

RWANDA: Food Security Outlook

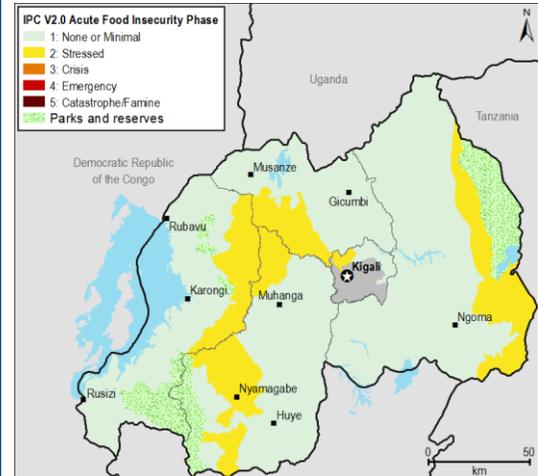
October 2013 to March 2014

Atypically high prices restrict food access for poor, market-dependant households

KEY MESSAGES

- Prices for key staple foods rose at an atypical rate between August and September, due to the market impacts of below-average season 'B' harvests. On average across the country, September bean prices were 42 percent above last year's levels. High prices will continue to reduce food access for poor households who are market dependant until the next harvest in December/January.
- Intense rainfall at the beginning of the short rainy season (September) damaged crops across the country. This, along with a recent dry spell in October, negatively impacted seed germination and crop development. As a result, the season 'A' harvest in December/January may be delayed and slightly below-average.
- Due to below-average household food stocks and high prices, food security outcomes for poor households in the East Congo-Nile Highland Farming zone, the Western Congo-Nile Crest and Food Cropping zone, and the Eastern Semi-Arid Agro-Pastoral zone are deteriorating. Poor households in these areas will face Stressed (IPC Phase 2) acute food insecurity until the next harvest in December/January.

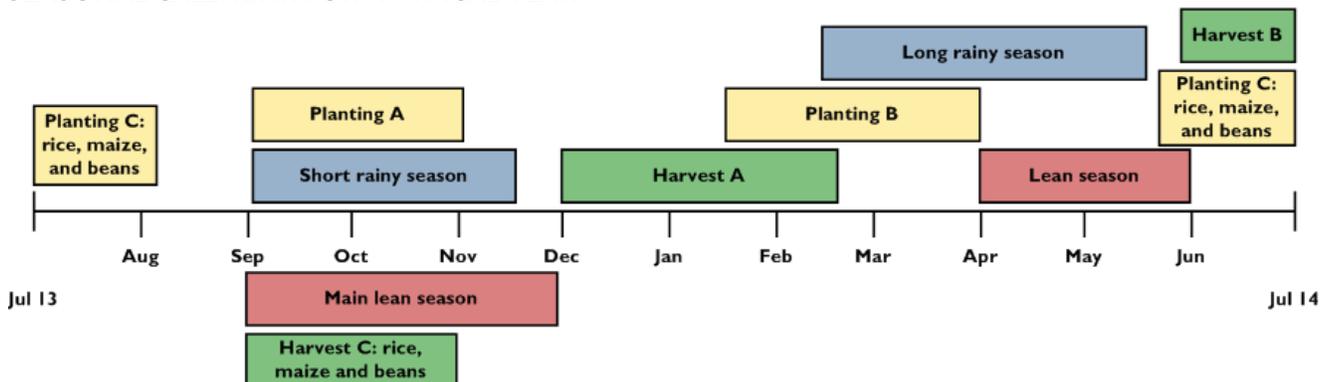
Figure I. Current food security outcomes for October, 2013



Source: FEWS NET

This map represents acute food insecurity outcomes relevant for emergency decision-making, and do not necessarily reflect chronic food insecurity. Visit www.fews.net/IPC for more on this scale.

