# EAST AFRICA Assumptions for Quarterly Food Security Analysis

April 2015

**ABOUT THIS REPORT**

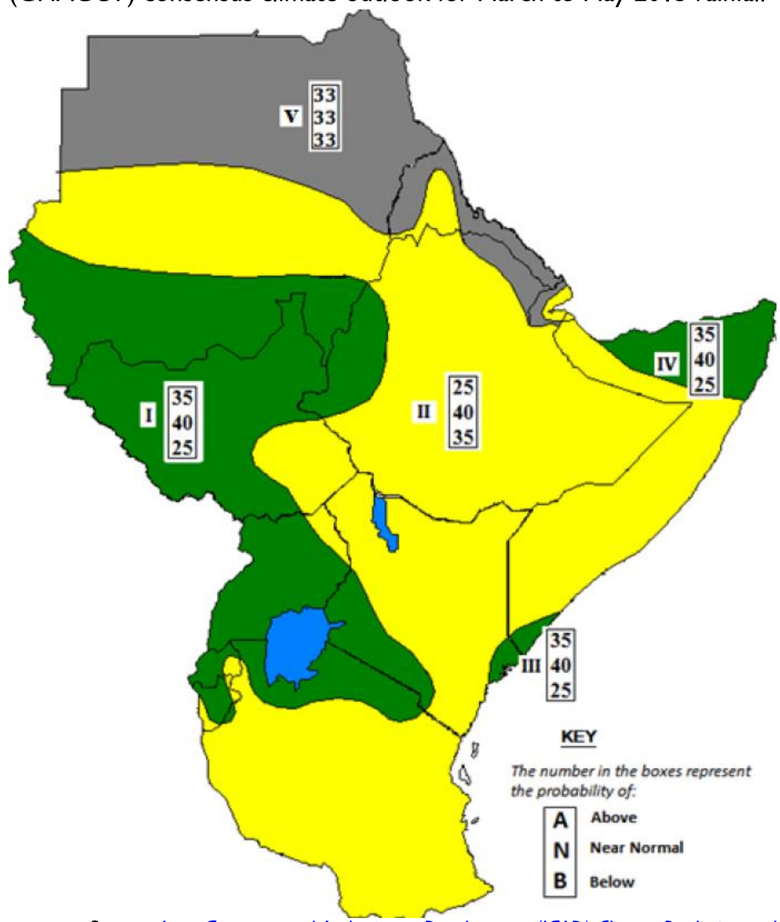
To project food security outcomes, FEWS NET uses scenario development. In this methodology, an analyst uses current evidence to develop assumptions about the future and compare their possible effects. The following report outlines assumptions at the regional level. Assumptions are also developed at the country level; these are likely to be more detailed. Together, the regional and national assumptions are the foundation for the integrated analysis reported in FEWS NET's Food Security Outlooks and Outlook Updates. Learn more about our work here.

FEWS NET's Food Security Outlook reports for April to September 2015 are based on the following regional assumptions:

## SEASONAL PERFORMANCE

- The **February-to-May *Belg* rains in the northeastern highlands, central and eastern Oromia, and SNNPR in Ethiopia** are expected to be near average in terms of cumulative rainfall and to start late. More frequent and longer dry spells are expected during the season.
- **In Tanzania, the March-to-May *Msimu* rains are expected to be near average to below average in the unimodal southern, eastern, and central parts of country** and to end normally between May and June.
- The **March-to-May rains in Rwanda, Burundi, Uganda and northwestern Tanzania** are likely to be near average in terms of cumulative rainfall with a near normal timing of their start (Figure 1).
- The **March-to-May rains in the eastern Horn of Africa** are likely to be near average to below average in terms of cumulative rainfall, especially over eastern Kenya and southern Somalia, and will also have a late start and erratic distribution (Figure 1).

**Figure 1.** 39th Greater Horn of Africa Climate Outlook Forum (GHACOF) consensus climate outlook for March to May 2015 rainfall

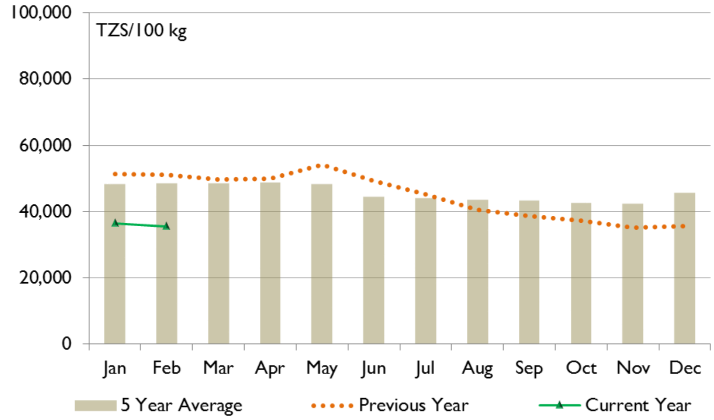



Source: *Inter-Governmental Authority on Development (IGAD) Climate Prediction and Applications Center (ICPAC)*

- In **Yemen, the March-to-November rains** will have near average cumulative rainfall in both unimodal and bimodal areas with a normally timed start. The peak of rainfall will be between June and September.
- The start of the **June-to-September rains over Sudan, South Sudan, and western Ethiopia** is likely to be normally timed with average to below average amounts of rain.
- The **June-to-September *Karan/Karma* rains over Djibouti, Afar and northern Somali Region in Ethiopia, and northwestern Somalia** are likely to have a normally timed start and have average to below average amounts of rain.

