



Summary

Households in northern Uganda continue to face moderate to high food insecurity because of uncertain civil insecurity. Most households have exhausted their coping mechanisms and mainly depend on external aid. Normal food security is reported in other parts of the country, based on normal crop availability and access. High maize production has stabilized staple prices notwithstanding high local and regional demand, which may provide incentives for farmers to grow more maize in the coming season. However, there are concerns that limited seed availability may restrict farmers' attempts to increase acreage.

1.0 Northern Uganda: Gulu, Kitgum and Pader Districts

Civil insecurity continues to plague Gulu, Kitgum, and Pader Districts in northern Uganda, restricting a major portion of the population there to internally displaced people's (IDP) camps with minimal access to fields. Most IDPs still depend on food aid supplied by the World Food Programme (WFP) for a large portion of their food needs. For instance, reports from the field indicate that IDPs in Gulu District access only 25 percent of their food needs from harvests and other sources, including labor sales. WFP augments this by providing the balance of 65 percent of the daily minimum requirement. However, many of the food aid beneficiaries indicate that these rations are not adequate to sustain them. Overall, food security remains precarious.

Road access is also limited due to sporadic attacks. In all three districts, markets supplies are low pushing prices higher than normal. In addition, income opportunities are limited. There are few labor opportunities, and people obtain cash mainly by selling fuel wood and charcoal, which bring them little money in relation to their needs, particularly given the high staple prices. The current dry season further limits any crop growth and harvesting of green vegetables. Many women gather wild leaves along the streams and yams in

the forests, while men hunt and fish in a few nearby streams to supplement the meager food available to the IDPs.

As earlier reported, some of the IDPs in a few areas of the three districts were able to utilize periods of relative calm to cultivate crops, which they are now harvesting. Nonetheless, sporadic attacks still hinder their access to fields, especially those that are further from the camps. Only a few people have reportedly begun to prepare land for the first season. In addition, these conditions are limiting dry millet sowing, an activity that normally takes place about this time.

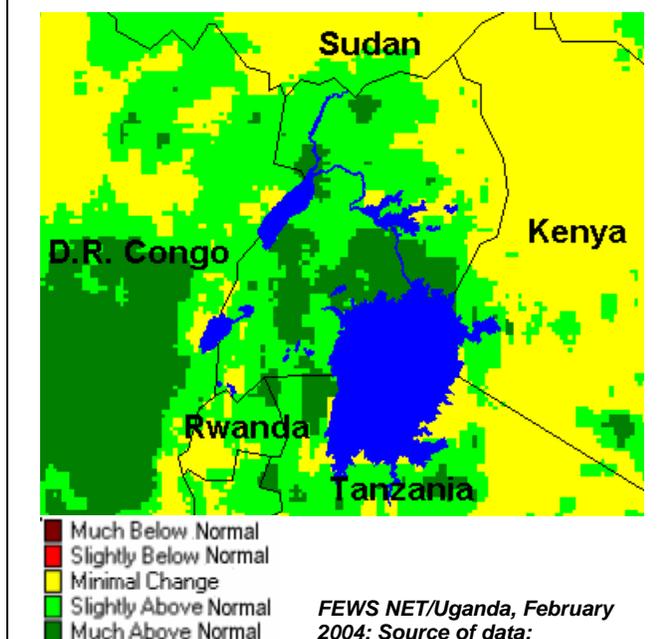
Normal household food security conditions are apparent in other parts of the country, including Karamoja Region. Livestock/grain terms of trade remain normal in Karamoja. The current dry period has further reduced vegetation and water availability, limiting livestock's access to pastures and water. Normal migration in search of pastures and water is reported.

2.0 National Trends:

2.1 Agro-climatic Conditions: January is normally a dry period in Uganda. However, January 2004 was generally wetter than normal throughout the country with the exception of Karamoja, where the normal dry season is in progress. This trend is similar to trends in the past three years. Normal dry conditions returned by the end of the month and continued into early February. The Meteosat image (Figure 1), which shows the spatial distribution and intensity of rainfall in Uganda, compares well with ground station observations, indicating normal to above-normal rainfall for most of the country.

A Greater Horn of Africa Regional Climate Forecast Forum will be held in late February 2004. Following the meeting, the Uganda Department of Meteorology is expected to issue a weather forecast for the next season, which begins in February or March.

Figure 1: Rainfall Estimates, January 2004 Vs Long Term Average



2.2 Crop Production and Conditions: The 2003 second season (August to December) harvest is over in Uganda's bimodal districts, where crop and household food stocks are reportedly normal. Ample supplies of key staple crops, such as beans, matooke, millet and sorghum, were harvested. Well-distributed rainfall in the second season benefited normal matooke (cooking banana) development, making up for drier conditions during the first half of 2003, and as a result, normal matooke production is reported in the key growing districts of Bushenyi, Mbarara and Ntungamo. Unseasonable rainfall during January 2004 also benefited other perennial crops, such as coffee.

