

*Food security improvements driven by above-average long rains and low staple food prices*

**ABOUT THIS UPDATE**

FEWS NET Food Security Outlook Updates in September 2018 have an extended outlook beyond the standard projection period. The end of this report includes a discussion of most-likely outcomes through the end of the next lean season for Kenya. Reporting for this country may follow a non-standard schedule in the coming months. Check back regularly for [new analysis](#), [subscribe for report updates](#), or follow us on [social media](#).

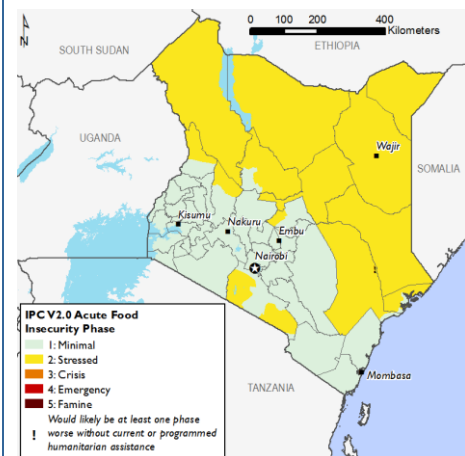
**KEY MESSAGES**

- Countrywide, the historically above-average 2018 March to May long rains have continued to drive food security improvements. The marginal areas are currently supported by available harvests and are in Minimal (IPC Phase 1), and food availability will increase even further, beginning in October, with harvesting from the high and medium-producing areas. Despite significantly improved livestock productivity and above-average terms-of-trade in pastoral areas, Stressed (IPC Phase 2) outcomes are expected to persist through January 2019.
- With an average to above-average forecast for the October to December short rains, livelihood recovery from the 2016/17 drought is expected to continue in pastoral areas. Improved rangeland resources are expected to sustain above-average livestock body conditions, increasing household income. In the marginal areas, despite a mixed long rains crop performance, above-average household food stocks across the zone and below-average staple food prices are supporting household food access. However, parts of Makueni and Lamu and households in Embu (Mbeere) are likely to face Stressed (IPC Phase 2) outcomes through January 2019 due to below-average production.
- While the nutrition situation has improved significantly across Kenya compared to February 2018, with better food access and consumption, findings from the recent Long Rains Assessment (LRA) indicate that the prevalence of global acute malnutrition (GAM) remains Critical (15-29.9 percent) in Turkana, Samburu, Mandera, Baringo (East Pokot), and Marsabit (North Horr). While these levels are concerning, they are in part attributed to non-food security factors, such as poor childcare feeding practices and access to health facilities and are projected to remain stable through the outlook period.

**CURRENT SITUATION**

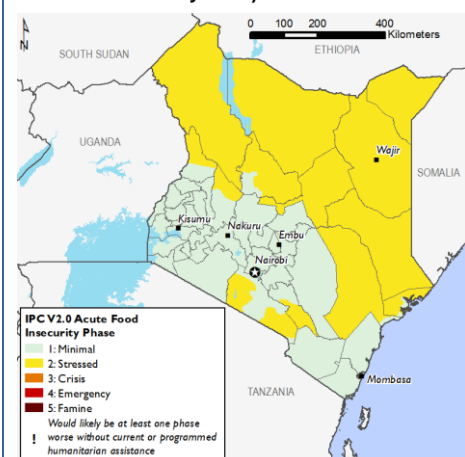
**National:** The recently concluded 2018 LRA carried out by the Kenya Food Security Steering group, which FEWS NET participated in, found that the food security situation has improved significantly across the country, particularly in

**Current food security outcomes, 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.

the pastoral counties. Generally, income sources in pastoral areas are above normal, facilitating needed market food purchases, as livestock prices remain above average, sustained by the available forage and water resources. In the marginal agricultural areas, income from crop sales remains below normal due to below-average staple food prices. However, this is offset by higher income from livestock sales due to good livestock body conditions and above-average casual labor opportunities from harvesting of the long rains crop and land preparation for the expected average to above-average short rains cropping season.

