

KENYA Food Security Outlook

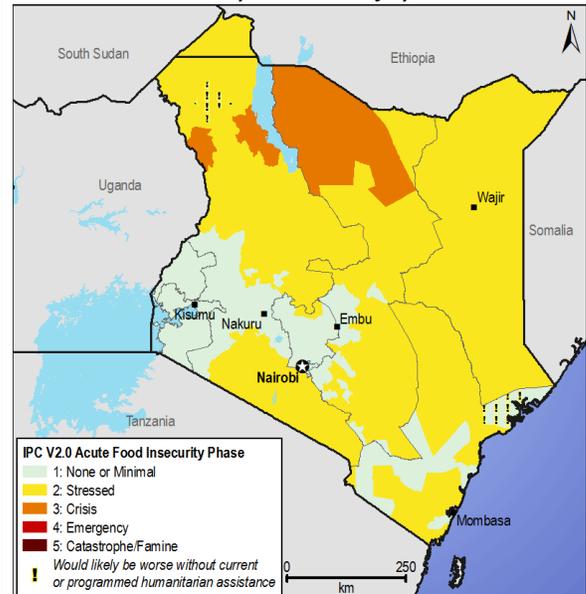
July to December 2014

Food security to deteriorate following below-average March to May long rains

KEY MESSAGES

- Generally, the below-average long rains resulted in below-average crop development in the high- and medium-potential areas in western Kenya and the Rift Valley. A below-average, long rains harvest is expected. Staple food prices are expected to remain unusually elevated through December. These areas will remain Minimal (IPC Phase 1) as sufficient income from crop sales and labor will still be available.
- In the southeastern, marginal, agricultural areas, food consumption will decrease through September. Households have limited income this year, and they need to purchase now while prices have remained high. The majority of households will remain Stressed (IPC Phase 2) but a few areas are likely to enter Crisis (IPC Phase 3) between now and September at the height of the lean season.
- In pastoral and agropastoral areas, rangeland conditions did not fully recover during the March to May long rains. Pasture, browse, and water are being depleted faster than usual, and the lean season is likely to start earlier than normal in July instead of August. Many households will remain Stressed (IPC Phase 2) through September while others likely will enter Crisis (IPC Phase 3). However, with the start of the short rains in October, many of these areas are likely to improve again to Stressed (IPC Phase 2).

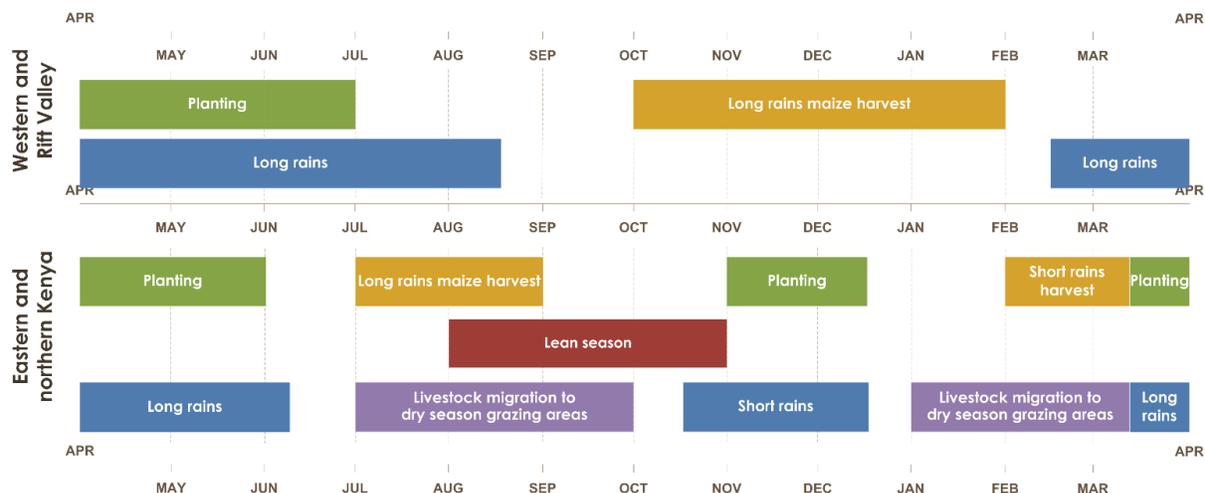
Current food security outcomes, July 2014



Source: FEWS NET

This map represents acute food insecurity outcomes relevant for emergency decision-making. It does not necessarily reflect chronic food insecurity. To learn more about this scale, click [here](#).

