



Summary

Humanitarian organizations are increasingly concerned about finding the resources to cover the needs of a growing displaced population in northern and eastern Uganda. The World Food Programme projects a shortfall of nearly 97,000 MT in its PRRO 10121.0. The forecast for a normal season augurs well for production in the first season of 2004. Crop supplies to markets are normal, reflected by relatively stable bean and maize prices.

1.0 Northern Uganda: Gulu, Kitgum, Lira and Pader Districts

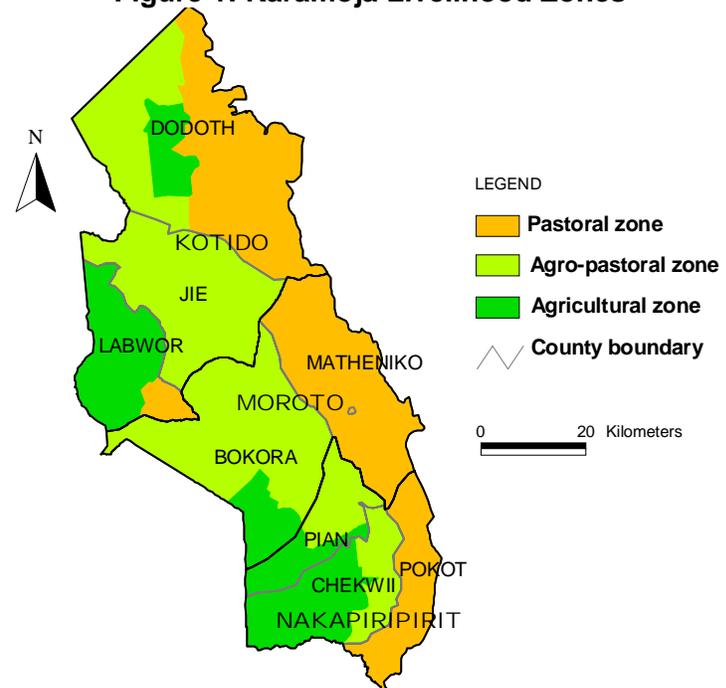
The Lord's Resistance Army (LRA) carried out an attack on a displaced people's camp in Lira District in late February, massacring more than 100 people and creating panic amongst the district's rural population. Over 190,000 persons are said to be displaced by this attack alone. This recent LRA brutality has worsened what was already a bad situation, with nearly 1.5 million people now displaced in Gulu, Kitgum, Pader and Lira Districts, forced away from their traditional livelihoods, and made dependent on external assistance for survival. These four districts in northern Uganda remain the focus of food security monitoring and reporting because of the LRA activity in this area. There are plans to carry out a joint assessment in Lira District in March to determine the nature and magnitude of the problem and to devise appropriate responses. Participants may include the Government of Uganda, UN agencies and non-governmental organizations (NGOs).

LRA rebels have increased their presence in Gulu District, following their retreat from neighboring Lango and Teso Regions over the last two months. As a result, access to cultivable land for the local population, including internally displaced person's (IDPs), has become increasingly limited. Less than 30 percent of the estimated 438,000 IDPs in Gulu District have access to land within a 2 to 3 kilometer radius of the camps, where cassava is grown. Currently, the IDPs meet less than 25

percent of their food needs using their own means, including crop production, trade, employment and other options. Few attacks have been reported in Kitgum and Pader since early February, although many rebels have been sighted moving in small groups. Just like in Gulu, access to arable land is limited in Kitgum and Pader due to insecurity, although it is slightly better in these two districts with the IDPs able to travel up to 5 kilometers outside the camps to harvest crops, including cassava, sweet potatoes, pigeon peas, and sorghum, which are still available from last season.

Market prices are significantly higher than normal in Gulu District. For instance, prices for millet and sorghum, the key staple crops, are 40 percent higher than normal, while staple prices in Kitgum and Pader Districts are reportedly no higher than 15 percent above normal. In all three districts, IDPs rely on selling vegetables, firewood, charcoal and labor to earn cash income. Other means of obtaining food and cash income include hunting, fishing, brick making and wild fruit gathering.

Figure 1: Karamoja Livelihood Zones



Source: FEWS NET Uganda and WFP Uganda

Humanitarian organizations, already stretched thin trying to meet the needs of the existing displaced population, are concerned about the increasing number of IDPs. With the current IDP numbers in the four districts, the World Food Programme (WFP) already projects a shortfall of more than 97,000 MT between March and December 2004 for its PRRO 10121.0, which accounts for 90 percent of its IDP assistance portfolio. Apart from food, many IDPs have inadequate access to shelter, health, sanitation and other services.

