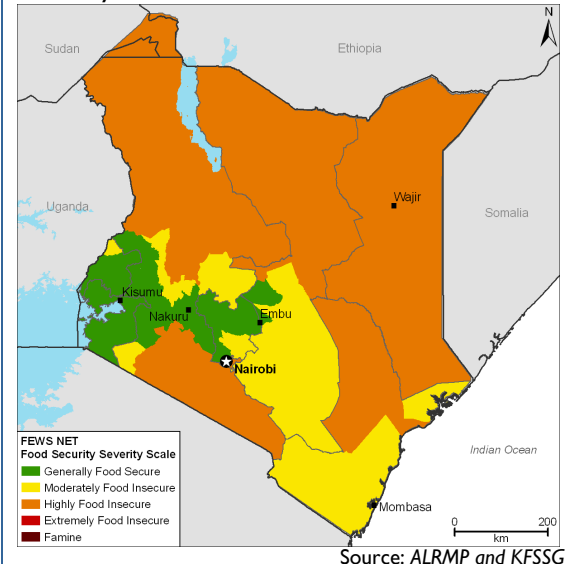


KENYA Food Security Update

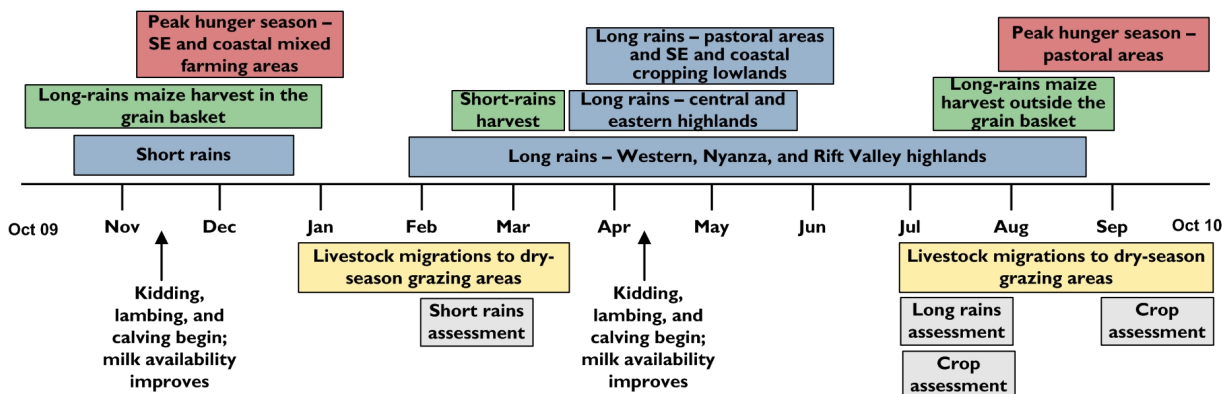
February 2010

- The 2009/10 short rains have ended after having continued uncharacteristically into mid-January, resulting in improved household food security prospects for drought-affected pastoralists and marginal agricultural farmers.
- A favorable national short rains harvest is anticipated, closely comparable to the output in the 1997/98 short-rains season - both attributed to good rains, consequences of respective El Niño events.
- However, while maize prices are declining in some harvesting epicenters, the price of the staple remains up to 100 percent above average levels, to the detriment of net buyers such as pastoralists and urban consumers.
- Improvements in the food pipeline have allowed relief food distributions to resume for an estimated 3.8 million persons, including blanket supplementary feeding in five pastoral districts (Marsabit, Samburu, Mandera, Wajir, and Turkana) that consistently report high rates of child malnutrition. Nevertheless, complementary non-food interventions in the health and nutrition, agriculture, livestock, and water and sanitation sectors have fallen short of requirements, limiting the overall impact of the interventions in mitigating food insecurity.