SEASONAL CALENDAR FOR A TYPICAL YEAR



Source: FEWS NET

NATIONAL OVERVIEW

Current Situation

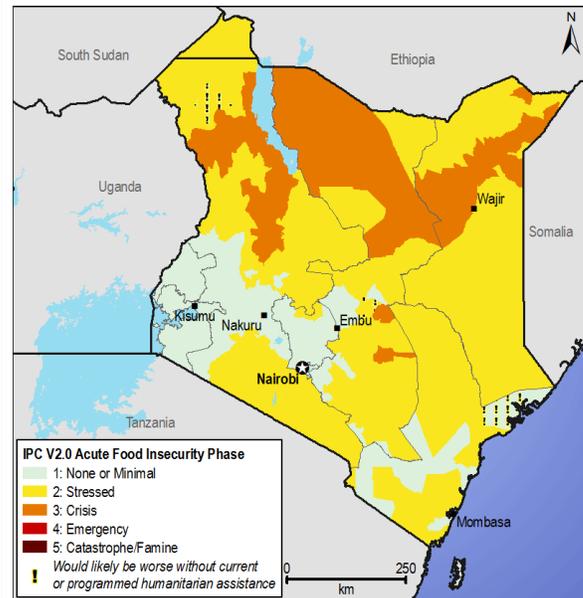
The cost of living increased between April and June with the overall inflation rising 15 percent. Inflation rose to a seven-month high in June to 7.39 percent, mainly fueled by the rising food, energy, and transport costs ([Kenya National Bureau of Statistics \(KNBS\) June report](#)). The Consumer Price Index (CPI) on the other hand rose to 149.91 in June from 148.20 in April. CPI's increase had been moderated by a decrease in the price of several food commodities, mainly fresh fruits and vegetables, which outweighed the price rises in other foods, mainly cereals. However, poor households are more dependent on the purchase of cereals such as maize than other food items in the basket. The increasing cost of living, against a relatively constant or declining household income, is likely to erode purchasing power.

Maize prices in several major urban markets marginally increased from May to June at a time of year when they are typically stable. Wholesale prices increased eight percent in Nairobi, and five percent in both Mombasa and Kisumu between May and June. These prices are 10 to 20 percent higher than 2013 and their respective five-year average prices. Prices are higher due to the tight supply that resulted from the below-average long rains harvest in late 2013, below-average 2013 short rains harvest early this year, and expectations of a below-average long rains harvest later this year. Maize prices remained more seasonally stable but at similar high levels in Eldoret.

The 2014 March to May long rains ceased by late May/early June in many parts of the country. This included areas where the rains typically stop around that time such as the the southeastern and coastal lowlands and the northern and southern pastoral areas. However, they also mostly stopped or reduced significantly in areas where the rains often continue through August, including the southern and northern Rift Valley, the western highlands, and the Lake Victoria Basin. The cumulative March to May long rains were generally below average over most parts of the country with localized exceptions where cumulative rainfall was closer to average (Figure 1). According to the [Kenya Meteorological Department \(KMD\)](#), the worst conditions were observed in the northwestern pastoral areas, parts of the central Rift Valley, and some areas of Narok and Kajiado Counties. In these areas, rainfall amounts were less than 50 percent of normal. Rainfall distribution over both space and time was also uneven and erratic over most parts of the country. During April when rains typically peak, many areas remained mostly dry due to the unanticipated and persistent deep low-pressure systems in the southwestern Indian Ocean, which inhibited moisture moving inland.