SEASONAL CALENDAR FOR A TYPICAL YEAR



Source: FEWS NET

NATIONAL OVERVIEW

Current Situation

Household food stocks

During a normal year, poor households deplete their food stocks from their own crop production during the month of October. However, due to a moderately below-average season 'B' harvest in June/July, household food stocks depleted this year in September, one month earlier than normal. Poor households across the country are currently accessing food through market purchases, along with the consumption of drought-resistant perennial crops, such as bananas and cassava.

Progress of agricultural season 'A'

The short rainy season (September to December) started on-time with strong thunderstorms. While these storms generally benefited seed germination and crop development, intense rainfall and strong winds destroyed 1,262 Ha of newly planted seedlings across the country. Affected households need to replant, although they have yet to begin these activities due to a three week dry spell in October. The dry spell also caused plant wilting, particularly to drought-sensitive crops like maize. Harvesting activities for season 'C' legumes and vegetables in marshland areas are ongoing with average production levels expected. However season 'C' only contributes about 10 percent of national annual production and will not be sufficient to offset the effects of the below-average harvest in June/July.

Livestock conditions

The ongoing short rains have regenerated pastures and refilled watering holes to normal levels. This has contributed to an improvement in both livestock body conditions and milk availability. Milk and animal prices are currently at seasonally normal levels.

Other income sources

Labor sales are an important source of income for poor households.

Due to ongoing planting activities, opportunities for labor work are seasonally high, causing a normal increase in wages from 800 RWF per day during the dry season (June to August) to 1,200 RWF per day in October. In addition to planting crops, poor households are generating normal levels of income from petty trade and labor work relating to the Vision 2020 Umurenge Program.

Markets and prices

In response to the poor season 'B' harvest, cross-border trade flows with neighboring countries, including rice imports from Tanzania and bean imports from Uganda, have increased significantly between July and September 2013. However, atypically high food prices were observed in September due to above-average market demand and below-average market supply. For example at the wholesale market in Kigali, which is a good indicator of national price trends, prices for maize, beans, and Irish potatoes were seven, 41 and 16 percent, respectively, above September 2012 levels. Bean production was hardest hit by last season's poor harvest, contributing to the large price increase for this commodity.

Refugees and returnees

An estimated 7,324 Rwandans were expelled from Tanzania in August 2013. While approximately 4,200 returnees have been re-integrated into local communities, 3,120 have settled in the Kiyanzi temporary camp in Nyamugali sector (Kirehe District). In addition, approximately 70,000 refugees from the Democratic Republic of the Congo, including 14,000 new

Figure 2. Projected food security outcomes, October to December 2013

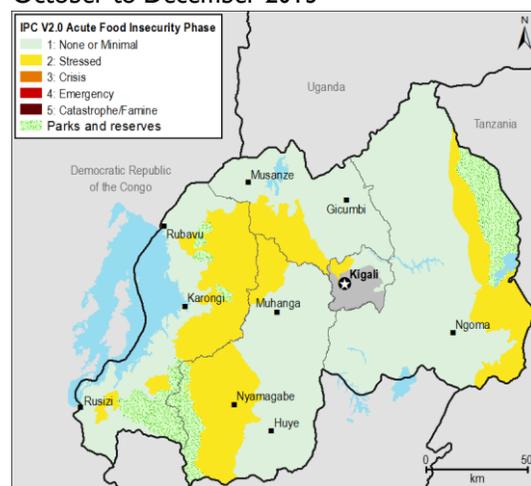
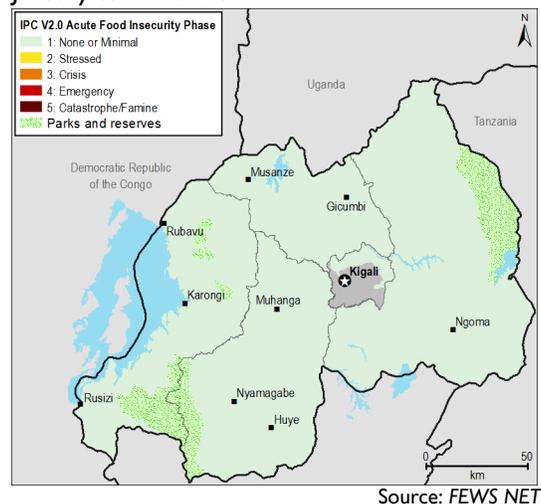


