

KEY MESSAGES

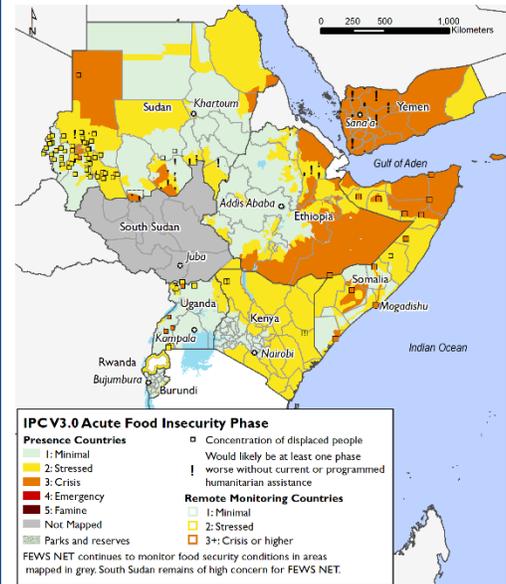
- Protracted conflict, long-term macroeconomic challenges, the economic impacts of COVID-19, weather shocks, and desert locust are causing deterioration in acute food security outcomes in much of the region. Compounding the impact of other shocks, COVID-19 movement restrictions have disrupted demand for labor, export commodities, and services, constrained physical access to income sources, slowed cross-border trade flows, and reduced remittances. Multiple shocks are jointly leading to below-normal household income, higher food and seed prices, and reduced household purchasing power. Crisis (IPC Phase 3) or worse outcomes and high food assistance needs will persist into 2021.
- South Sudan continues to experience one of the worst food insecurity emergencies globally. Urgent humanitarian food assistance is needed to save lives. Severe outcomes are likely through much of 2021 in Jonglei, Warrap, northern Bahr el Ghazal, Upper Nile, Lakes, and Unity, and southern Jonglei is of highest concern.

OUTLOOK BY COUNTRY

Burundi

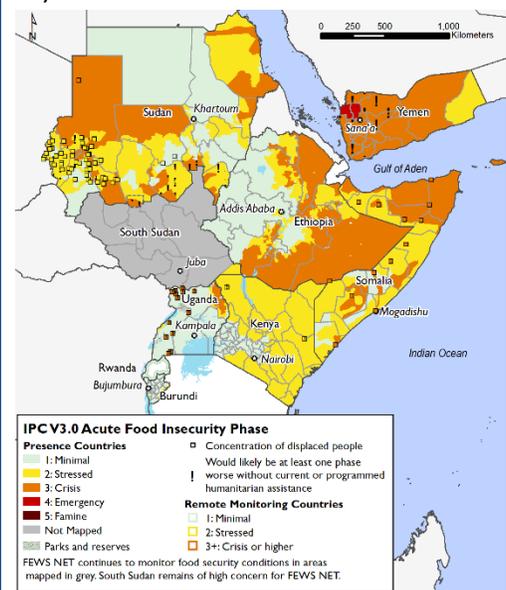
- To mitigate the spread of COVID-19, borders remain closed to the movement of people, reducing, in effect, cross-border income earning opportunities and imported food supply. This, along with above-average staple food prices, is increasing the severity of the October to December lean period for poor and very poor households in Eastern Lowlands and Imbo Plains livelihood zones. In these livelihood zones, Stressed (IPC Phase 2) outcomes are expected through the outlook period.
- NOAA, USGS, and ICPAC forecast that the October to December short rains will likely be near-average nationally (90-110 percent), with localized areas of slightly below-average rainfall (76-90 percent). The rains typically start in mid-September, but the start was delayed until the end of October this year and so far below-average rainfall has been reported in low altitude areas, particularly the Eastern Lowlands livelihood zone. The late start of the short rains in the third week of October is delaying 2021 Season A sowing by more than one month.
- At least 20,000 returnees who arrived from Tanzania and Rwanda in March through August were unable to cultivate 2020 Season B crops and have exhausted the three-month humanitarian assistance they receive upon arrival. Most returnees are located in the Eastern Lowlands livelihood zone. Without their own agricultural production and with limited access to income sources, it is expected that they will experience Stressed (IPC Phase 2) outcomes throughout the outlook period. IDPs in the Imbo Plains, most of whom are displaced by flooding and are negatively affected by COVID-19 border restrictions, have reduced from 50,000 to 25,000 since the start of the dry season. It is anticipated that these remaining IDPs will face Stressed (IPC Phase 2) outcomes throughout the

