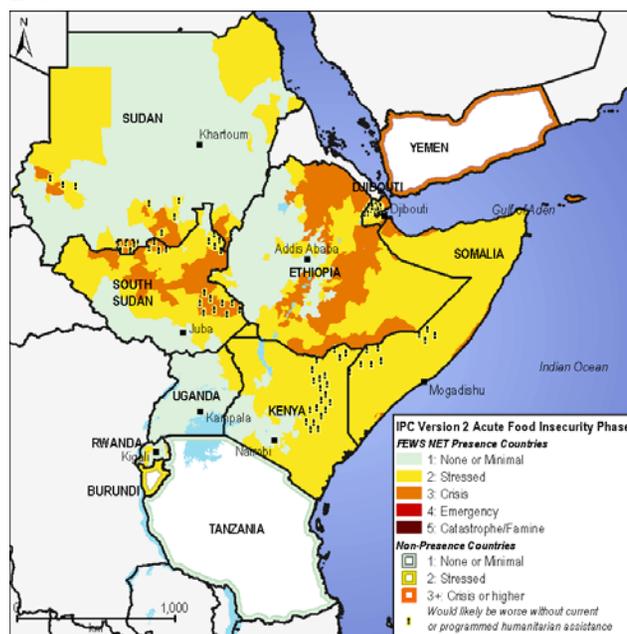
The just concluded October to December rains are particularly important in the eastern sector of the region, including most of Somalia, southern and southeastern Ethiopia, eastern and southeastern Kenya, and bimodal areas of Uganda, Rwanda, Burundi, and northern Tanzania. The rains in most of the eastern Horn were characterized by an erratic onset and mid-season dry spells, but in the southern-receiving areas in Kenya and Tanzania, they continued into January. However, significant areas in southern and northwestern Somalia, Somali and southern Oromia Regions in Ethiopia, western Kenya, most of Uganda, Rwanda, Burundi, and the southern and western highlands of Tanzania received above normal rains between October and December.

Subsequently, overall crop output and prospects are average to above average in southern Somalia, most of Uganda, Rwanda, Burundi, and the southern and western highlands of Tanzania. However, poor crop output is anticipated in areas that received below average rains or very erratic rains from October to December. The areas include eastern marginal *Meher* areas of Ethiopia including East and West Hararghe Zones in Ethiopia, the southern and coastal lowlands in Kenya, northern Tanzania, northwestern and southeastern Burundi, and areas in eastern and western Rwanda. Production has also been reduced by localized hazards such as flooding, plant diseases, and pest infestation.

Assumptions

- Above average cereal output in Sudan, South Sudan, and most of Somalia will moderate inflationary pressures as many households will be less dependent on the market for food than average and much less dependent than last year.
- Impacts of conflict including population displacements and restricted access to commodity markets, labor markets, grazing resources, production inputs, and humanitarian assistance will persist in conflict epicenters, moderating gains in food security for households in areas of active conflict in Sudan, South Sudan, Somalia, parts of Kenya, and Ethiopia.
- Staple food prices are likely to remain at their current levels or decrease further in many parts of the region from January to March due to recent harvests since October in most parts of Sudan, Somalia, western Ethiopia, western Kenya, most of Uganda, Rwanda, and southern and western Tanzania. However, food prices are anticipated to begin to rise earlier in South Sudan starting in February due to the large import gap and in the pastoral and *Belg*-cropping areas of Ethiopia starting in from March as lean seasons set in or progress.

Figure 2. Projected food security outcomes, April to June 2013



Source: FEWS NET

This map represents *acute* food insecurity outcomes relevant for emergency decision-making, and does not necessarily reflect *chronic* food insecurity. For more information on this scale, please visit www.fews.net/foodinsecurityscale.

- With both body conditions and demand expected to remain seasonally normal, livestock prices are anticipated to remain high in Sudan, South Sudan, northwestern Kenya, Karamoja in northeastern Uganda, southern and southeastern Ethiopia, and most of Somalia. Livestock prices are anticipated to decline due to poor body conditions in Guban, Nugal Valley, and Sool Plateau pastoral livelihood zones in northern Somalia, northwestern Ethiopia, northern and eastern Kenya, and northern Tanzania.
- The influx of refugees out of conflict epicenters into neighboring, safer areas is expected to continue through June into the northern states of South Sudan such as Unity and Upper Nile, Abyei area, western and northern Ethiopia, Garissa and Turkana Counties in Kenya, western Rwanda, South Sudan, and Uganda.
- The lack of and delays in provision of planting seeds and tuber cuttings is likely to reduce planted area and ultimately production in the sweet potato growing areas in the Southern Nations, and Nationalities, and Peoples' Region (SNNPR) in Ethiopia and in some cropping areas in Kenya.
- Based upon international and national forecasts, land surface temperatures are likely to be above average in much of the eastern Horn of Africa during the January to March dry season. Above average land surface temperatures are likely to cause more rapid than usual depletion of pasture, browse, and water in Somalia, northern and eastern Kenya, and southern and eastern Ethiopia.
- Increased livestock migration from areas that received below average June to September rains is likely to promote competition for grazing and water resources and lead to conflict in South Sudan's Eastern Flood Plains livelihood zone, from the border areas of South Kordofan and East Darfur in Sudan to South Sudan, and from northeastern pastoral rangelands to eastern cropping lowlands in Kenya.
- Rainfall in January in the eastern parts of the region, including eastern Kenya, southern, northeastern and parts of the Hawd in Somalia, and southeastern Ethiopia is likely to increase pasture, browse, and water availability, but it will have limited impact in improving crop prospects.
- The Productive Safety Nets Program (PSNP) will continue for 6.89 million people in Ethiopia from January to July, while humanitarian assistance will support about 60 percent of Djibouti's population.
- Informal cross border trade will increase in areas that have experienced improved security including southern Somalia, southern areas of Sudan, and some northern areas of South Sudan.