Figure 3. Projected food security outcomes, January to March 2014



This map represents *acute* food insecurity outcomes relevant for emergency decision-making, and do not necessarily reflect *chronic* food insecurity. Visit www.fews.net/IPC for more on this scale.

refugees who arrived last year, are living in camps located in Nyagatare, Karongi, Gicumbi, Rubavu, Nyamagabe, and Ngoma districts. Refugees and returnees residing in camps remain highly dependent on humanitarian assistance provided by UNHCR and WFP.

Assumptions

The most likely scenario for October 2013 to March 2014 is based on the following national-level assumptions:

- **Rainfall:** Seasonal forecasts from major forecasting centers ([ICPAC](#), [NOAA](#), [ECMWF](#), [IRI](#)) indicate an increased probability of normal to above-normal rainfall across the country for the remainder of the short season. The onset and intensity of rainfall during the long rainy season (February to May) will also be normal.
- **Season 'A' harvest:** Due to rainfall anomalies in September and October that delayed planting activities and caused crop wilting, the season 'A' harvest in December/January will be delayed and slightly below-average.
- **Household food stocks:** Due to a below-average season 'B' harvest, households have already depleted their food stocks and will rely on either market purchases or perennial crops to meet consumption needs until the next harvest in December/January. This new harvest will then replenish food stocks, enabling households to consume their own crop production between January and March 2013.
- **Livestock conditions and prices:** Pastoral conditions will remain satisfactory due to the ongoing short rains and the upcoming long rains. Livestock body conditions will remain stable and at relatively normal levels, positively impacting milk availability and animal prices.
- **Agricultural labor:** Agricultural labor demand is expected to remain normal, with two peaks in October and January relating to land preparation, planting, threshing, and harvesting activities. Labor supply and wages will be normal.
- **Refugees and returnees:** Due to heavy fighting between the government and rebel groups in the Democratic Republic of the Congo, refugees inflows will continue at current levels. A large number of returnees will also reenter Rwanda for the following reasons: 1) an estimated 70,000 Rwandan refugees lost their refugee status in June 2013 due to the UNHCR Cessation Clause and 2) political tensions continue between the Tanzanian and Rwandan governments.
- **Transportation:** Fuel prices will remain stable throughout the outlook period. However, access to rural markets in mountainous areas will be restricted during the short and long rainy seasons due to poor road conditions.
- **Cross-border trade:** Imports from neighboring countries, including Tanzania and Uganda, will continue through December at atypically strong levels. These trade flows will then normalize for the second half of the outlook period (January to March).
- **Staple food prices:** Due to above-average demand and below-average supply of key staple foods, prices will continue to increase at a faster rate than is seasonally normal until the next harvest in December/January. Prices will then decline in January before stabilizing in February and March. During the entire outlook period, price will remain above last year's levels. Prices for perennial crops, such as cassava and bananas, will also remain above-average as households increase their consumption of these products in response to below-average harvests of other crops.

Most Likely Food Security Outcomes

Poor households in most areas of the country will face Minimal (IPC Phase 1) acute food insecurity between October 2013 and March 2014. While households became market dependant in September, one month earlier than normal, average income levels from activities such as labor work and animal sales will help offset the effects of the below-average harvests through the end of the lean season in December. In addition, poor households will switch to cheaper foods, such as sorghum, and/or increase their consumption of perennial crops to meet their consumption needs. During the second half of the outlook period (January to March 2014), household food stocks will be replenished by the season 'A' harvest. Labor opportunities relating to the 2014 agricultural season 'B' will also enable poor households with little to no land to earn enough cash income to purchase food on local markets, despite food prices that will remain above last year's levels.