Normal dry conditions prevail in Karamoja Region (northeastern Uganda) and current agricultural activity is mainly limited to the wetter agricultural western belt (Figure 1). Following a relatively good harvest last season, a majority of households in the agricultural and agro-pastoral zones still maintain adequate grain stocks which will last them until June, when the next harvest will be nearly ready, assuming a timely and decent rainy season. Low food stocks are reported in the predominantly pastoral Pokot area on the eastern border with Kenya. The communities there are able to access grains from well-supplied markets with cash obtained from the sale of their livestock.

Overall, favorable livestock/cereal terms of trade support market exchanges in Karamoja. On average, a mature head of cattle fetches UShs 250,000 or US\$130 while shoats got for about UShs 27,500 or US\$14. Meanwhile, a kilogram of sorghum sells for between UShs 300 to 400 (US\$0.15 to \$0.20). On average, a household of six is able to buy up to 7 months worth of grain after the sale of one mature head of cattle. Apart from sale of livestock, households in Karamoja can turn to wage labor.

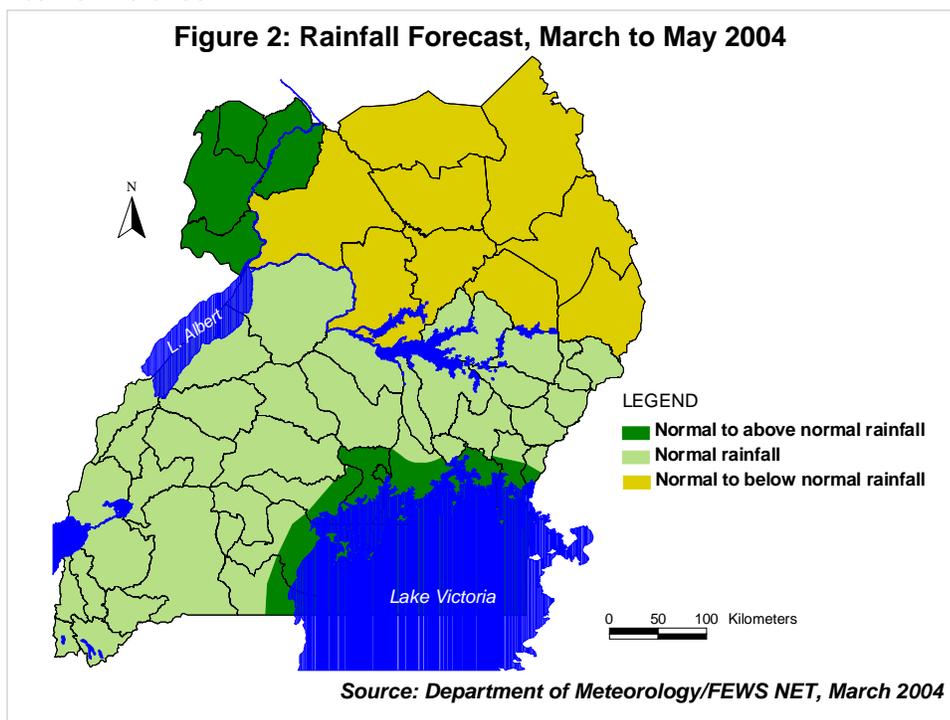
Availability of pastures and water is currently low, limiting access to livestock products for most household members. Nonetheless, livestock remain in dry season grazing areas within Karamoja with only a few reportedly crossing into

neighboring Lira, Katakwi, Kumi, Sironko and Kapchorwa Districts.

2.0 National Trends:

2.1 Agro-climatic Conditions: Weather conditions were consistent with the normal dry season pattern in February, with the exception of a rainy spell during the middle of the month in the Lake Victoria Basin districts. Since the beginning of March, steady rains have fallen in the central, eastern, and western parts of Uganda, and in the Lake Victoria Basin, marking the onset of the agricultural season in these areas.

In February, weather experts from the Greater Horn of Africa held a Climate Outlook Forum to determine likely projected rainfall for the March to May period. Following the meeting, the Uganda Department of Meteorology issued its medium range forecast, which suggests that the rainfall season is likely to begin on time in all regions of the country. Most parts of the country are likely to receive normal rainfall, with a slight probability of above normal rainfall for central Uganda, Lake Victoria Basin and northwestern Uganda. The northeastern and part of northern Uganda are more likely to receive normal to below normal rainfall (see Figure 2).