Most Likely Food Security Outcomes

Improvements in food security are likely to be upheld in most parts of the region, through the end of June. The exceptions where food insecurity is likely to deepen to Crisis (IPC Phase 3) include the conflict-affected areas of South Sudan and in areas that experienced a poor season, the conflict-affected in South Kordofan, Blue Nile, and Darfur States in Sudan, northern Afar, southern and western Somalia, southern Tigray, eastern Oromia, eastern Amhara, and eastern SNNPR in Ethiopia, some agropastoral areas in southern Somalia, among IDPs in Somalia, Djibouti's Northwest pastoral zone, and western Rwanda. The rest of Somalia, eastern Ethiopia, Djibouti, most of Kenya outside the cropping highlands, South Sudan outside the eastern, central, and western equatorial zones, most of Darfur and northeastern Sudan, Karamoja in Uganda, eastern Rwanda, and parts of Burundi will remain Stressed (IPC Phase 2) through June.

AREAS OF CONCERN

Sudan

Food security has improved markedly in **Sudan**. 3.5 million people were classified in the Stressed (IPC Phase 2) and Crisis (IPC Phase 3) levels of acute food insecurity in January 2013 as compared to 4.5 million around the same time last year. Generally favorable June to September rains led to a doubling of planted area for sorghum and millet. The excellent October to December millet and sorghum harvest then was a primary driver of improved food security. 2012 to 2013 cereal output is estimated to be about 5.5 million metric tons (MMT), which includes a 1.41 MMT exportable surplus through December 2013 after accounting for domestic cereal needs. Although national average sorghum and millet prices have declined, they remain 41 and 123 percent higher than 2012 and five-year average prices, respectively. The decline in food prices is likely to be moderated by exports to Eritrea and Ethiopia and through informal trade with South Sudan. While

inflationary pressures on food prices have recently improved due to a better macroeconomic outlook, consumer inflation remains the highest in the region.

An estimated 80 percent of the 3.5 million food insecure population is located in the conflict-affected South Kordofan, Blue Nile, and the Darfur States. The disparity in food security outcomes and projections in conflict-affected areas of South Kordofan and Blue Nile States is determined by whether the location is controlled by the Government of Sudan (GoS) or the Sudan People's Liberation Movement-North (SPLM-N). Food security outcomes and outlook projections are consistently worse in SPLM-N controlled areas than in GoS-controlled areas due to better access to trade, more labor opportunities, and better access to humanitarian assistance in GoS-controlled areas.

About 400,000 to 500,000 conflict-affected, food insecure people are in **South Kordofan**, out of which 150,000 to 200,000 are in SPLM-N- controlled areas and 160,000 to 180,000 in GoS-controlled areas. There are an estimated 46,000 refugees in Kadugli from SPLM-N areas, while an additional 10,000 people displaced from rural locations in Kadugli in December, are now in GoS-controlled areas, following fighting between Sudanese Armed Forces (SAF) and SPLM-N. Although the 225,000 metric tons (MT) harvest of cereals in South Kordofan is nine percent higher than last year, it is 47 percent lower than the five-year average. The lower than average production is attributed to the impacts of conflict which caused a reduction in planted area, restricted access to labor, and reduced use of agricultural inputs, especially in SPLM-N-controlled areas. While an estimated 122,000 people in nine GoS-controlled locations have access to humanitarian assistance, limited assistance has reached internally displaced persons (IDPs) in SPLM-N-controlled areas. Substantial food consumption gaps among IDPs and poor host households in SPLM-N-controlled areas persist. These households are in Crisis (IPC Phase 3) and likely to remain in Crisis (IPC Phase 3) from January to at least June. While IDPs in GoS-controlled areas are relatively better off, they still have limited livelihood options even though they are able to meet minimal food consumption needs with assistance. They are classified in Stressed (IPC Phase 2) from January to at least June.

Similar disparities in the food security status of IDPs in GoS- and SPLM-N-controlled areas exist in the **Blue Nile State**. An estimated 100,000 IDPs are residing in SPLM-N-controlled areas and a similar number in GoS-controlled areas. About 112,000 refugees from the conflict-affected areas have moved to Upper Nile State in South Sudan and 35,000 into Gambella Region in Ethiopia. The 244,000 MT cereal harvest derived predominantly from GoS-controlled areas was 14 percent higher than last year's harvest and close to the five-year average. Access to food in SPLM-N-controlled areas is limited to informal cross-border imports from Ethiopia and South Sudan and food prices are at least 10 times higher than in GoS-controlled areas. There is more limited access to food, production inputs, labor opportunities, and humanitarian assistance in SPLM-N-controlled areas. Consequently, IDPs in SPLM-N-controlled areas are in Crisis (IPC Phase 3) and those in GoS-controlled areas are Stressed (IPC Phase 2). This classification is likely to persist through June 2013.