## REGIONAL TRADE AND PRICE DYNAMICS

**Figure 2.** Wholesale white maize prices in Arusha, Tanzania, Tanzanian shilling (TZS) per 100 kilogram (kg) sack, 2010 to 2014 five-year average, January 2014 to February 2015




Source: [Tanzania's Ministry of Industry, Trade, and Marketing] *(MITM)*

- Although the January-to-February *Vuli* harvests in the northeastern bimodal areas of Tanzania were below average, maize supplies remain in markets from the above normal July-to-September *Masika* harvests in these areas and the May-to-August harvests in the Southern Highlands**. Above normal availability and relatively lower prices of maize in Tanzania that are on average below recent five-year averages** (Figure 2) **are expected to continue to encourage above-average exports to southeastern Kenya, Rwanda, and Burundi between April and June** Additional exports will follow the release of old stocks at the start of the *Msimu* harvest in May in the surplus-producing southern regions of Tanzania.

- In Uganda, the above normal November-to-December maize harvest in conjunction with decreased volume of exports to South Sudan ever since the start of conflict in late 2013, have exerted downward pressure on prices, which are generally still below prices last year. **These low prices are expected to lead to above-average volume of exports to Kenya between April and June**, but exports are expected to face stiff competition with exports from Tanzania, preventing these exports from reaching markets east of Nairobi**.**

- **Food exports from Uganda to South Sudan will remain less than during the pre-conflict period but higher than last year**, due to reduced incidences of clashes and easier transactions between cross-border traders. In addition, exports from Ethiopia and Sudan to South Sudan are expected to increase gradually from their low bases, especially to Jonglei and Upper Nile States. However, in areas of conflict, supply from imports and from surplus-producing areas of the country will continue to be constrained by high levels of tension and lawlessness, especially before the onset of the rains in May/June, due to the lack of transport facilities, high levels of formal and informal taxes, tariffs, and fees, and other factors that increase marketing costs. In most of the country, limited availability of fuel and the depreciation of the currency are expected to increase the costs of most commodities, including staple foods.

- Staple food production in Sudan was above average and well above the below-average 2013/14 harvest. The prices of sorghum and millet will likely be at or drop below last year's prices between April and June, but they will likely remain well above their five-year averages due to high inflation and currency depreciation. **As a result, exports from surplus-producing areas in Blue Nile, Sinar, White Nile, and Gadarif States in Sudan to the northern states of South Sudan, including Upper Nile, are expected to be relatively higher than last year.**

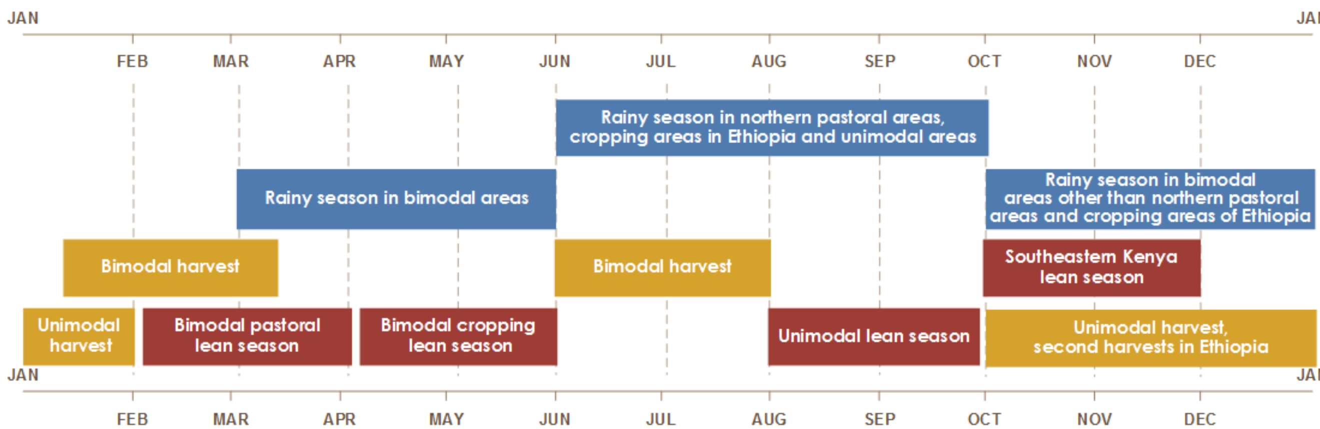
- **Maize exports from Ethiopia to northern Kenya are expected to continue at seasonally normal levels between April and June** due to above-average supply from the October-to-January *Meher* harvest. However, supplies to Mandera County in northeastern Kenya may be limited by insecurity. **Sorghum exports from Ethiopia to Djibouti are also expected to be near average through June.**

- The January-to-February *Deyr* harvest of maize and sorghum in southern Somalia was estimated at 105,300 metric tons (MT), which is 29 percent higher than in 2014 and five percent higher than the five-year average. **Sorghum and maize imports into southern Somalia from Ethiopia between April and June will likely be limited** by better local availability from the slightly above-average harvest. However, **exports from Ethiopia to central and northern Somalia are expected at normal volumes.**

## CROSS-BORDER CONFLICT AND DISPLACEMENT

- According to the United Nations High Commissioner for Refugees (UNHCR), 514,974 people fled South Sudan between December 15, 2013 and March 31, 2015. Due to a combination of ongoing fighting, expected high phases of acute food insecurity in Greater Upper Nile, and the growth of political instability and inter-communal conflict elsewhere in South Sudan, **cross-border outmigration from South Sudan to neighboring countries, including of refugees, over the course of 2015 is likely to reach levels similar to or slightly below 2014 with a likely peak between April and June** during the lean season but before the start of the rains.

## SEASONAL CALENDAR IN A TYPICAL YEAR




Source: *FEWS NET*