Figure 1. Estimated food security conditions, February 2010



Seasonal calendar and critical events



Source: FEWS NET

Food security overview

Resurgence of rains in December 2009, through mid-January, has renewed prospects of a generally favorable short-rains season in key areas of concern, including most of the southeastern and coastal lowlands as well as the northern, eastern and southern pastoral lowlands. The food security status of drought-affected pastoralists and marginal agricultural farm households in particular, points to significant improvements from the present through June, at least. However, there are continuing areas of concern, including parts of western Mandera, northwestern Wajir, eastern Marsabit, northwestern

FEWS NET Kenya
Tel: 3861475/6/9
Nancy Mutunga
nmutunga@few.net

WFP/VAM
Tel: 7624073
Allan Kute
Allan.kute@wfp.org

ALRMP
Tel: 227496
James Oduor
j.oduor@aridland.go.ke

Ministry of Agriculture
Tel: 2713901
Abner Ingosi
abneringosi@yahoo.com

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Isiolo, and southeastern Samburu districts. In these areas, prevailing high temperatures that persisted through the extended dry spell in November, following an early cessation of the short-rains season, are causing rapid deterioration of pasture and browse and declines in water availability. However, unlike in previous seasons, pastoralists have additional migration options because most of the adjacent neighboring areas and districts received good rains, particularly after the heavy rains that started during the last week of December and continued through mid-January. Outside of these areas of concern, most other pastoralists are likely to have sufficient grazing resources through the long-rains season, if rains are normal as anticipated, consolidating the initialization of the recovery process. Household food security is showing improvements as availability of milk increases while rates of child malnutrition have declined by margins ranging 5-15 percent in Garissa, Kajiado, Mandera, Samburu, Tana River, and Wajir pastoral districts, over the past month. While livestock prices have also increased by margins of up to 20 percent, improvements in terms of trade are moderated by sustained higher than average cereal prices.

Most areas of the southeastern and coastal lowlands are anticipated to experience an extended period of major improvements in household food security, through 2010, if the long rains are near normal to above normal, as initial forecasts would suggest. The effects of several poor seasons worsened by exceptionally high food prices will nevertheless slow down the recovery of households that may use a significant proportion of their short rains output paying debts, mostly school fees, rather than re-investing in productive activities. Parts of the southeastern and coastal lowlands in Kitui, Makueni, Mwingi, Kilifi and Malindi remain of substantial concern, due to relatively erratic rains that have already caused marked yield losses. While improved food supply in surrounding areas and markets will cause a significant decline in food prices, purchasing capacities of farm households in affected areas have eroded and their food insecurity is likely to remain heightened.

Pastoral food security

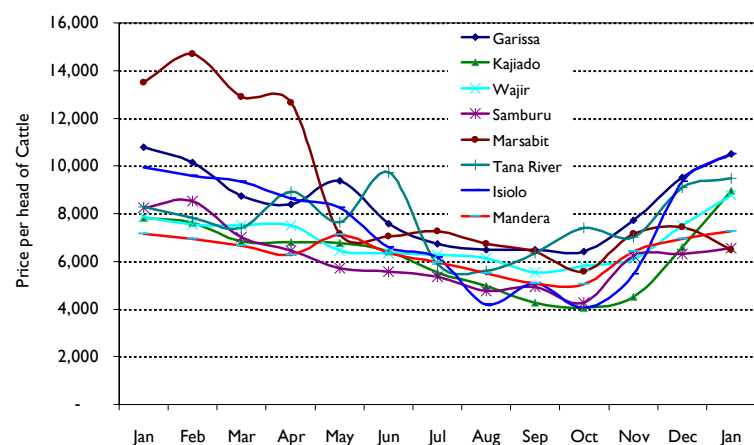
The Arid Lands Resource Management Project (ALRMP) has reported significant improvements among pastoral livelihoods, after a prolonged period of up to five drought seasons, in some instances. Nevertheless, parts of the pastoral livelihood area have experienced an overall poor or mediocre season and environmental stress is already evident. The areas include parts of western Mandera, northwestern Wajir, eastern Marsabit, northern Garissa, southern Tana River, northwestern Isiolo and southeastern Samburu districts.