Food production in **the North, South, and West Darfur States** in 2013 was markedly more than in 2012, and food prices have declined and are now below their 2012 levels. However, the security situation is increasingly precarious. In North Darfur State the 150,000 MT harvest is 65 percent higher than average and 380 percent higher than 2012 production. Similarly, in West Darfur, the 680,000 MT cereal harvest is 200 percent higher than average and 580 percent higher than last's year production. Although the 460,000 MT harvest in South Darfur is 47 percent higher than last year and comparable to the five-year average, a shift from cereal production to groundnuts reduced overall cereal output. More groundnuts were planted due to the fact that livestock are less likely to consume them and because high producer prices in 2012 were an additional incentive. Despite favorable production, insecurity has heightened in several locations due to continued and renewed conflict. In January, 30,000 people from central Darfur were displaced by conflict between SAF and the Sudan Liberation Army (SLA)-Abdelwahid faction in West and East Jebel Mara. Continued fighting between SAF and Darfur rebel groups and associated militias is constraining access to markets, trade, labor opportunities, and humanitarian assistance among the recently displaced, negating significant food security gains that have accrued from favorable production. An estimated 1.4 million IDPs in camps have limited food access, primarily a 50 percent food ration and are expected to be Stressed (IPC Phase 2) from January to June. Populations residing in conflicted-affected areas and recently displaced people have significant food gaps and limited income-earning options and are faced with Crisis (IPC Phase 3) from January to June. However, IDPs who have resided with and mixed with host populations over several years have sufficient access to food through the outlook period and face Minimal (IPC Phase 1) acute food insecurity.

South Sudan

The 2012 production season was favorable in the **South Sudan**. The 934,000 MT cereal harvest is 40 percent higher than production in 2012 and about six percent higher than the five-year average. Despite the above average harvest nationally there remains a large import gap representing 53 percent of total national cereal requirements. A large proportion of the population is faced with Minimal (IPC Phase 1) acute food insecurity due to household supplies from the harvest. However, insecurity and conflict continue to limit the benefits from favorable production in several areas. The northern areas of the country in Western Bahr El Ghazal, Northern Bahr El Ghazal, Warrap, Unity, and Upper Nile States border Sudan. They are the worst affected by conflict. In December, an estimated 6,000 people in Western Bahr El Ghazal and Upper Nile States were displaced due to attacks from Sudan. Impacts of inter-clan conflict and livestock raiding have also resulted in displacement of at least 5,000 people, disrupted livelihoods, and heightened food insecurity in the northwestern parts of Lakes, Unity, Warrap, Jonglei, and Upper Nile States in January. Crop production was also impacted adversely by flooding, late last year, in Northern Bahr El Ghazal, Jonglei, Unity, and Warrap States. Although many food prices declined between November and December, consumer price inflation was at a 25 percent annual rate in December, primarily due to underlying, unfavorable, macroeconomic conditions.

Overall food production was below average in the **western flood plains** of Northern Bahr El Ghazal, Warrap, and Unity States. However, production was favorable in Aweil County in Northern Bahr El Ghazal State and in Gogrial and Twic Counties in Warrap State. Below average production was attributed to flood damage in low-lying areas of the flood plains, uneven temporal and spatial distribution of rains through the season, and limited access to production inputs. In addition, continued conflict and population displacements in Unity, Lakes, and Warrap States has reduced the capacities of IDPs and the flood-affected to meet their food needs after the loss of productive assets and other severe livelihood disruptions. Although harvests have increased overall supply of cereals and other staples, affected populations are faced with high food prices and limited income sources. Conflict- and flood-affected households are classified in the Stressed (IPC Phase 2) level of acute food security. Food insecurity is likely to deteriorate to Crisis (IPC Phase 3) from March through June, because households are overwhelmingly dependent on markets with rising prices yet have limited purchasing capacities. Access to wage labor is constrained. In addition, an influx of refugees from Sudan is anticipated through the December to April dry season when an upsurge in conflict is anticipated.