Based on anecdotal field and trader estimates, FEWS NET estimates that the 2003 second season maize production is more than twice the initial estimates of 100,000 MT (refer to FEWS NET Uganda report of November 2003). This has been attributed to the overlap of the first and second seasons, which enabled maize planted late in the first season to yield a good crop during the

second season. As the dry crop enters the market, it now appears that at least 125,000 MT of maize is commercially available.

Farmers have not yet started cultivating for the first season of 2004. Rains are expected to begin no later than March.

3.0 Commodity Prices, Trade and Food Availability and Access

The second harvest has increased staple crop supplies to the major district markets, generally keeping prices stable.

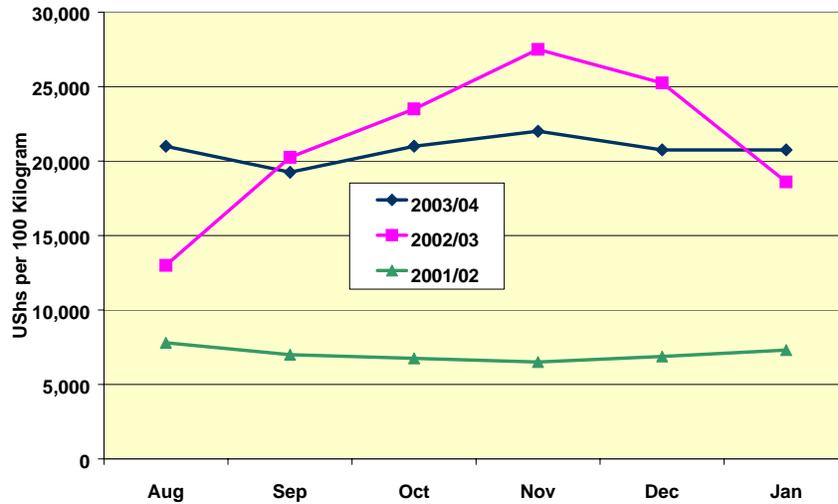
Significantly, higher maize production in the last season has met the national consumption and humanitarian food aid demands within the country and has helped to provide cereal supplies to other countries in East Africa, where harvests have been poor. The high demand coupled with high supply has maintained stable but higher than normal wholesale maize prices over the last 6 months. In contrast, for the same period in 2001/02, production was high, but the overall demand was lower, resulting in a price slump. This maize wholesale price trend is illustrated in Figure 2 using Masindi, a major second season production district.

Meanwhile, increased matooke production has led to 150 percent fall in the commodity's price in Mbarara District last month, as shown in Figure 2. Price declines have also been observed in major consumption markets in Kampala and Jinja.

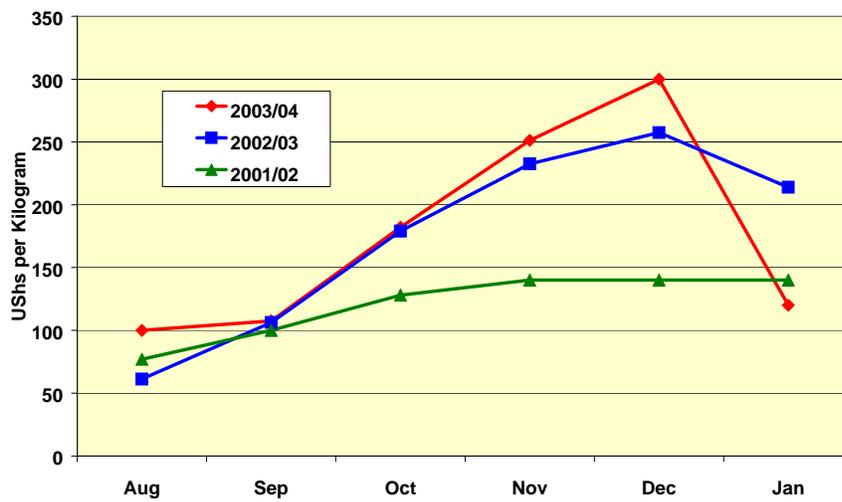
Strong purchasing signals in maize deficit Kenya and Tanzania are leading Ugandan farmers to consider increasing maize production in the coming season. However, short supplies of good quality seed materials may limit production. A high need for households to sell maize at current high nominal prices may also reduce availability of home kept seed. This is cause for concern as it may reduce planting acreage and production therefore limiting the farmers' expectations.

**Figure 2: Commodity Prices in Masindi and Mbarara Districts
August to January, 2001/02 to 2003/04**

Masindi: Maize Wholesale Prices



Mbarara: Matooke (Cooking Banana) Retail Prices



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Source: Market Information Service