**Seasonal progress:** FEWS NET estimates the national long rains season maize production to be around 34.6 million 90 kg bags, or 3.11 MMT, which is 15 percent above the long-term average. The increase in production is largely attributed to enhanced rainfall and relatively lower levels of Fall Armyworm infestations. While this marks an increase from 2017/2018, the production could have been even higher, but total maize planted in the high and medium rainfall areas was lower due to the high level of carryover stocks from the 2017/2018 production season, and some crops were affected by soil leaching and flooding.

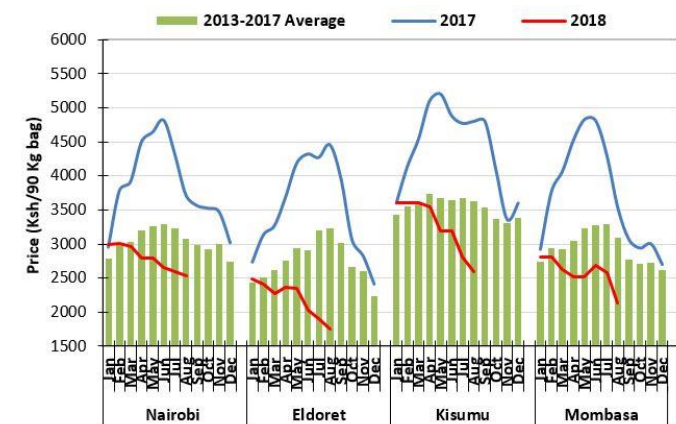
**Markets and Trade:** Across the urban reference markets, wholesale maize prices remained 18 to 27 percent below average between July and August, due to available domestic stock levels and consistent cross-border imports from Uganda and Tanzania. As a result, these lower prices are facilitating better household food access. In Eldoret,

August prices were lowest at 42 percent below average due to expectations of slightly above-average local production, high carryover stocks from 2017/2018 for farmers and traders, and continued cross-border imports. Dry bean prices were mixed. They remained within average in Eldoret due to available carryover stocks, were seven percent above average in Nairobi due to low local supplies, and were 11 to 19 percent below average in Kisumu and Mombasa, respectively, due to cross-border imports from Uganda and Tanzania.

**Pastoral areas:** At the height of the dry season, almost all the pastoral counties still atypically have good pasture and browse conditions, following the above-average March to May long rains season. However, parts of Turkana, Garissa, Laikipia, Samburu, and Wajir have some areas where pasture is not above average but ranges from good to fair. With atypically better forage and water resources, livestock body conditions are good to above-average, and pastoralists' trekking distances to move their livestock from water sources to grazing areas are currently below average, at two to six kilometers compared to the usual five to fifteen kilometers. While livestock productivity has significantly improved, especially milk production, it largely remains below average across most pastoral areas, ranging from one to three liters daily, compared to a normal of three to five, which is primarily produced by small livestock. However, milk production remains above average in Turkana, Marsabit, and Mandera. As would be expected, milk consumption across these areas reflects the trends in milk production. In addition, food availability and access is generally facilitated by lower staple food prices and above-average terms-of-trade. For example, August maize prices were 21 to 24 percent below average in Turkana and Marsabit due to increased local and cross-border imports from Uganda and Ethiopia. Maize prices remained within average in Wajir and Mandera due to preferences for substitutes but were 10 and 40 percent above average in Garissa and Isiolo, respectively, following low household stocks and poor long rains harvests in agropastoral areas. Goat prices were above average across all pastoral markets, most markedly in Mandera, Turkana, and Marsabit, where they were 38 to 50 percent above average in August due to very good livestock body conditions.

According to the World Food Programme (WFP) Food Security Outcome Monitoring (FSOM) data used as part of the LRA, food consumption has significantly improved, with 97 percent of households in Isiolo and 88 percent in Mandera and Wajir with an Acceptable Food Consumption Score (FCS). According to June and July 2018 SMART nutrition surveys, 86 percent of households in Garissa, 70 to 71 percent in Turkana and Marsabit, 68 percent in Samburu, and 63 percent in West Pokot had Acceptable FCS. In addition to the aforementioned improvements, continuous support response programs through the blanket supplementary feeding program (BSFP), general food distributions (GFD), Hunger Safety Net Programme (HSNP),