Projected food security outcomes, October 2020 to January 2021



Source: FEWS NET

Projected food security outcomes, February to May 2021



Source: FEWS NET

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

outlook period. Among the 81,000 Congolese refugees hosted in Burundi, 50,000 benefit from humanitarian assistance and are experiencing None! (IPC Phase 1!) outcomes. The other 31,000 refugees living in urban areas and are likely in Stressed (IPC Phase 2).

For more information, see the [Burundi Food Security Outlook for October 2020 to May 2021](#).

Ethiopia

- The start of the *meher* harvest is improving food access in many crop-dependent areas and Minimal (IPC Phase 1) outcomes are present. In some areas of Afar, SNNPR, Gambella, where flooding and landslides destroyed crops, households are experiencing Stressed! (IPC Phase 2!) outcomes as humanitarian food assistance is improving food access. In southern, eastern, and some northern areas of the country, Crisis (IPC Phase 3) outcomes and Stressed (IPC Phase 2) outcomes are present. This is due to atypically high reliance on markets as desert locusts and flooding resulted in crop losses. Moreover, households in these areas are expected to have continued below-average purchasing power due to continued high food prices and the weak labor market.
- Generally, continued high inflation, the prolonged impact of the COVID-19 pandemic, and the negative impacts of flooding and desert locusts are expected to continue to negatively affect food access from own crops, livestock production, and markets. Therefore, most poor and very poor households in the eastern half of the country will most likely continue facing Crisis (IPC Phase 3) outcomes through May 2021. These outcomes are likely to persist beyond the projection period due to the forecast for consecutive below-average rainfall seasons in southern and southeastern pastoral areas.
- The start of the *deyr/hagaya* October to December rainfall season was timely in many areas; however, rainfall was at least 10-days late across some areas. In the later part of October, rainfall was established resulting in average to above-average cumulative rainfall across many southern and southeastern pastoral areas. There are some areas with localized deficits, with the largest deficits observed in border areas of Somali/Oromia. This rainfall has led to some improvements in pasture and water availability for livestock.
- Beginning in June 2020, high levels of desert locust breeding, and hatching occurred in northwestern Afar and bordering areas of Amhara and Tigray. Furthermore, swarms migrated from Yemen and Somalia into northeastern and southeastern areas. Unlike the 2019 *meher* season, where desert locusts arrived after the harvest was mostly complete, this year, desert locusts are present as *meher* crops are maturing. This, coupled with the increased scale of the upsurge, has resulted in large-scale crop losses. In pastoral areas, particularly in Dire Dawa, northern Somali and agropastoral areas of eastern Oromia, desert locusts consumed pasture, resulting in pasture losses between September to mid-October.
- Favorable *Kiremt* rainfall facilitated crop development; however, heavy rainfall in the latter half of the season resulted in severe flooding in parts of southern Afar, eastern Amhara, eastern and central Oromia, including Dire Dawa, northern and southern Somali, along with Rift Valley areas of SNNPR regions. This resulted in the damage and loss of crops, waterlogging of pasture and cropping areas, livestock deaths, and damaged infrastructure. According to NDRMC, flooding affected about 1.1 million people, and more than 342,000 people were displaced due to flooding.

For more information, see the Ethiopia [Food Security Outlook for October 2020 to May 2021](#).