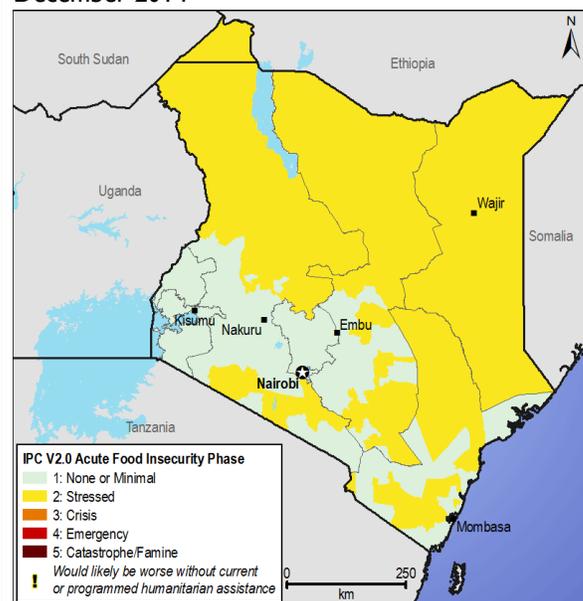
The below-average long rains resulted in below-average, slower than usual crop development and less recovery of rangeland conditions in the high potential areas, the central Rift Valley regions, the southeastern and coastal lowland areas, and the northwestern and northeastern pastoral and agropastoral areas. In pastoral areas, forage is deteriorating faster than normal, leading to early livestock migration including in Isiolo, Turkana, Mandera, Wajir, Samburu, Marsabit, and agropastoral areas

Projected food security outcomes, July to September 2014



Source: FEWS NET

Projected food security outcomes, October to December 2014



Source: FEWS NET

This map represents acute food insecurity outcomes relevant for emergency decision-making. It does not necessarily reflect chronic food insecurity. To learn more about this scale, click [here](#).

of Laikipia, West Pokot, Baringo, and Kajiado Counties. The deteriorating forage conditions have also resulted in poor or in some cases emaciated livestock body conditions. Trekking distances to water sources have increased. In the marginal agricultural areas and the agropastoral areas, much of the grain planted this season will not reach maturity. Households are currently relying on market purchases, but maize prices are high, and income is limited due to the limited availability of casual labor opportunities.

The tight food supply has resulted in prices remaining elevated or rising. With constant or declining income-earning opportunities, households' food access is constrained. However, various coping strategies are being used to increase income, so in many areas, households are still able to acquire their minimum dietary requirements. They remain Stressed (IPC Phase 2) in much of the country.

Assumptions

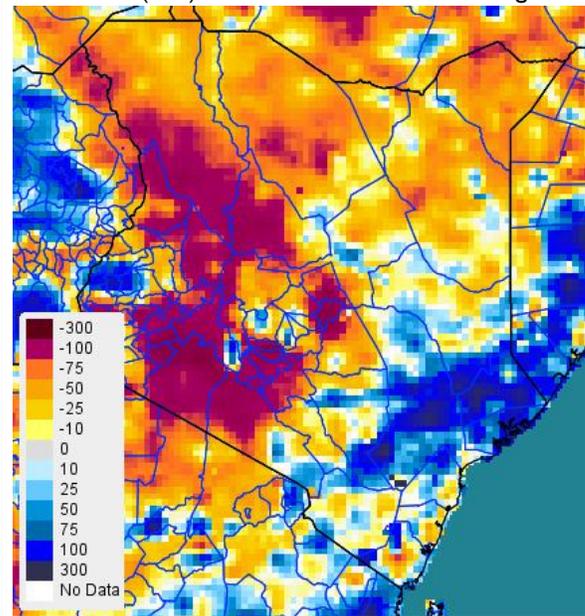
The following assumptions have been made at the national level:

- The June to September rains in the western highlands, the Lake Victoria Basin, parts of central Rift Valley including Nakuru and Nyahururu Counties, and the coastal strip are likely to be near-normal to below-normal in terms of cumulative amount.
- According to forecast from World Meteorological Organizations (WMO), there is a 65 percent probability of a moderate El Niño occurring between October and December. The El Niño coupled with a weak positive Indian Ocean Dipole (IOD) is anticipated to result in above-average cumulative October to December rainfall over eastern Kenya and average to above-average cumulative October to December rainfall in the northern pastoral areas during the short rains.
- With long rains crop production expected to be below average, price inflation and food price inflation are likely to increase through September as demand for food from markets increases and household stocks are depleted, further tightening supply. However, imports from Tanzania will moderate any sharp price increases in maize prices. Prices are expected to remain high or continue increasing albeit gradually, even after the start of the long rains harvest in October.