**Figure 1.** Maize price trends in major urban markets



Source: Kenyan Ministry of Agriculture

other cash transfer programs, and interventions have positively improved health and nutrition outcomes, following the 2016/17 drought. These improvements are reflected in some of the recent SMART surveys. For example, in Garissa County the GAM prevalence has fallen to 13.7 percent (11.1-16.8 95% C.I.) from Critical levels; in Marsabit County, GAM fell to 12.4 percent (10.2-15.0 95% C.I.) compared to 16.9 percent in July 2017; and in West Pokot County, the overall GAM prevalence was 11% (8.9-13.5 95% C.I.), which was a significant decrease from 20.4 percent in 2017. However, there are still areas with concerning Critical GAM levels, including Turkana, Samburu, Mandera, Baringo (East Pokot) counties, and North Horr Sub-County of Marsabit. However, some of this is driven in part by chronic and non-food related factors, such as poor child care feeding practices, morbidity, and poverty, evidenced by high stunting rates. Despite the food security improvements, due to previous livestock losses and affected livelihoods from the 2016/17 drought, many poor households are able to meet their minimum food needs but cannot afford their essential non-food needs, leading to the Stressed (IPC Phase 2) classification for Kenya's pastoral areas.

**Marginal agricultural areas:** Food availability has improved, following the recent long rains season crop harvests of maize, cowpeas, and green grams, and to a lesser extent, beans. Maize production was upwards of 20 percent above average in Kitui, Tharaka, Kwale, and Taita Taveta but below average in the rest of the counties, particularly in parts of Makeni. Cowpeas and green grams registered a mixed performance across the marginal agricultural areas. Production was more than 110 percent of the long-term average in Kitui, Meru North, Kwale, and Taita Taveta, but it was below average in the other counties. The lower production levels were attributed to the fact that there was late planting, following the initial poor seasonal forecast; losses from crop diseases and pests, and the fact that the long rains season is not the main period for maize production in these areas. However, Kitui and Meru registered exceptionally high green gram and cowpeas production due to an increase in acreage, driven by favorable rainfall, and county government-led initiatives that involved the provision of certified seeds and assurances of a ready market for green grams in both counties. Between July and August, maize prices were within averages in Kilifi due to poor harvests but stabilized by cross-border imports from Tanzania, and in parts of the southeast of the country, were 14 to 26 percent below average due to the ongoing average harvests and available substitutes, such as sorghum and millet. Dry bean prices were 21 percent below average in Nyeri due to above-average harvests but were within five-year averages in Makeni, Kilifi, and Taita Taveta, stabilized by imports following below-average harvests, but in Kitui, were 15 percent above average as a result of poor production. According to the WFP FSOM data, food consumption has improved across the marginal agricultural areas. In the coastal zones, 54 percent of households now have Acceptable FCS compared to 40 percent in February 2018, while there are currently 93 percent of households in the southeastern zones, up from 78 percent. With available food stocks and relatively low staple food prices, the marginal areas have experienced increased food security and are in Minimal (IPC Phase 1), with the exception of the majority of Lamu, where Stressed (IPC Phase 2) outcomes persist.

## UPDATED ASSUMPTIONS

The assumptions used to develop FEWS NET's most likely scenario for the [Kenya Food Security Outlook for June 2018 to January 2019](#) remain unchanged except the following assumptions:

- According to NOAA and USGS, given the most likely scenario is for a weak El Niño, the forecast indicates a timely onset and average to above-average cumulative rainfall for the **October to December short rains** over eastern and western Kenya.
- Based on an analysis of current prices and drivers, FEWS NET's integrated price projections show that wholesale **staple food prices** in the urban market of Nairobi, a reference for the entire country, are likely to remain below 2017 levels and the five-year average. Wholesale maize prices between September 2018 and January 2019 are expected to range from 23 to 26 percent below average given the expected favorable unimodal harvest. Prices are expected to range from KES 23 to 25 per kilogram. Due to below-average bean harvests due to rot and fungus caused by excess moisture, dry bean prices are expected to range between KES 70 to 75 per kilogram through January 2019. Prices are expected to be relatively stable and range between seven to eight percent above the five-year average between September 2018 and January 2019.
- From an analysis of trends of **acute malnutrition** across the country, including the most recent SMART surveys, high but typical Critical GAM levels (15-29.9 percent) are likely to be sustained from September 2018 to January 2019 in Mandera, Turkana, Samburu, and parts of Baringo (East Pokot), and Marsabit (North Horr) counties, primarily driven by non-food security related factors, including poor childcare feeding practices and lack of suitable access to health

facilities. Typical Serious GAM levels (10-14.9 percent) are anticipated in Wajir, Garissa, Isiolo, Laikipia, Tana River, and other parts of Marsabit (Laisamis).