Kenya

- In the pastoral areas, Stressed (IPC Phase 2) outcomes through the scenario period will persist with the worst affected households likely in Crisis (IPC Phase 3) due to below-average herd sizes, limited assets, low income-earning opportunities, and constrained livelihood activities impacting market access. The forecast below-average 2020 short rains and 2021 long rains are expected to lead to short-lived pasture and water regeneration, and gradual declines in livestock body conditions and production, limiting household access to food and income.
- In the marginal agricultural areas, land preparation and planting activities in anticipation of the October to December short rains are providing average income to households. Below-average short and long rains are expected to drive below-average harvests and associated income earning activities, and households unable to improve their food stocks will become market dependent. Due to low income and higher-priced commodities impacting household purchasing power, Stressed (IPC Phase 2) outcomes are likely through May 2021.
- The Ministry of Health attributes the increase of over 10,000 confirmed COVID-19 cases since the beginning of October to increased testing following the receipt of 150,000 testing kits from donors. COVID-19 control measures such as the national 11.00 pm to 4.00 am curfew, containment of Dadaab and Kakuma refugee camps, mandatory testing at borders

for truck-drivers, and enforcement of social distancing rules remain in place. Education institutions partially reopened across the country on October 12 with final year students in primary, secondary, and tertiary institutions reporting back to school.

- Following 130 percent of normal rainfall from February to September, flooding from the Lake Turkana and along the Turkwel River basins has displaced around 6,500 households in Kerio, Kalokol, Kang' arotha Lake zone wards in Turkana County and Loiyangalani ward in Marsabit County. The submergence of fishing equipment, boats, and homes located along Lake Turkana's shores is driving Crisis (IPC Phase 3) outcomes in the Fishing Livelihood Zone. The Turkwel Dam is currently at 92 percent capacity, and there remains a flood risk to downstream households located along River Turkwel.
- Staple food prices in September were mixed and continue to be affected by COVID-19 related restrictions. Maize prices were mostly average to 12 percent below the five-year averages except in Kwale, Garissa, and Mandera markets where maize prices were 17-22 percent above average due to below-average production and constrained cross-border supply. Dry bean prices remained 9-24 percent above the five-year averages across all markets except in Taita Taveta, Nyeri, and Kisumu, where there was adequate supply from a combination of local harvests, available substitutes, and cross-border supplies.

For more information, see the Kenya [Food Security Outlook for October 2020 to May 2021](#).

Somalia

- Acute food insecurity is expected to remain high in Somalia through May 2021, driven by the varying impacts of localized floods and below-average rainfall, a worsening desert locust infestation in central and parts of southern Somalia, and the economic contraction linked to the COVID-19 pandemic. In late 2020, the population facing food consumption gaps indicative of Crisis (IPC Phase 3) or worse outcomes is likely to reach 2.1 million. In early to mid-2021, the acutely food insecure population is likely to rise over 2.5 million due to the impact of consecutive, below-average rainfall seasons on crop and livestock production. Sustained humanitarian food assistance is required to prevent Crisis (IPC Phase 3) or worse outcomes and protect livelihoods.
- The October to December 2020 *deyr* rainfall season is performing better than previously forecast in central and parts of southern Somalia, but cumulative rainfall in the North and much of the South is below 55 percent of the 30-year average. The rains will mitigate crop losses in southern agropastoral areas and benefit livestock production in south-central pastoral areas, but the likelihood of a third consecutive season of flooding will erode crop production in riverine areas. In the north, livestock production conditions are still favorable but pasture and water will likely become scarce during the January to March 2021 *jilaal* dry season.
- Desert locust hatching and band formation are widespread in central Somalia, and swarms are present in Hiiraan, Bay, Bakool, and Middle and Lower Shabelle regions. There are reports of significant damage to germinating crops in these areas, including *Cowpea Belt Agropastoral* and *Bay Bakool Low Potential* livelihood zones. Due to the presence of swarms and reports of breeding in the South at this stage of crop development, as well as the likelihood of erratic rainfall at the end of the *deyr* season, crop and pasture losses from desert locust will be higher than last year. On the other hand, aerial control operations in the Northwest are reducing local swarms. Pasture losses in the North remain localized, permitting opportunities for livestock migration.
- Urban and displaced households across Somalia, as well as pastoral households in *East Golis Pastoral* livelihood zone who heavily rely on frankincense exports, are most affected by the economic contraction linked to the impacts of the COVID-19 pandemic. The pandemic led to a temporary decline in staple food imports and livestock and frankincense exports, curtailed remittances to households and small and medium businesses, and increased unemployment in urban areas. According to the latest World Bank economic forecast, Somalia's economy is expected to rebound in 2021 due to a dollarized economy, low fuel prices, recovery in remittances, and fiscal reforms. However, poor households with limited coping capacity and high vulnerability will likely continue to struggle to meet their minimum food and non-food needs.
- FEWS NET's analysis of historical rainfall performance indicates that waning La Niña conditions will most likely result in below-average rainfall during the April to June 2021 *gu* season. Due to the cumulative impacts of multiple weather shocks and persistent desert locust infestation, coupled with the ongoing recovery from the 2020 economic contraction, food assistance needs are expected to rise through at least May 2021. Crisis (IPC Phase 3) outcomes are expected in many northern pastoral areas, riverine areas, and several agropastoral areas, as well as in most urban areas and IDP settlements. On the household level, it is likely that some worst-affected households will be in Emergency (IPC Phase 4).