Most parts of the **eastern flood plains** are currently in the Stressed (IPC Phase 2) level of acute food insecurity except Pibor and Nyirol Uror Counties in Jonglei which face Crisis (IPC Phase 3) levels of food insecurity. In these counties, flooding displaced households who were unable to cultivate or access labor opportunities in Sudan. In addition, cattle raiding and inter-ethnic reciprocal attacks disrupted livelihoods, and households in the worst-affected areas have limited access to income and food. The food security of flood- and conflicted-affected poor households is anticipated to decline from February through June because of reduced incomes due to high production losses, heightened livestock migration during the lean season which will limit households milk access, and low labor opportunities for households whose production was disrupted. While food security will remain at Stressed (IPC Phase 2) levels in areas that have not been affected by floods and conflict, Crisis (IPC Phase 3) levels of acute food insecurity are anticipated from April to June among poor households in severely affected areas after the harvests are depleted in Jonglei and Upper Nile. Coping strategies, including unusually high sales of livestock, increased movement toward urban centers in search of labor, and greater reliance on fish consumption and sales will increase, as households at Stressed (IPC Phase 2) levels of acute food insecurity seek to avert deterioration to Crisis (IPC Phase 3) levels. An estimated 59,000 **refugees** in Yida, Pariang, and Nyeel in Pariang County in Unity State are expected to remain at the Crisis (IPC Phase 3) level of acute food insecurity from January to June. The growing number of refugees lack basic services and have limited or no income-earning opportunities. However, refugees in Doro, Jamman, Batil, and Gendrassa in Maban County of Upper Nile State have access to food assistance, maintaining them at the Stressed (IPC Phase 2) level of food insecurity, though upheld by food assistance. They are likely to deteriorate to the Crisis (IPC Phase 3) level as the number of refugees increase and as the lean season starts.

Somalia

Results from the **Somalia post-Deyr** seasonal assessments carried out by the FSNAU and FEWS NET in December suggest that current acute food insecurity levels may be upheld from January to June. An estimated 1,346,000 million rural people are at the Stressed (IPC Phase 2), 127,000 in the Crisis (IPC Phase 3), and 108,000 in the Emergency (IPC Phase 4) phases of acute food insecurity. About 341,000 urban people are in the Stressed (IPC Phase 2) and 152,000 in the Crisis (IPC Phase 3)

phases of acute food insecurity. About 43 percent of people in the Crisis (IPC Phase 3) and Emergency (IPC Phase 4) phases are pastoral destitute, 27 percent are agropastoralists, and 26 percent are pastoralists. Nearly 80 percent of the nearly 1.34 million rural people in Stressed (IPC Phase 2) reside in southern Somalia and are only able to meet their food needs by compromising non-food expenditures.

The October to December *Deyr* rains were normal to above normal in many areas of Somalia with the exception poor rains in parts of pastoral areas of Sanag, Sool, north Gedo, and agropastoral areas of Lower Juba, coupled with a dry spell in late November to early December in Hiran and Middle Shabelle Regions. December to January *Hays* rains in Bari Region and Guban pastoral livelihood zone in the Northwest and North

also contributed to overall good vegetation. The *Deyr* harvest was very good – an estimated 143,000 MT of sorghum and maize was produced, 44 percent higher than the 1995 to 2011 (post-war) average (PWA) output. An additional 73,000 MT of cereals was harvested in northwestern agropastoral areas, about 188 percent of the PWA, following good *Gu/Karan* rains. About 50,000 MT of other commodities were produced, including rice, sesame, groundnuts, onions, and watermelons in the cropping and agropastoral areas of Hiran, Bay, Lower and Middle Shabelle, Lower and Middle Juba, and Bakol.

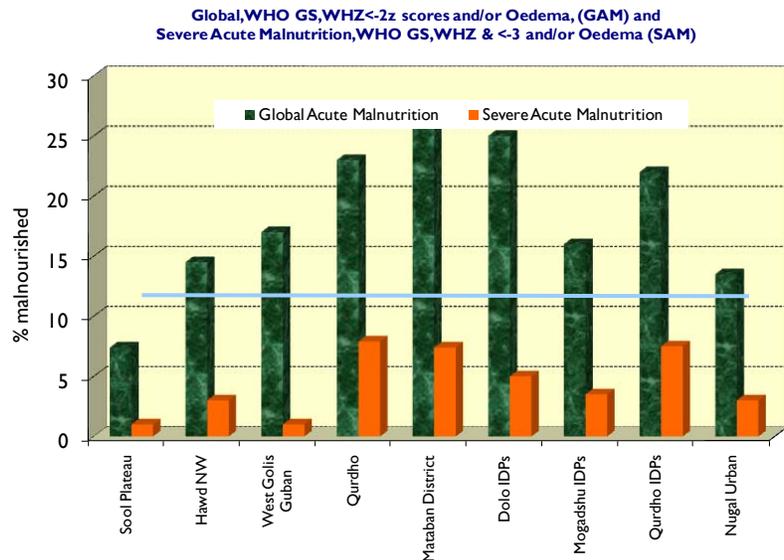
Commodity prices declined in most markets or remained stable, influenced by a now well-functional Mogadishu port and improved security in parts of southern Somalia. Livestock productivity improved substantially and livestock prices were exceptionally high at the end of the *Deyr* rains in December. Livestock conditions were also favorable and births increased across the pastoral and agropastoral livelihood zones, except in western Guban pastoral livelihood zone, the Sool Plateau, and Bari Region in northern Somalia, due to a succession of generally poor rains in addition to livestock losses in previous droughts. However, benefits accruing from improved crop and livestock production were negated by insecurity, predominantly in southern and central Somalia, particularly in Lower and Middle Juba, Lower and Middle Shabelle, Bay, and Bakol.