However in three areas of concern discussed below (the Eastern Semi-Arid Agro-Pastoral livelihood zone, the East Congo-Nile Highland Farming livelihood zone, and the West Congo-Nile Crest Tea livelihood zone), poor households are highly vulnerable to food security-related hazards and the below-average season 'B' harvests will cause households to have difficulties accessing food during the peak of the lean season (October to early December). In these areas, poor

households will engage in a variety of atypical coping strategies, such as temporary migration to other zones and/or the sale of additional small animals, and will face Stressed (IPC Phase 2) food security outcomes.

AREAS OF CONCERN

Eastern Semi-Arid Agro-Pastoral Zone

Current Situation

Seasonal 'B' harvests and current food stock levels

Endowed with fertile young soils, this livelihood zone is especially vulnerable to poor rainfall performance. As a result, an early end to the 2013 long rainy season (March to May) had a more severe impact on the season 'B' harvest compared to other areas of the country. In particular, the harvest of maize - an important crop for the zone - was affected with a decline in production estimated at 15 percent compared to average. Household food stocks in this zone depleted in August, one month earlier than normal.

Labor incomes

Planting activities for agricultural season 'A' are ongoing, providing labor opportunities to poor households at relatively normal wages, ranging from 700 and 1,000 RWF per day. However, the October dry spell disrupted planting activities in localized areas, reducing agricultural labor demand slightly. The Land Husbandry, Water Harvesting and Hillside irrigation (LWH) project is also a major employer in this zone, with three sites in Kayonza district and two sites in Gatsibo district. Each site employs approximately 3,000 people per day for terracing activities. Wages for labor work at these sites are similar to agricultural wages in the zone.

Livestock income

Livestock ownership is common in this zone, with poor households generally owning a few goats and/or poultry. With the onset of the short rains, pasture availability has seasonally improved and livestock are in good physical condition. In addition, livestock prices are stable but above last year's levels, generating favorable incomes for agropastoralists. Milk production levels and prices are seasonally normal.

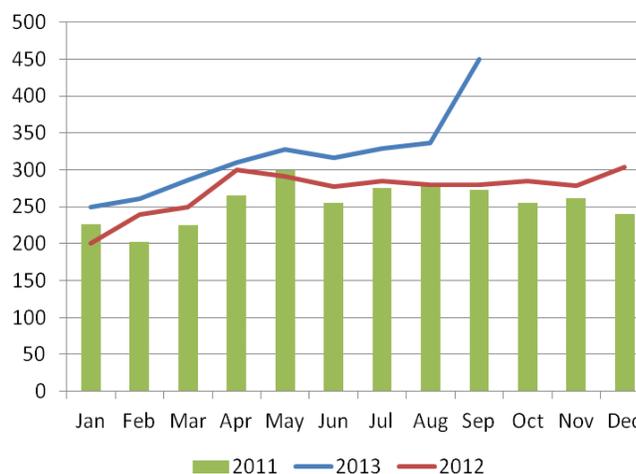
Staple food prices

Increased market demand and below-average market supply, due to the poor season 'B' harvest, caused significant price increases for staple foods. This has limited food access for poor households making market purchases. For example at Nyakarambi market, September bean prices were 450 RWF/kg, 34 percent higher than the previous month's levels and 61 percent above September 2012's levels (Figure 4). Prices for other key commodities, such as maize and cooking banana were also five and 44 percent, respectively, above last year's levels.

Refugees and returnees

Of the estimated 7,324 Rwandans who were expelled from Tanzania in August 2013, almost all of them settled in this zone with approximately 43 percent living in the Kiyanzi temporary camp in Nyamugali sector. Efforts are being made to help these returnees integrate into local communities but until they rebuild their livelihoods, they will likely have difficulties meeting basic food needs. Those residing in camps will also rely heavily on food rations from the World Food Programme.