For more information, see the Somalia [Food Security Outlook for October 2020 to May 2021](#).

Sudan

- Very high staple food prices from significant macroeconomic difficulties and displacement due to flooding are contributing to higher than normal emergency food assistance needs in Sudan during the ongoing 2020/21 harvest season. These needs are expected to persist into at least May 2021, particularly as the lean season approaches in agricultural and agropastoral areas. Between October 2020 and May 2021, most areas of Sudan will face Minimal (IPC Phase 1) or Stressed (IPC Phase 2) acute food insecurity, although parts of Jebel Marra, South Kordofan, Red Sea, Kassala, North Kordofan, and North Darfur will be in Crisis (IPC Phase 3).
- On October 27, Sudan's government removed all fuel subsidies, which led to an initial 400 percent increase in fuel prices, driving an over 100 percent increase in transportation costs. The prices of food and non-food items have significantly increased in response. Many of the market impacts are yet to be seen, although this is likely to drive even higher prices than previously anticipated.
- The above-normal June to September 2020 rains caused widespread flooding and delayed planting in many parts of the country. However, the above-average rainfall did drive the establishment of crops in parts of the rainfed and irrigated agricultural sectors, contributing to favorable pasture regeneration and improved water availability across main grazing areas. Currently, crops are in the vegetative, flowering, and early maturing stages. Agricultural harvests starting in late November are expected to be average at the national level, which will drive food security improvements; however, relatively notable crop losses are expected in Gadaref, Sennar, and the Blue Nile due to expected delays in harvest from flooding and the anticipated labor shortage.
- The comprehensive peace agreement recently signed between the Sudanese Government and the Sudan Revolutionary Front rebel alliance (SRF) and the ongoing peace talks with SPLM-N El Hilu are expected to facilitate gradual improvements in security, promote the voluntary return of IDPs, improve trade flows, and increased humanitarian access to most conflict-affected areas in South Kordofan and Darfur. Given the gradual nature of these likely changes, though, no major change in the security situation and access is expected during the outlook period due to the anticipated limited impact of the peace arrangement on the macroeconomic crisis and staple food prices.

For more information, see the Sudan [Food Security Outlook for October 2020 to May 2021](#).