Although the nutritional status of children under five years old improved markedly from famine levels in 2011, rates remain high in many areas, especially among IDPs (Figure 3). Generally, the northern, southern, and urban areas of the country have *Acceptable* (global acute malnutrition (GAM) rates less than 10 percent) levels of nutrition. Although nutrition rates were generally stable in many areas of the country, rates were expected to deteriorate in Lower and Middle Shabelle and Sool Regions to *Serious* (GAM rates between 10 and 14.9 percent) and to *Critical* (GAM rates between 15 and 19.9 percent) levels in Bay, Hiran, and northern Gedo as the lean season starts and insecurity continues to limit access to markets, labor opportunities, and humanitarian assistance.

Harvested household food stocks are expected to last for one to two months in Lower Juba, five to six months in Lower Shabelle and Bay, and for three to five months in the rest of southern and central cropping areas. However, access to food is limited in the pastoral and agropastoral areas of Guban pastoral livelihood zone in northern Somalia due to poor livestock production, following unfavorable *Hays* rains and parts of the Coastal *Deeh* livelihood zone in central and northern Somalia due to continued low livestock holdings.

Access to food in urban areas has also improved, but income remains limited in the North and in Banadir Region in the South, where most poor urban households have only one income source as compared to the one to three income sources among poor urban households in southern and central Somalia.

Figure 3. Rates of child malnutrition in Somalia, December 2012



Source: [FSNAU](#)

Food security has improved markedly across most of Somalia, most of which is now Stressed (IPC Phase 2) and anticipated to remain so through June. However, food insecurity remains precarious among refugees and poor pastoralists in the Guban pastoral zone, parts of the Coastal Deeh, and parts of the Lower Juba agropastoral livelihood zone which remain in Crisis (IPC Phase 3).

Ethiopia

An estimated 3 million people were faced with Stressed (IPC Phase 2) and Crisis (IPC Phase 3) levels of acute food insecurity in January in Ethiopia. The numbers are anticipated to rise during the outlook period because of below average seasons in 2012 in northern Afar, southern and western Somali, southern Tigray, eastern Oromia, eastern Amhara, and eastern Southern Nations, Nationalities, and Peoples' Region (SNNPR). However, Minimal (IPC Phase 1) acute food insecurity is prevalent in most parts of western and central Ethiopia, principally because of above average production in 2012. The June to September *Kiremt* rains were particularly favorable in the western and central crop-growing areas and the October to January *Meher* harvest was about 19 percent higher than the five-year average. The October to December *Deyr/Hageya* rains were also good in the south and southeastern parts of the country, especially in the areas where the March to May *Gu/Genna* rains were also adequate. Although improvements have occurred in parts of Afar and northern Somalia, significant areas are experiencing severe water shortages and livestock productivity is declining.

Most parts of the southern and **southeastern pastoral and agropastoral areas** received near normal October to December *Deyr* rains. However, parts of Shabelle, Afder, and Liben Zones experienced dry conditions coupled with rapid deterioration of pasture, browse, and water, precipitating early migration of livestock in November, instead of January or February. Apart from those areas, livestock productivity improved in southern Somali and Borena and Guji Zones in Oromia Region. Kidding, lambing, and calving also increased in these areas, though camel abortions in southern Somali are moderating improvements. Livestock prices increased and are above their respective five-year averages, such as in Shabelle Zone, where an average quality local goat was retailing for ETB 1,400 in December 2012 as compared to ETB 900 in December 2011. While sufficient for livestock production, the rains were erratic coupled with flooding in some riverine areas, resulting in an expected poor *Deyr* harvest in February. In parts of southern Somali, Oromia, and SNNPR, crop production volume was below average. The poor harvest is compounded by lower food inflows from East and West Hararghe and high sorghum and millet prices which are 40 to 60 percent higher than average. Many poor households in southern Somali are dependent on relief wheat rations and supplies from the Productive Safety Nets Program (PSNP). Households that had better rains and experienced limited livestock migrations are likely to remain Stressed (IPC Phase 2) from January to June. However, poor and very poor households in parts of Shabelle, Afder, and Liben Zones will remain in Crisis (IPC Phase 3) through March, improving to Stressed (IPC Phase 2) after expected normal March to May *Gu/Genna* rains, which should improve the availability of pasture, browse, and water, enhancing livestock productivity and prices. However, food insecurity is likely to remain at Crisis (IPC Phase 3) levels from January to June for poor and very poor households that also experienced poor June to September and October to December rains in parts of Afder and Liben Zones.

A combination of a poor February to May *Belg* season and an early cessation to the June to September *Kiremt* rains, late planting, and reduced planted area has resulted in below normal harvests in the **major sweet-potato growing zones and dominantly Belg-producing southern Woredas of SNNPR**. Apart from a 40 percent reduction in sweet potato area planted, coffee production had been affected adversely by coffee berry disease (CBD), reducing incomes from coffee and labor opportunities from coffee production. Some slight decline in food prices occurred after harvests in November and December but most of this harvest has already been consumed. Poor households are now increasing firewood collection, petty trade, and labor supply to try to increase food purchases. Most poor household have access to minimally adequate food consumption by compromising non-food needs and face the Stressed (IPC Phase 2) level of acute food insecurity. Food insecurity is likely to worsen after household food stocks are exhausted atypically early. The sweet-potato planted area is low and will not meet household food needs or provide adequate labor opportunities. Food prices are anticipated to rise even more sharply after February, and poor households are likely to increase migration to urban centers in search of alternative sources of income and also switch other remaining expenditures to food. Subsequently, poor and very poor households are expected to be in the Crisis (IPC Phase 3) phase of acute food insecurity from January through June.