Most Likely Food Security Outcomes

Following the below-average long rains, the harvest is likely to be well below average, especially in the country's grain basket in the Rift Valley highlands. The Ministry of Agriculture projects that national long rains maize production will be up to 20 to 30 percent less than last year and the five-year average of 2.68 million metric tons (MMT). The likely below-average production is mainly due to crop losses and very low production in the grain basket in the Rift Valley due to the extended dry spell in April and May, which not only reduced germination but also lead to increased incidence of pests and plant diseases. This encouraged the spread of Maize Lethal Necrosis Disease (MLND) in Bomet, Narok, and Nyamira Counties. Carryover stocks from last season are quite low, and the Strategic Grain Reserve (SGR) only has 270,000 metric tons (MT) in it, which is less for this time of year than is typical. To increase supply, the government through the Ministry of Agriculture signed a Memorandum of Understanding (MoU) with the Tanzanian Government that will allow Kenyan private sector traders to import up to 180,000 metric tons (MT) of maize at a negotiated price and under import duty waivers between now and the end of August. These imports, coupled with the early harvest from the southern Rift Valley including in Bomet, Transmara, Nyamira, and Kericho Counties along with some production in the southeastern marginal areas and the Lake Victoria basin will ensure normal supply on markets at the national level through September. After September, the expected low national output at a time of high demand will likely result in unusual price increases in western Kenya and larger, urban markets.

Figure 1. March to May rainfall anomaly (RFE2) in millimeters (mm) from the 2002 to 2013 average



Source: [U.S. Geological Survey \(USGS\)FEWS NET](#)

With below-average household incomes, price increases for maize will result in reduced purchasing power for poor, urban consumers as well as poor households in the pastoral and marginal agricultural areas. In pastoral areas, the poor livestock body conditions make the livestock more susceptible to disease. The competition for limited rangeland resources between now and September increases the risk of conflict. Early migration in many areas may increase the school drop-out rates. Through September using various coping mechanisms, the majority of households across the country will be able to maintain enough food consumption to meet minimal dietary requirements, thus remaining largely in Stressed (IPC Phase 2). Exceptions will be in the high-and medium-potential areas that will be in Minimal (IPC Phase 1), and localized areas in the pastoral and marginal agricultural areas where households are likely to deteriorate to Crisis (IPC Phase 3) by September.

There are prospects of improved food security by November, especially in the marginal agricultural areas and the pastoral areas. With the start of the short rains in October, forecast to be above average, rangeland conditions will improve and land preparation and planting will increase in agricultural areas. While maize prices are expected to remain elevated due to tight supply, the start of the short rains season will lead to the seasonal increase in agricultural labor demand, increasing household incomes. Livestock production is also expected to improve, resulting in increased availability of milk and other livestock products. The majority of households, even in areas that had been at Crisis (IPC Phase 3) at the peak of the lean season, would be able to afford some food and are likely to then remain Stressed (IPC Phase 2) through at least December.

AREAS OF CONCERN

Southeastern Marginal Mixed Farming livelihood zone

Current Situation

In late 2013, the October to December short rains were well below average, which led to a delayed and late short rains harvest in February/March. The short rains season is the primary agricultural production season for this area, accounting for about 70 percent of total annual crop production in most years. However, the poor maize production has caused households to exhaust their stocks earlier in the year. Also, the smaller harvest required less agricultural labor, reducing a key source of income in the area. With fewer resources than usual and a poor start of the long rains in March/April, maize area planted was around 20 percent less than the long-term mean (LTM). Also, much of the crop has not developed normally due to dry spells. Having exhausted stocks long ago, households are purchasing food from markets, but with less income due to limited income-earning opportunities. Harvesting of short-cycle legumes has begun, providing a temporary but much needed source of food in June/July.

Despite having a structural deficit for maize and poor crop prospects, maize prices are still somewhat stable in Kitui and Makueni, but they have started increasing in other areas. Prices increased eight percent in Tharaka and Mwingi and 25 percent in Meru between May and June. The mostly stable maize prices are primarily due to continued imports from Tanzania. The tight supply of maize has contributed to prices remaining elevated, with current prices being 27 to 33 percent above their respective five-year averages in Kitui, Tharaka, and Meru North. With high market reliance due to exhausted household stocks, market access is highly constrained, as household income-earning opportunities are less available than usual due to low agricultural labor opportunities. However, the majority of households are still purchasing enough food to remain Stressed (IPC Phase 2).