Uganda

- Across most of Uganda, Minimal (IPC Phase 1) outcomes are anticipated through May 2021. Low to near-average food prices, the second season harvest in November/December, and above-normal livestock production will likely provide minimally adequate food and income for most household to meet their basic food and non-food needs. In urban areas and some rural districts that have been worst affected by recent floods, however, some households will most likely face Stressed (IPC Phase 2) outcomes. Among these households, sluggish economic activity, flood-induced crop losses, and high bean prices will continue to limit household income and dietary diversity.
- In Karamoja, food insecurity has improved to Stressed (IPC Phase 2). The green and dry harvests are replenishing household and market stocks, while broadly favorable terms of trade are enhancing household purchasing power. However, household income remains below normal, especially among households that rely on livestock and milk sales. These sales remain limited by localized quarantine measures and market closures to limit the spread of Foot and Mouth Disease and COVID-19. Heightened levels of insecurity and cattle rustling are also compelling farmers to keep animals in protected kraals. By early 2021, deterioration to Crisis (IPC Phase 3) is expected. Many households will likely have food consumption gaps during the lean season, since food stocks will be depleted and local staple food prices are projected to rise to above-average levels.
- In late 2020, humanitarian food assistance coupled with the second season harvest is expected to sustain Stressed! (IPC Phase 2!) or Crisis (IPC Phase 3) outcomes across the refugee settlements. However, food supplies and income sources among refugee households remain below normal and coping capacity has been eroded by COVID-19 restrictions. Deterioration to Crisis! (IPC Phase 3!) is expected between February and May, based on depleted household food stocks, limited income sources, and anticipated reductions in ration sizes.

For more information, see the Uganda [Food Security Outlook for October 2020 to May 2021](#).

Yemen

- In Yemen, conflict continues to drive poor macroeconomic conditions and disrupt livelihoods, reducing access to food and income. Though the recent harvest in some areas is expected to have improved food access for many households, Crisis (IPC Phase 3) outcomes remain widespread. Emergency (IPC Phase 4) outcomes are likely to re-emerge in some areas in the February to May 2021 period as the lean season progresses. Overall, an estimated 17 to 19 million people are expected to be in need of humanitarian food assistance throughout the projection period. While not the most likely scenario, Famine (IPC Phase 5) would be possible in the event that food imports are significantly disrupted for a prolonged period of time.
- As of September 2020, the Yemeni Rial continued to depreciate in southern areas, contributing to further increases in already above-average prices of food and non-food commodities. The Rial depreciated by 4-5 percent in southern areas from August to September, reaching 793 YER/USD according to data from FAO. According to data from UNVIM, food imports through the Red Sea Ports of Al Hudaydah and Salif have maintained relatively higher levels in recent months, with the July to September 2020 average 65 percent higher than the average from the preceding months from January to June 2020. Despite this, concern is mounting over the possible suspension of Yemen's import financing mechanism.
- Fuel shortages ongoing since June continue to impact Yemen, particularly in the north. From June to September 2020, average monthly fuel import levels were 60,000 MT, only one-third of the January-May 2020 average. Prices of diesel and petrol remain 13 and 14 percent higher, respectively than prices six months ago. This is impacting typical livelihood activities including in agriculture and transportation and is putting further upward pressure on food prices given the importance of fuel for agricultural production, food processing, and transport.

For more information, see the [Yemen Food Security Outlook for October 2020 to May 2021](#).