However, the ALRMP has reported that substantial improvements in pasture, browse and water availability, outside the areas listed above, have resulted in marked improvements in key pastoral food security indicators. The reduction in trekking distances that range between three to five kilometers in several areas has facilitated the onset of the recovery process as rates of lambing, kidding and calving begin to increase and household access to milk is stabilized. For example milk availability at the household level increased by eight percent in December and by a further 12 percent in January in Turkana. In response, rates of child malnutrition have declined in many pastoral districts by margins ranging between 5-12 percent, as elaborated in the nutrition section.

However, trekking distances are at least 12-15 kilometers in the flagged areas and are increasing, leaving sedentary household members without sufficient milk and other livestock products.

Livestock prices are rising across many districts in the pastoral livelihood area including Garissa, Isiolo, Kajiado, Mandera, Samburu, Tana River and Wajir, by margins ranging between 5-15 percent in January as compared to December (Figure 2). The prices are also a little higher than respective January averages in some markets and yet lower than January averages in others. However, the beneficial impacts of the rise in livestock prices are moderated by above normal cereal prices which

Figure 2. Livestock Price Trends across Pastoral Districts



Source: ALRMP

have sustained the downward pressure on terms of trade, which are well below average levels. Figure 3 illustrates the quantity of cereal that a household was able to purchase by selling one goat in January 2010 compared to respective January averages. It is anticipated that maize prices may decline marginally due to a combination of increased supplies from the short rains harvest in the southeastern lowlands coupled with an improvement in the food pipeline. However, the decline would likely be limited and short-lived due to the relatively low quantities traded and the imminent downscaling of the relief operation.

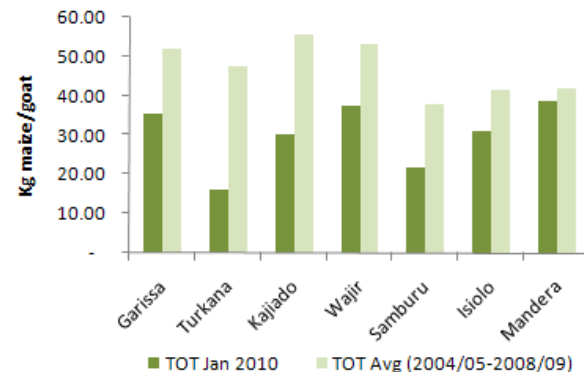
Prospects for consolidating the recovery of pastoral food security are dependent on normal long rains in 2010, particularly in areas that have experienced a mediocre or a poor short-rain season. Normal long rains would strengthen the recovery process because a significant proportion of pastoralists remain in wet-season grazing areas, after rains extended into January. In addition, a reduction in conflict incidents has widened grazing areas and access to markets, which is likely to facilitate improved productivities, in areas that were formerly inaccessible. However, impacts of the prolonged conflict, prior to early 2010, including decimation of livelihoods for some pastoralists in Samburu, Marsabit, Turkana and Isiolo district, are expected to set back the recovery process.

Marginal agricultural lowlands of the southeast and coast

The southeastern marginal agricultural lowlands, comprising most areas of Kitui, Machakos, Makueni, Mbeere, Meru North, Mwingi, Tharaka, and Taita Taveta, are anticipating an overall near normal to above normal short rains harvest. The importance of the short rains is emphasized by its overwhelming contribution to annual output in these areas, accounting for at least 70 percent of household food supply. Exceptions are the areas along the coastal strip, which are predominantly long rains-dependent. Parts of the coastal lowlands outside the coastal strip in Kilifi, Kwale, and Malindi may record a below-normal harvest. The failure in succession of at least four previous seasons has also generated significant interest among food security analysts regarding the progression and likely positive outcome of the current season. Maize output is expected to be at least 300,000 MT in both the southeastern and coastal lowlands, nearly 40 percent higher than production in a normal year. In addition to the uncharacteristic resurgence of rains from late December through mid-January, expected favorable production is attributed to supply of relief seed and fertilizers to drought-affected households, a 20 percent increase in area planted, and a 40 percent decline in the cost of fertilizers. The 2010 short rains output could have been more favorable except for the long dry spell that started toward the end of November and continued through the third week of December, causing crop failure or substantially reducing output in parts of Kitui, Makueni, Mwingi, Kilifi and Malindi districts. The crop that was subsequently re-planted is unlikely to mature as it is at the tasselling stage, and rains have ended for the most part.