2.2 Crop Production and Conditions:

The onset of the rains in March encouraged farmers to begin field preparation and planting in many areas of Uganda, and district agricultural officers report intensified field activities. Crops being planted now include beans, cowpeas, Irish and sweet potatoes, and cereals (mainly maize).

Regardless of rains, many farmers in northern Uganda are unable to plant due to civil insecurity. In northeastern Uganda, dry conditions are preventing farmers from planting; they will begin opening land and sowing by late April to May, when the rainy season is expected to begin.

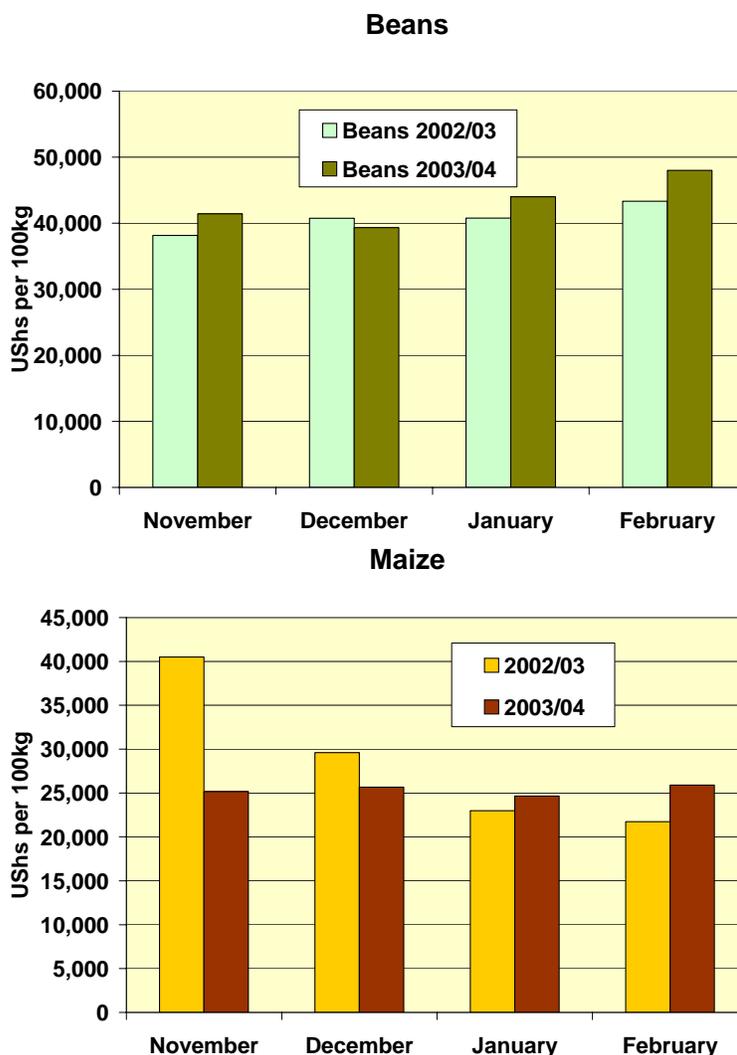
If the forecast holds, and rains perform as expected, FEWS NET does not foresee any hindrance to cultivation as farmers have access to their own stored and commercial seeds and other agricultural inputs.

3.0 Commodity Prices, Trade and Food Availability and Access

Market supplies of staple crops are reportedly normal. Commercial purchases of local beans and maize by traders and humanitarian organizations continues, fuelled by the demands of Uganda’s internal consumption and humanitarian assistance requirements, as well as food demands in East African and Great Lakes countries. Kenya and Tanzania provide the main export market for Ugandan commodities.

Figure 3 compares November-February prices in 2003/04 against 2002/03 and shows that in the last two months, bean and maize prices were marginally higher than at the same time last year. The higher prices this year are attributed to higher demand rather than lower supplies, with both Kenya and Tanzania increasing the pressure on exports. Even with this high demand, the rise in bean prices has been gradual, supporting traders’

Figure 3: Comparison between November - February 2002/3 and 2003/4 wholesale prices in Kampala



FEWS NET Uganda March 2004

Source: Market Information Service

reports of ample stocks and supplies of the commodity.

High November 2002 maize prices were attributed to low maize production in the first season of 2002; these high prices provided an incentive for farmers to grow more maize in the second season, which resulted in a significant price drop by February 2003. In comparison, 2003/04 maize prices have remained relatively stable over the last four months, attributed mainly to high production in both seasons of 2003.

FEWS NET expects maize and bean prices to rise in the coming months as stocks run low given continued high demands within the country and East African region.