Figure 4. Bean prices, Nyakarambi market in Kirehe (RWF/kg)



Source: FEWS NET

Assumptions

The most likely scenario for October 2013 through March 2014 for the Eastern Semi-Arid Agro-Pastoral zone is based on the following zone-level assumptions:

- **Returns:** Given ongoing tensions between the governments of Rwanda and Tanzania, additional Rwandan returnees will cross the border into Rwanda and settle in temporary camps located within this livelihood zone.
- **Staple food prices:** Prices are expected to increase steeply throughout the lean season (October to December) before then declining gradually in January due to fresh harvest. However, prices will remain above last year's levels.

Most Likely Food Security Outcomes

Due to an increased vulnerability to food security-related shocks, last season's below-average crop production, as well as atypically high food prices, will cause poor households in this zone to have difficulties accessing food during the October to December lean season. During this time period, households will employ atypical coping strategies, such as selling additional chickens, rabbits, goats, and sheep, and consuming less preferred food items, such as sorghum and sweet potatoes. **During this time period, households are expected to face Stressed (IPC Phase 2) acute food insecurity.**

From January to March, poor households will rely mostly on their own season 'A' production. In addition, food prices will decline and normal incomes from casual labor, small animal sales, and crop sales will enable households to supplement their own production with market purchases. **Between January and March, poor households in this zone will face Minimal (IPC Phase 1) acute food insecurity.**

East Congo-Nile Highland Farming Zone and West Congo-Nile Crest Tea Zone

Current Situation

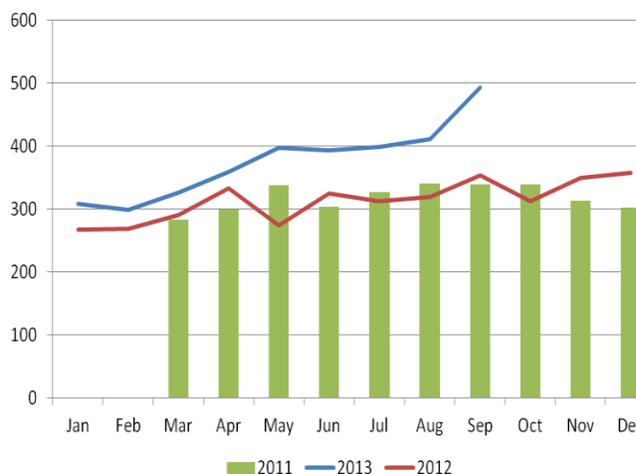
These mountainous livelihood zones are prone to soil erosion, landslides, and flooding during the short and long rainy seasons. During agricultural season 'B', several rainfall anomalies negatively impacted crop production: 1) a late onset of the rains in some localities, 2) heavy and above-average rainfall levels in April that caused crop damages, and 3) an early end to the season, approximately one month earlier than normal. As a result, total season 'B' crop production was estimated to be approximately 15 to 20 percent below average.

Due to this poor crop production, most poor households depleted their food stocks in August, approximately one month earlier than normal. Currently, households are meeting their food needs through a combination of food purchases and the consumption of perennial crops, such as cassava. Harvesting activities for season 'C' legumes and vegetables in marshland areas is also ongoing, although this harvest is not large enough to replenish households' depleted stocks.

The main income source for poor households is labor sales, including assisting with planting activities on the farms of the better-off, working on local tea plantations, doing road construction under the Vision 2020 Umurenge Program, and doing terracing activities with the Land Husbandry, Water Harvesting and Hillside irrigation (LWH) project. Poor households report that current wages are relatively normal and similar to last year's levels. Livestock body conditions are seasonally good due to the effects of the short rains on pastoral resources, and milk and animal prices are at normal levels.