Anticipated improvements in household food security should be sustained through most of 2010 especially if the long rains are normal. Crucially, such improvements will be determined to a large extent by farmers opting to store their substantial surpluses at an appropriate time, when prices are high, so as to build their purchasing capacities. However, the reality is that many households are indebted and the common practice of disposing their output at floor prices, just after harvest, is probable. Unfortunately the farmers may subsequently buy back cereals and pulses at multiples of their selling price a few months after harvest, eroding potential food security gains from a good 2010 harvest season. Although livestock prices are up to 20 percent higher than average, farmers traditionally do not sell livestock when their condition is favorable especially since pasture, browse and water are in close proximity to homesteads. Nevertheless, marked improvements in household food security are occurring as harvesting of pulses is completed while maize harvesting is beginning. Some of the improvement is manifested in a reversal in increasing rates of child malnutrition that characterized the latter part of 2009 in most marginal agricultural districts. MUAC rates from ALRMP surveillance data have declined by margins ranging from 5-25 percent in Makueni, Meru North, Mwingi, Tharaka, Kilifi, Malindi, and Lamu districts, in January 2010 as compared to December 2009, just prior to the resumption of the rains.

Figure 3. Terms of Trade, Goats to Cereal, across Pastoral Districts



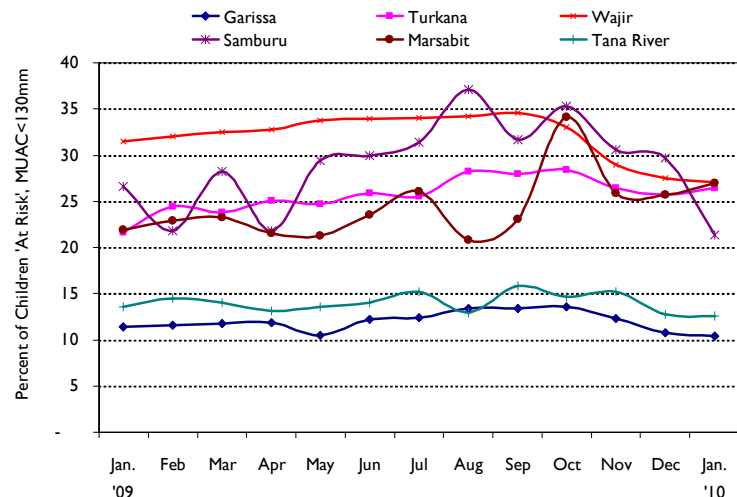
Source: ALRMP

Nutrition

Rates of child malnutrition, that is, the 'At Risk' rates as measured using the middle upper arm circumference (MUAC), from ALRMP surveillance data, point to gradual improvements in the nutritional status of children in 2010 compared to previous months. The improvements signal a favorable upturn in household food security, after a sustained period of constrained household food availability, particularly among pastoralists and marginal agricultural farm households. The improvements are attributed to increased availability of milk and livestock products, as well as recovery of livestock prices that are positively impacting pastoral terms of trade. A significant proportion of pastoralists in the north, south and northwest have remained in or close to wet-season grazing areas because of the extension of rains into mid-January, thus stabilizing milk availability for sedentary household members.