Favorable June to September rains in parts of the **eastern, marginal, Meher-producing areas** ensured a near normal harvest. However, rains were erratic and ceased early in lowland areas of Oromia, Tigray, and Amhara Regions, leading to a poor maize and sorghum harvest, crops that account for up to 75 percent of food needs in parts of the lowlands. In

addition, off-season rains in October and November compounded the poor output by destroying some of the harvest. However, livestock conditions and productivity are good except in eastern Tigray and eastern Amhara due to shortages of water and pasture, resulting in early migration of livestock and limiting access to milk and milk products for poor households. Although food prices have slightly declined during the harvest, prices are elevated and are 20 to 30 percent higher than their five-year averages in East and West Hararghe Zones in Oromia Region. Rates of child malnutrition are also rising in the same areas where crops failed, and a high number of children, over 10,000, were admitted to Outreach Therapeutic Programs (OTPs) in 2012. Crisis levels of acute food insecurity are anticipated to persist through the outlook period in East and West Hararghe Zones in eastern Oromia, eastern and southern Tigray, and eastern Amhara, including North and South Wollo Zones, which experienced both poor *Belg* and *Meher* rains this year. Other parts of the eastern marginal *Meher*-producing areas are anticipated to remain under Stressed (IPC Phase 2) levels of acute food insecurity from January to June.

Poor June to September *Karma* rains in eastern and northeastern **Afar Region** contrasted with good rains in the rest of the country in southern and central areas. The June to September *Karan* rains in **northern Somali Region** were also generally near normal, though erratic and ceased early, resulting in severe water shortages in the worst-affected areas in parts of Siti (formerly Shinile) Zone. However, livestock productivity has improved, but birth rates are generally low as herds are still recovering from previous losses from successive droughts. Crops also performed poorly in the agropastoral areas of the northern Somali Region following an early cessation of *Karan* rains and compounded by delayed March to May *Gu* rains. Poor households have also faced delays in obtaining food assistance from the PSNP and emergency humanitarian assistance, keeping prices at elevated levels. Livestock prices have declined because of a combination of reduced demand from the Middle East and poor livestock body conditions. Poor households have low livestock holdings because herds have not been rebuilt sufficiently after losses were incurred during past droughts. For example, camel and goat herds are only 50 and 80 percent respectively, of their 2006 baseline levels, underlining eroding purchasing capacities of poor households in parts of Afar. Siti (formerly Shinile), pastoral areas of Fafan (formerly Jijiga), and most parts of Zones 1, 2, and 4 in Afar Region are faced with Crisis (IPC Phase 3) levels of acute food insecurity through June, attributed to severe water shortages, reduced livestock holdings per household, limited purchasing capacities due to a narrowing of income-earning opportunities, reduced livestock prices, declining milk availability as livestock migrate, and lower terms of trade. The poor households will accelerate depletion of assets in order to meet food needs, further compounding future production prospects. However, those areas of Zones 1, 3 and 5 in Afar Region, which received more favorable *Karma/Karan* rains, will remain Stressed (IPC Phase 2) from January to June, as households are able to obtain minimally adequate food requirements through sale and consumption of milk, livestock, and bush products.

Kenya

An estimated 1.05 million people are in the Stressed (IPC Phase 2) phase of acute food insecurity in **Kenya**, situated predominately in the **marginal agricultural cropping lowlands and pastoral areas of the North, Northwest, Northeast, and East**. Food insecurity for poor households, previously in the Crisis (IPC Phase 3) phase in the southeastern and coastal marginal agricultural cropping lowlands has improved to the Stressed (IPC Phase 2) phase though after a succession of two poor seasons. The more important October to December short rains season performed better than expected. Maize prices have remained high and are 30 to 45 percent above their five-year averages, even at the end of the long rains harvest in the western surplus cropping highlands. Prices could decline further since harvesting is on-going in the short rains-dependent cropping areas of eastern, central, and southeastern Kenya.

The resurgence of rains in late December and early January enhanced production because most of the replanted maize crop has matured although losses of up to 30 percent have occurred in localized areas. However, rains have eased severe water shortages and improved the availability of pasture and browse for livestock in both the cropping lowlands and eastern pastoral districts of Mandera, Wajir, and Isiolo. It is anticipated that food security will remain at the Stressed (IPC Phase 2) level from January to June, attributed principally to increased food supply from the relatively higher elevation areas of the southeast, central, and eastern cropping areas. Short-cycle vegetables will also become readily available from April to June, following the onset of the long rains in late March. However, Stressed (IPC Phase 2) levels of acute food insecurity are likely to remain in all pastoral districts because livestock productivity improved after the resurgence of rains and livestock prices are higher than average. Poor pastoral households are also able to access some milk, meat, and continued humanitarian assistance, sufficient to support minimal food needs and will therefore remain at Stressed (IPC Phase 2) levels from January to June.