Forage is deteriorating faster than normal due to below normal regeneration during the long rains. Distances to water points and grazing areas increased 10 to 20 percent between May and June in Kitui, Makueni, Meru North, and Tharaka Nithi Counties. The deteriorating rangeland conditions have resulted in deteriorating livestock body conditions and productivity. Livestock body conditions range from fair to poor. Consequently, livestock prices declined five to 10 percent in Kitui, Tharaka, Meru, and Mwingi between May and June. However, some demand for livestock remains as these prices remain 10 to 50 percent above their respective five-year averages. The recharging of surface water sources like pans and small dams was incomplete during the rains, with most areas reporting only 40 to 50 percent of usual water levels. Increasing scarcity of water has increased the cost of accessing it. As households spend more time accessing water, they have less time for other income-earning activities and often use less water, compromising hygiene and potentially food utilization.

The proportion of children 'at risk' of malnutrition, defined as a mid-upper arm circumference (MUAC) less than 135 millimeters (mm), declined from May to June. These have remained within normal ranges, as in June, they were less than 10 percent in Kitui, Makueni, Tharaka, Mwingi, and Embu. In general, the MUAC-estimated 'at risk' of malnutrition rates remain below their five-year averages. However, in Meru North, up to 21 percent of children were 'at risk' of malnutrition in June, a much higher level and very different from the rest of the livelihood zone. Continued nutrition support programs and relatively stable household food access over the past year have contributed to stability in most areas.

Assumptions

In addition to the national assumptions made above, the following additional assumptions have been made for the Southeastern Marginal, Mixed Farming livelihood zone:

- Casual wage labor opportunities and wages are expected to decline even more than seasonally through September due to limited agricultural labor demand. However, labor demand for land preparation and planting will start to increase towards the end of September, triggered by the forecast above-average short rains.
- A below average July/August maize harvest is expected in this area.
- Remittances from permanent and semi-permanent urban migrants are expected to increase through September, as relatives in urban areas help their rural relatives cope with the shock of two consecutive, below-average crop production.
- Intensification of certain income-earning and income-preserving strategies as coping mechanisms is likely, including charcoal burning, sand harvesting, petty trade, credit purchases, and switching to less preferred foods through September.
- Water shortages are likely to intensify from July until the start of the short rains in October.
- Supplementary nutrition programs are expected to continue through at least December.

Most Likely Food Security Outcomes

Household food access and consumption is expected to wane through September. The long rains harvest in July and August will be well below average and will not be a significant source of food for many households. With already high market dependence, continued high but mostly stable food prices, little labor income due to there being very few casual wage labor opportunities, households will need to intensify coping, primarily by intensifying other income-earning opportunities. Households will increase labor outmigration mainly to urban areas, increase their reliance on remittances, purchase food on credit, and switch to less expensive and less preferred foods. Though most households have few livestock, livestock sales are likely to increase significantly to finance short rains land preparation and planting as well as meeting other cash needs for food and non-food purchases. Through various coping strategies, households will still be able to sustain some food access. Child nutrition cases are set to track household food access and consumption, deteriorating through September, but they are not expected to increase beyond the normal range, as continued supplementary nutrition programs should prevent the worst outcomes from occurring. Most areas will remain Stressed (IPC Phase 2). However, very poor households in a few areas such as parts of Kitui South and Mwingi will have the lean season start early in July, and are likely to enter Crisis (IPC Phase 3) by September.

With the expected El Niño, the short rains are likely to have average to above-average amounts and will likely result in above-average casual, agricultural labor demand. Casual wage labor opportunities are likely to increase in availability from late September onwards as land preparation intensifies before the short rains. This will boost household incomes. With the rains expected to be timely, maturity and harvesting of short-cycle crops will improve food access and consumption through December. Livestock kidding, lambing, and calving are expected to increase milk production, further increasing household food access. The nutritional status of children is likely to improve from November to December due to the increased availability of milk and of short-cycle crops like beans, which are harvested as early as November. Staple food prices are expected to remain at their elevated levels but be mostly stable through December. Households that had been in Crisis (IPC Phase 3) will begin to be able to purchase or produce enough of their own food. The majority of household will remain

Stressed (IPC Phase 2), but there will still be improved food security in late November through December, with the possibility of some areas moving into Minimal (IPC Phase 1).