### **MOST LIKELY PROJECTED OUTCOMES THROUGH MARCH 2019**

#### *Projected outcomes through January 2019*

**In pastoral areas**, continued lambing and kidding is set to increase milk production and consumption, stabilizing the overall nutrition situation. The forecasted October to December short rains are expected to fully regenerate forage and recharge water sources, further improving livestock productivity and market prices from late October. Calving is expected to occur from early November, restoring milk production to at least average levels, especially in Isiolo, Garissa, and Wajir counties. With expected above-average crop production in the unimodal areas from October, staple crop prices are expected to remain below average, maintaining favorable terms-of-trade favorable. With above-average household income, food access is expected to increase. Household food and milk consumption is likely to improve further from November, driving recovery and more households will improve to None (IPC Phase 1). However, the majority of the poorest households are likely to take longer than earlier anticipated to recover due to the severe livelihood impacts from the previous poor seasons, including loss of their livestock, ongoing livestock diseases, limiting productivity; as well as by the persistent poverty levels that continue to hinder the pace of improvement, maintaining the pastoral areas in Stressed (IPC Phase 2) through January 2019.

**In the marginal agricultural areas**, for poor households in areas with below-average production, like Makueni, Lamu, and Embu (Mbeere), food stocks will likely be depleted by October. As a result, poor households will increasingly rely on coping strategies, such as charcoal sales and remittances, and are likely to be Stressed (IPC Phase 2) through early November. However, in the rest of the areas, likely above-average agricultural crop production activities are expected to continue through October, providing above-average income to households as they seek to maximize on their main production season. From October, household food availability and consumption will improve with increased household purchasing power and below-average staple food prices, with supplies from the unimodal harvest, and households are expected to reduce the application of both consumption and livelihood coping strategies. Household food stocks will dwindle in December but will likely be mitigated by substantial short cycle crop harvests across most of the areas that will increase food consumption and dietary diversity. Better forage from the short rains will likely improve livestock body conditions and milk consumption, resulting in a further decrease in malnutrition in children under five years of age. As a result, more poor households are expected to improve to None (IPC Phase 1) in January 2019, and at the area level, Minimal (IPC Phase 1) outcomes are expected to persist, except in parts of Makueni and Lamu.

#### *Projected outcomes through the end of the next pastoral lean season (through March 2019)*

The period of February through March is typically a seasonally dry period for pastoral areas. Forage and water resources are expected to be above average during this period, following the short rains, driving further improvements. As a result, there is likely to be less-than-normal levels of human-wildlife and resource-based conflicts. The onset of the lean season is likely to be less severe for pastoralists as rangeland resources last longer than usual. Pastoralists are expected to keep their livestock in wet season areas for an extended period of time, providing milk and income to households at above-average levels. Livestock body conditions, even though seasonally declining, are expected to be good and generally above-average. With livestock fetching above-average prices in the market, this is expected to lead to a high livestock-to-grain ratio, increasing household purchasing power and food access. Harvesting of the above-average long rains season crop from the unimodal areas and the likely average to above-average short rains crop from the marginal areas, in February, is likely to provide an adequate supply of staple food crops to the markets, stabilizing them at depressed levels. The food security situation is expected to remain stable and Stressed (IPC Phase 2) area outcomes are expected.

In the marginal areas, the short rains harvest, which is the area's main harvest, will provide improved food availability at the household level and increased staple food supplies to the markets. The harvesting activities will also provide wage labor income-earning opportunities, increasing household income and purchasing power, leading to better food access. Food consumption and dietary diversity are expected to increase from February through March, improving food security, and the marginal areas and the previously Stressed (IPC Phase 2) areas in Makueni and Lamu are expected to be in Minimal (IPC Phase 1). The end of the pastoral lean season will then be marked by the beginning of the long rains season in March, with forecasts indicating average cumulative rainfall; however, there is some uncertainty in this projection given the current weak El Niño forecast. In addition, the next unimodal rainy season (February to August 2019) in western areas is forecast for average cumulative rainfall.