Djibouti

An estimated 70,000 poor people are at the Stressed (IPC Phase 2) and Crisis (IPC Phase 3) levels of acute food insecurity in the Northwest and Southeastern Pastoral Border livelihood zones in Djibouti. The impacts of good July to October *Karan/Karma* rains are still evident in the Northwest Pastoral livelihood zone, with increased access to water and pasture, improving the herd sizes. The Southeast Border Pastoral livelihood zone experienced poor October to February *Hays/Dada* rains. Nevertheless, increased competition for resources during the long October to March dry season is anticipated to result in rapid depletion of pasture, browse, and water in the Northwest Pastoral livelihood zone. A poor March to June *Dirac/Sugum* season in the Southeast Pastoral Border livelihood zone is likely to cause further deterioration in food security after two consecutive poor seasons. Poor households in the Southeast are not meeting minimal food consumption needs food because of extensive sharing of relief food among community members, due to the high level of need. Poor households do not have alternative sources of income to livestock production, and they are overwhelmingly dependent on relief food distributions. The households are anticipated to remain in Crisis (IPC Phase 3) from January to June.

However, favorable July to October *Karan/Karma* rains in the Northwest Pastoral livelihood zone have resulted in improved livestock productivity, in addition to continued humanitarian assistance, sustaining minimal food availability, at least, through March. However, water, pasture, and browse are anticipated to rapidly deplete as the March to June dry season intensifies, causing migrating livestock from the Central Pastoral and Southeast Pastoral Roadside livelihood zones to cluster in the Northwest, where dams are still holding water. Food security for poor households in the Northwest Pastoral livelihood zone is expected to deteriorate to Crisis (IPC Phase 3) levels from April through June, as livestock productivity declines. Poor households in the rest of the Central Pastoral and Southeast Pastoral Roadside livelihood zones will remain in the Stressed (IPC Phase 2) phase from January to June, motivated by better access to urban centers for labor opportunities and marketing their livestock and livestock products along with continued humanitarian assistance.

Poor households in the rural areas near Obock town in the Northeast, situated in the Central Pastoral Lowland livelihood zone, are experiencing severe water shortages and critical malnutrition levels. Poor households in Obock are anticipated to remain in Crisis (IPC Phase 3) from January to June. Poor households in Djibouti City continue to face weakened purchasing capacities and are highly indebted. Poor urban households are anticipated to remain in Crisis (IPC Phase 3) levels of acute food insecurity through February, improving to Stressed (IPC Phase 2) levels, from March to June, after replenishing income.

Rwanda

An estimated 80 percent of the national population of Rwanda is faced with Minimal (IPC Phase 1) levels of acute food insecurity. However, poor households in the **Eastern Congo-Nile highland subsistence farming, Eastern semi-arid agropastoral, and western Congo-Nile Crest tea livelihood zones** are faced with Stressed (IPC Phase 2) levels of acute food insecurity after below-average September to November Season A rains. Subsequently, a below normal December to February Season A harvest is anticipated, attributed to a combination of delayed and up to 25 percent below normal rains in those livelihood zones as well as crop diseases, and a reduction in planted area of key staples, such as, maize, beans, and cassava. Food security is anticipated to improve to Minimal (IPC Phase 1) acute food insecurity in February and March due to the ongoing Season A harvests. However, stocks from that harvest are anticipated to be deplete at least one month earlier than usual, by April rather than by May, for poor households because of lower than usual production during Season A, thus starting the main lean season a month earlier in March rather than in April. The return of about 30,000 Rwandan refugees from the Democratic Republic of Congo (DRC), in addition to 41,350 existing refugees from other countries already resident in Eastern Congo-Nile highland subsistence farming livelihood zone, has compounded food insecurity because the labor supply has increased, pushing down wage rates, while demand and prices for food commodities have risen. The outbreak of foot-and-mouth disease (FMD) has also reduced productivity of livestock. A quarantine has been instituted by the Government of Rwanda to restrict the movement of livestock and prevent the spread of FMD, primarily affecting the Eastern Semi-arid Agropastoral livelihood zone. However, this is reducing income from livestock production. The combination of below average harvest, reduced livestock production, limited labor opportunities, and concomitant low wage rates will accentuate and lengthen the April to June lean season, compounding constrained purchasing capacities. Subsequently, food security for poor households will deteriorate to the Stressed (IPC Phase 2) level from March through June.

Uganda

Minimal (IPC Phase 1) acute food insecurity will be prevalent among poor households in most bimodal areas of the country through June, attributed to average to above average November to January harvests and favorable livestock productivity over the past year and expected to continue into 2013. Although food prices are above their five-year average levels, ongoing harvests are moderating prices which are likely to remain at high levels because of above normal levels of demand for exports to Kenya, the DRC, and Rwanda. However, poor **agropastoral households in most of Karamoja** (northern Nakapiripirit, Napak, Moroto, Kotido, and Kaabong Districts) are faced with Stressed (IPC Phase 2) levels of acute food insecurity. Food stocks depleted two to three months early in January instead of March or April, after the below average October to December harvest, attributed to crop losses due to water logging and an outbreak of a fungal disease on sorghum. While livestock productivity is near average levels, milk availability to households is seasonally declining as pregnant livestock are nearing the end of their gestation periods. While production will increase again following births over the next two months, in the meantime, milk availability for human consumption will be more limited. The onset of the dry season in January in Karamoja has also resulted in a decline in water available to poor households. Hygiene levels have declined, compromising the utilization of food. The poor and very poor households are anticipated to finance food purchases to make up for their already exhausted stocks through typical coping strategies, including increased sales of forestry products, increased livestock sales, and increased consumption of wild foods. Poor and very poor households in Karamoja are expected to remain at the Stressed (IPC Phase 2) levels of acute food insecurity from January to June because no significant crop harvest is anticipated until October. However, improved livestock productivity, primarily an increase in milk production by June, will improve household food insecurity. In addition, food disbursements through food-for-work (FFW), cash-for-work (CFW), and food assistance programs are also preventing current food security outcomes from deteriorating.