Remote Monitoring Countries¹

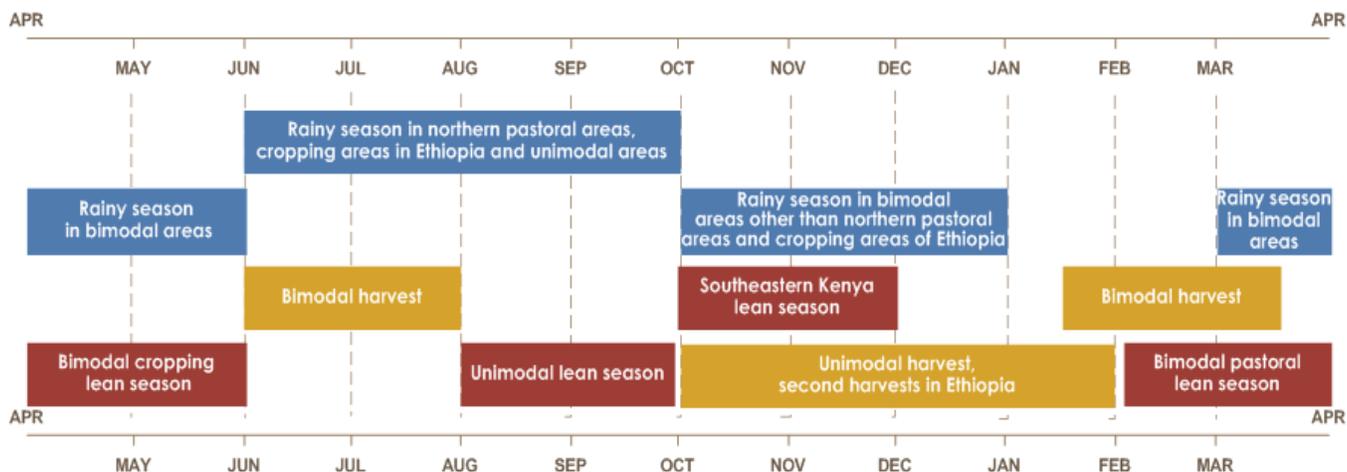
Rwanda

- On September 25, following a drop in active COVID-19 cases, public transport began operating at full capacity across the country, slightly reducing transportation costs. Additionally, the reopening of schools in October has allowed the education sector to resume for the first time since March. If COVID-19 infection rates continue to remain low, economic recovery in formal and informal sectors is likely to improve income-earning opportunities and food access for urban households, driving improvements in urban food security from Stressed (IPC Phase 2) to Minimal (IPC Phase 1) by February 2021.
- The ongoing agricultural 2020/2021 Season A is progressing well. The rains started on time in mid-September, except in parts of the Northern and Eastern provinces where the rains were delayed by two to three weeks but were only slightly below average and generally well distributed. Average to below-average Season A harvests are expected from December 2020 to January 2021, reducing food prices and improving household food access. However, the price of beans is likely to remain high through the first quarter of 2021, driven by the prospect of a below-average harvest in the Eastern province and limited imports from Uganda.
- Following the peaceful Burundian presidential election in May 2020, an agreement between UNHCR and the Rwandan and Burundian governments was reached to facilitate the voluntary repatriation of Burundian refugees. Since August 27, there have been six convoys repatriating a total of 3,062 Burundian refugees. Approximately 500 refugees are expected to return to Burundi every two weeks due to the transit site's capacity in northwestern Burundi, limiting the return rate.

For more information, see the Rwanda [Remote Monitoring Report for October 2020 to May 2021](#).

¹ With remote monitoring, an analyst typically works from a nearby regional office, relying on a network of partners for data. Compared to previous series of countries in which FEWS NET has a local office, reports on remote monitoring countries may offer less detail.