Due to below-average market supply, food prices did not decline during the harvest and post harvest period for agricultural season 'B', but instead were stable. In addition, between August and September, food prices increased sharply, with the price of beans rising 20

Figure 5. Bean prices, Kabacuzi market in Nyamagabe (RWF/kg)



Source: FEWS NET

percent. Bean prices also rose 40 percent compared to last year's levels. These atypically high prices are limiting food access for poor households who are market dependant at this time.

Both of these zones have a relatively large refugee population from the DRC (around 67,000 refugees in total). Of this refugee population, approximately 14,000 are relatively new, having settled in the area during the past year. Refugees are residing in camps and are entirely reliant on food and nonfood assistance from WFP and other humanitarian partners. The presence of these refugees has had little to no impact on local markets.

Assumptions

The most likely scenario for October 2013 through March 2014 for the East Congo-Nile Highland Farming Zone and West Congo-Nile Crest Tea Zone is based on the following zone-level assumptions:

- **Season 'A' harvest:** Forty seven tons of Irish potato seeds that were distributed by the Ministry of Agriculture had to be exchanged due to poor quality, causing planting delays in localized areas. As a result, season 'A' harvests in December/January 2014 will be delayed and slightly below-average.
- **Cash crops:** Production of coffee and tea does not vary seasonally and will therefore remain at relatively stable levels throughout the scenario period. Production of these crops will provide a steady source of labor opportunities for poor households.
- **Trade:** Cross border trade will behave normally between Rwanda, Burundi, and the DRC. This zone trades mainly with the Southern part of Kivu (Bukavu border).
- **Prices:** Prices for staple foods, including beans, will continue to increase at a faster rate than normal across most markets. Prices for imported rice, wheat, and sugar from Kenya and Uganda will decline due to the inauguration of a single customs window in October/November 2013 that will minimize roadblocks and other non-tariff barriers to trade.

Most Likely Food Security Outcomes

Between October and December, households in these zones will face Stressed (IPC Phase 2) food security outcomes. Due to below-average season 'B' harvests, many households depleted their household food stocks one month early than normal and will dependant on market purchases until the start of the next harvests in December/January. In addition, rising food prices and stable labor wages in these two zones have caused household purchasing power to decline, resulting in many households having difficulties accessing food through market purchases. Poor households will attempt to offset the impacts of their below-average food stocks and high food prices by selling additional small animals (ex. chickens, rabbits, goats, and sheep) and working more days of casual labor. They will also employ consumption-based coping strategies including reducing food intake and switching to less preferred foods (ex. cassava).

Once the harvests start in December/January, households will rely on their own crop production, including beans, banana plantains, peas, sweet potatoes, and fresh and dry cassava to meet both essential food and nonfood needs without engaging in any atypical coping strategies. Therefore **between January and March, households will face minimal to no food insecurity (IPC Phase 1).**

EVENTS THAT MIGHT CHANGE THE OUTLOOK

Table 1: Possible events over the next six months that could change the most-likely scenario.

| Area | Event | Impact on food security outcomes |
|---------------------------------------|--|---|
| National | The October dry spell continues through the remainder of agricultural season 'A' | Season 'A' harvests will be significantly below-average. Food prices will also remain atypically high. Poor households, particularly in the East Congo-Nile Highland Farming zone, the Western Congo-Nile Crest and Food Cropping zone, and the Eastern Semi-Arid Agro-Pastoral zone, will have difficulties accessing food and Stressed (IPC Phase 2) food security outcomes would be likely during the April/May lean season. |
| National | Increase in fuel prices | Increased transportation costs that could cause staple food prices to increase |
| National | Export ban imposed by neighboring country | Trade flows would be disrupted and prices at local markets would likely increase at a faster rate than is currently observed. |
| East Congo-Nile Highland Farming Zone | DRC refugees return home | The departure of the refugees would reduce labor competition pressure, causing slightly higher wages for local 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. To learn more about this approach to scenario development, visit www.fews.net/scenario_development.