Tanzania

Most poor households in Tanzania face Minimal (IPC Phase 1) acute food insecurity, except those residing in the **bimodal-to-unimodal transition areas**. Poor households in the transition areas and some central areas experienced below normal *Masika* and *Msimu* rains in 2012 in addition to poor *Vuli* rains in November and December. Below average 2012 *Masika*, *Msimu*, and *Vuli* harvests have culminated in Stressed (IPC Phase 2) levels of acute food insecurity, anticipated to persist in the bimodal-to-unimodal transition areas and some central areas of the country until the beginning of the *Msimu* harvest in April. Overall national food prices are higher than average, in part due to below average production, increased demand for exports from Kenya, DRC, Rwanda, and Burundi, and high transport costs. For example, maize prices are 54 to 120 percent higher than their five-year averages. Market supplies are tightened further by poor banana and cassava production due to the spread of banana bacterial wilt (BBW) and cassava mosaic virus (CMV) disease, respectively. Poor households in the transition areas are engaging in casual labor to supplement their purchasing capacities resulting from poor local production and overall higher than average food prices during the lean season expected to last until March. However, food security is expected to improve to Minimal (IPC Phase 1) acute food insecurity from April through June for poor households in transition and central areas when household food stocks are replenished during the *Msimu* harvest.

Burundi

Most poor households in Burundi face Minimal (IPC Phase 1) acute food insecurity, with the exception of **refugees in camps, returnees, and poor households in lowland areas**, all of whom are classified in the Stressed (IPC Phase 2) phase of acute food insecurity. Season A harvests are ongoing but prices remain higher than average, although a temporary price decline is anticipated in February and March. Crop output will likely be lowered by crop damage, an early end to the rainy season in December, and crop diseases including cassava mosaic virus (CMV), cassava brown streak virus disease (CBSD), and banana bacterial wilt (BBW), particularly in the Northwest and Southeast. Worryingly, crop losses on up to 60 percent of the 8,000 hectares planted are expected in the Northwest. Food prices are 15 to 50 percent above their five-year averages, indicative of below average production and depleted household food stocks. Areas most impacted by the poor season including the warm lowlands and the *plateaux humides* livelihood zone. Though poor households in these areas are currently in the Minimal (IPC Phase 1) acute food insecurity phase, they are expected to decline to the Stressed (IPC Phase 2) phase from April through June, after the harvest is depleted. An estimated 33,819 returnees from Mtabila refugee camp in Tanzania and other refugees residing in Burundi have limited income generating opportunities, having lost their previous

livelihoods, and are expected to remain in the Stressed (IPC Phase 2) phase of food insecurity until they are able to rebuild their livelihoods.

EVENTS THAT MIGHT CHANGE THE OUTLOOK

Area	Event	Impact on food security outcomes
Kenya	Post-election crisis in urban and rural areas	Conflict could constrain access to local and regional markets, labor opportunities, and activities associated with long rains production. These factors would lead to a decline in household food security among affected populations.
Southern Sudan, northern South Sudan, and southern and central Somalia	Less than expected conflict and civil insecurity	Increased access to markets, trade, humanitarian assistance, cropping land, labor opportunities, and grazing resources would lead to improvements in food security outcomes
Areas that are dependent on the March to May rains, including Somalia, southern and eastern Ethiopia, Kenya, and bi-modal areas of Uganda, Rwanda, Tanzania, and Burundi	Higher than normal rainfall	<ul style="list-style-type: none"> • Consolidation of recovery and improved food security outcomes in Somalia, Kenya, and parts of Ethiopia. • Flooding in flood prone areas including the Shabelle flood plains in Somalia and Ethiopia, the Lake Victoria and River Tana basins in Kenya, Uganda, and Tanzania. • Likely flooding in low lying areas of Rwanda, Uganda, and Burundi
March to May rains-receiving areas including Somalia, southern and eastern Ethiopia, and Kenya	Delayed start to the March to May long rains	Rapid depletion of pasture, browse, and water due to higher than normal atmospheric temperatures, resulting in accelerated decline in livestock productivity, prices, household access to milk and livestock products amidst heightened conflict. Food security outcomes would be worse than projected, especially among poor, pastoral households.

ABOUT SCENARIO DEVELOPMENT

To project food security outcomes over a six-month period, FEWS NET develops a set of assumptions about likely events, their effects, and the probable responses of various actors. FEWS NET analyzes those assumptions in the context of current conditions and local livelihoods to develop scenarios estimating food security outcomes. Typically, FEWS NET reports the most likely scenario.