Pastoral livelihood zones

Current Situation

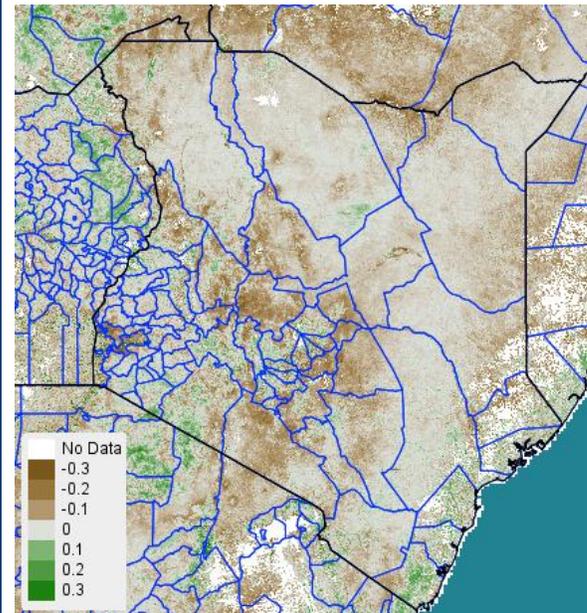
The March to May long rains were below average, 50 to 80 percent of the normal in most pastoral areas, which was the second, consecutive below-average rainy season. As a result, the seasonal improvement in rangeland conditions, such as water, pasture, and browse availability, was modest. Currently, pasture, browse, and water availability are fair to poor, and they are deteriorating more rapidly than usual. This is especially the case in Turkana, Marsabit, Wajir, Mandera, Isiolo, and Samburu (Figure 2). With these deteriorating rangeland conditions, faster than usual deterioration of livestock body conditions and productivity has been observed. Completely exhausted pasture and browse are reported in some purely pastoral areas in Mandera, Turkana, Isiolo, and Marsabit Counties. Earlier than normal migration of livestock from the wet season to dry season grazing areas have been reported across all the livelihood zones, though in some places like Turkana, livestock remained in their dry-season grazing areas. Livestock are clustered around areas with good grazing resources. Some pastoralists have trekked much further distances than usual. For example, in Turkana and Wajir, they have taken their livestock into the Karamoja region in northeastern Uganda and Lower Juba Region in southern Somalia, respectively. Trekking distances are up to 15 kilometers, which is abnormally far this early in the dry season. The deteriorating livestock body conditions have contributed to reduced milk production, which has declined by up to 35 percent between May and June.

Livestock prices have remained constant or decreased up to 10 percent between May and June, primarily due to poor body conditions. Livestock prices in June were 10 to 20 percent above their respective five-year averages in Marsabit and Garissa, and 40 to 70 percent above their five-year averages in Lodwar, Ijara, Moyale, and Samburu. Cereal prices, on the other hand, increased in June. Maize prices increased up to 10 percent in Lodwar and Marsabit, while remaining fairly stable in Ijara, Samburu, Wajir, Mandera, Garissa, and Isiolo. These prices remained 10 to 50 percent higher than their respective five-year averages. As a result, pastoralists' terms of trade have declined up to 15 percent from May to June, eroding household purchasing power. Livestock sales contribute up to 60 percent of household income.

Malnutrition, as measured by the proportion of children 'at risk' of malnutrition, have been increasing across pastoral areas, especially in Isiolo, Turkana, Marsabit, Samburu, and Mandera Counties. In June, most areas remained below their five-year averages, possibly due to the supplementary nutrition programs that are being conducted in these regions. However, in Turkana, 'at risk' rates have remained higher than average, by margins of up to 16 percent. Nutrition surveys undertaken by the Ministry of Health (MOH) and partners in May and June in Turkana, Samburu, Mandera, Marsabit, Wajir, and Garissa found global acute malnutrition (GAM) rates being **Critical** (15 to 20 percent) to **Very Critical** (greater than 20 percent).

The majority of households in pastoral areas remained Stressed (IPC Phase 2). However, some localized areas, that have had two consecutive severe rainfall deficits, compounded by recent insecurity, which disrupted their livelihood activities, and some new areas, are less food secure. Though insecurity has declined in many areas, households have yet to recover fully. These areas include parts of Loima, Turkana Central, Kalokol, and Kerio in Turkana and North Horr, Maikona, and Loiyangalani Sub-Counties in Marsabit, which remain in Crisis (IPC Phase 3).