SEASONAL CALENDAR FOR A TYPICAL YEAR

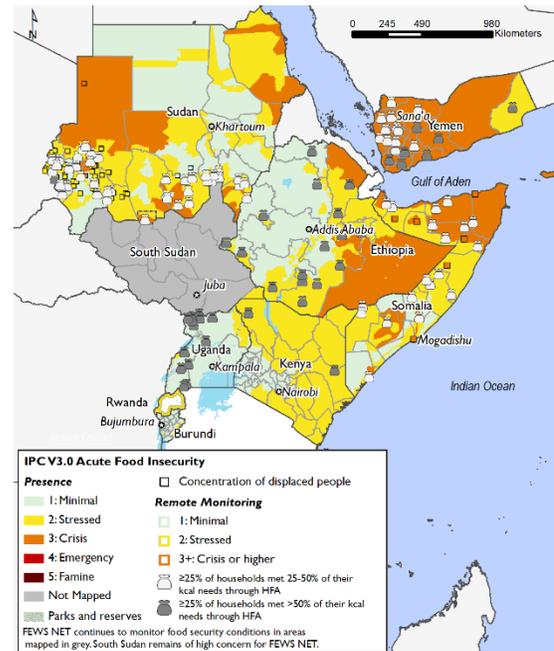


Source: FEWS NET

MOST LIKELY FOOD SECURITY OUTCOMES AND AREAS RECEIVING SIGNIFICANT LEVELS OF HUMANITARIAN ASSISTANCE*

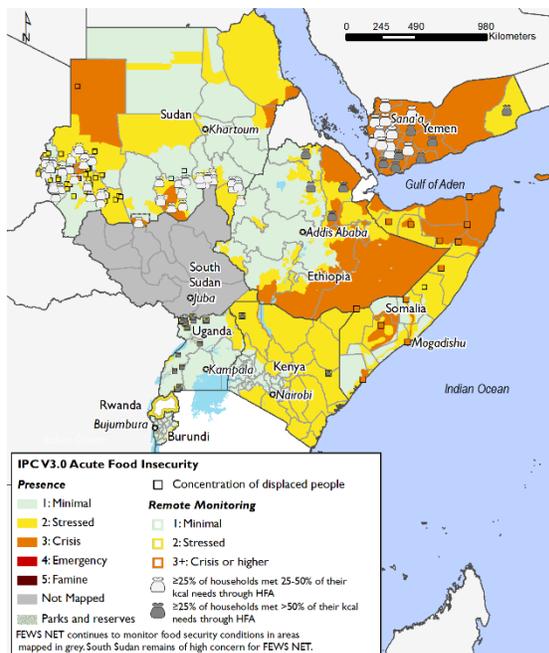
Each of these maps adheres to IPC v3.0 humanitarian assistance mapping protocols and flags where significant levels of humanitarian assistance are being/are expected to be provided. ☹️ indicates that at least 25 percent of households receive on average 25–50 percent of caloric needs from humanitarian food assistance (HFA). 🏠 indicates that at least 25 percent of households receive on average over 50 percent of caloric needs through HFA. This mapping protocol differs from the (!) protocol used in the maps at the top of the report. The use of (!) indicates areas that would likely be at least one phase worse in the absence of current or programmed humanitarian assistance.

Current, October 2020



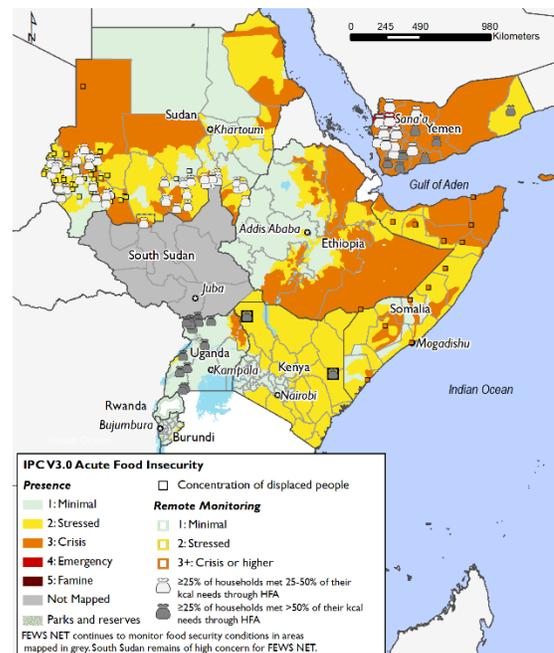
Source: FEWS NET

Projected food security outcomes, October 2020 to January 2021



Source: FEWS NET

Projected food security outcomes, February to May 2021



Source: FEWS NET

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ABOUT SCENARIO DEVELOPMENT

To project food security outcomes, FEWS NET develops a set of assumptions about likely events, their effects, and the probable responses of various actors. FEWS NET analyzes these assumptions in the context of current conditions and local livelihoods to arrive at a most likely scenario for the coming eight months. [Learn more here.](#)