Figure 2. July 11 to 20, 2014 eMODIS Normalized Difference Vegetation Index (NDVI) anomaly from 2001 to 2010 mean



Source: [USGS/FEWS NET](#)

Assumptions

In addition to the national assumptions above, the following assumptions have been made about pastoral livelihood zones:

- During the short rains, the El Niño is likely to increase chances of flash floods in localized areas. Some flash floods are likely to displace households, result in livestock mortality through drowning and disease, and increase the likelihood of water- and vector-borne diseases in the flood-prone pastoral areas.
- Household income will most likely track livestock prices, decreasing through October with deteriorating body conditions, and thereafter increasing from November as livestock body conditions improve due to the improved rangeland conditions.
- Intensification of certain income-earning activities as coping strategies will be common between now and October. This includes increased charcoal burning and petty trade, especially in August.
- Following the below-average long rains, the below-average harvest in agropastoral and nearby agricultural areas will require less outside labor. With low demand, casual agricultural labor wages are likely to decline significantly, as labor supply surpasses demand through September.
- The national government, county governments, and humanitarian agencies are expected to increase the scale of their interventions in pastoral areas.

Most Likely Food Security Outcomes

Rangeland conditions are already deteriorating faster than usual. The lean season has started early in July with households already on a less diverse diet with less milk. Livestock body conditions and health are expected to continue to deteriorate faster than usual. Livestock prices are expected to continue falling until the start of the short rains in October. With declining livestock prices and the seasonal increase in staple food prices, household purchasing power will be further eroded. The accompanying decline in milk production and consumption is likely to lead to increasing malnutrition through September. Food security is expected to remain Stressed (IPC Phase 2) in most areas.

Insecurity and associated disruptions to market access and income-earning opportunities are likely to compound the effects of the dry season in parts of Wajir, Mandera, Turkana, and Samburu. Households in some areas of Marsabit, Turkana, Wajir, and Mandera are likely to fall into Crisis (IPC Phase 3) by September. Supply will remain tight in pastoral areas as transaction costs tend to be high, distances to areas of harvest tend to be long, and national supply appears to be tight this year. Maize prices are likely to remain near their lean season levels for longer than in other areas of the country.

For October to December, the El Niño will likely result in normal-to-above normal cumulative rainfall amounts in these areas. Grazing resources are likely to increase markedly, and livestock body conditions and health are also likely to improve. Livestock prices are expected to start improving from November as body conditions recover. Kidding, calving, and lambing is expected to start at the onset of the short rains, which will increase livestock productivity including milk production, leading to additional milk consumption. With households' income, food access, and consumption is expected to track seasonal improvement of livestock and livestock prices, household food security is expected to start improving by November. Though staple food prices will remain elevated due to tight supplies, the increased household income from livestock sales, petty trade, and charcoal will enable food purchases. Food security will remain Stressed (IPC Phase 2) for the majority of households in these areas, and in the areas where Crisis (IPC Phase 3) occurred will improve to Stressed (IPC Phase 2).

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
Southeast Marginal Mixed Farming livelihood zone	Significant spikes in maize prices	Severely constrained household food access
Southeast Marginal Mixed Farming livelihood zone	Below-average October to December 2014 short rains	With the third consecutive below-average harvest season, agricultural labor demand will be weak, leading to low wages and increased food insecurity, and eventually, less national supply of maize by February/March 2015.
Southeast Marginal Mixed Farming livelihood zone	Trade restriction between Kenya and Tanzania and/or Uganda	This would restrict maize imports, resulting in constrained supply on the market. Significant spikes in food prices would be likely, severely limiting many poor households' ability to make market purchases.
Pastoral livelihood zones	Widespread flooding during the October to December short rains	Flooding leading to displacement of households, livestock mortalities through drowning and disease such as the Rift Valley Fever, and outbreak of water- and vector-borne diseases. This would constrain household food access and consumption both in areas with floods and in areas where the displaced come and place additional demands on local resources.
Pastoral livelihood zones	Below-average October to December 2014 short rains	Poor recovery of rangeland conditions would lead to further deterioration of livestock body conditions, health, and values. The likelihood of conflict increases as communities compete for grazing resources. Food insecurity would likely increase in many areas.
Pastoral livelihood zones	Intensification and continuation of conflicts	Reduced market access, loss of assets, and displacement

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 six months. Learn more [here](#).