Figure 4 shows a decline in rates of child malnutrition ranging from 10-20 percent in January 2010 compared to December 2009, in Mandera, Wajir, Tana River, Samburu, Garissa, Kajiado, and Turkana districts. However, rates of child malnutrition have remained high during a comparable period in Marsabit and Isiolo districts, attributed to a relatively short season which started early, in October, but also ended early, during the third week of November, in substantial areas of those districts. Subsequently, grazing resources, pasture, browse and water depleted much faster than normal promoting early migrations, leaving sedentary household members without sufficient milk and livestock products. However, if the long rains are normal, pastoralists will begin returning to wet-season grazing areas in early April and new birthings should result in improved milk availability to children, especially. The on-going supplementary feeding programme in all pastoral, southeastern and coastal marginal agricultural lowlands coupled with blanket supplementary feeding in Turkana, Marsabit, Wajir, Moyale, Mandera, and Wajir have also contributed to the downward trend in rates of child malnutrition.

Figure 4. Trends in child malnutrition in pastoral districts



Source: ALRMP

On-going interventions

The World Food Program's (WFP) Protracted Relief and Recovery Operations (PRRO) was able to reach 1.1 million out of the 3.8 million food insecure population during the December food distribution that ended in mid-January. A total of 9,700 MT of assorted food commodities were distributed. Distributions during the January cycle are targeting provisions of food to the 3.8 million persons at 50 percent of the ration. The reduction in ration has been necessitated by continued food pipeline constraints, as a result of late overseas arrivals of food, coupled with under-funding. The situation resulted in missed distributions in some districts in October and November. A total of 26,000 MT of food commodities consisting of cereals, pulses, and vegetable oil are expected to be distributed in February. WFP is mobilizing resources for local and regional purchase to bridge the gaps.

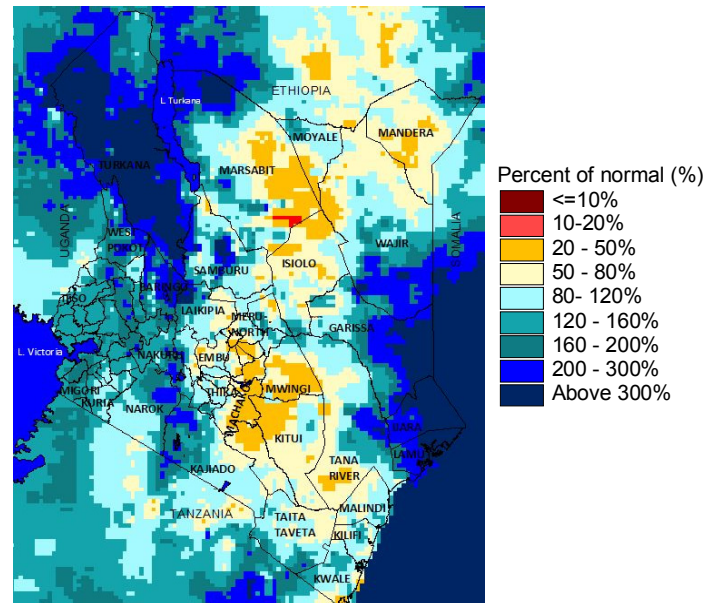
Targeted supplementary feeding programmes continue to be implemented in pastoral and marginal agricultural districts targeting 120,000 moderately malnourished pregnant and lactating women and children less than five years of age. Currently, the programme is reaching a total of 96,333 beneficiaries. The blanket supplementary feeding programme has also been initiated in the five arid districts of Marsabit, Samburu, Mandera, Wajir and Turkana. The blanket supplementary feeding programme will be implemented for four months, starting in January 2010, aimed at preventing a further decline in malnutrition in these five districts during the hunger season that occurs just before the start of the long rains. The programme includes all pregnant and lactating women, and children less than five years in the five districts. Distributions started in mid-January 2010, and a total of 450,000 beneficiaries are planned to benefit from this programme.

Seasonal Progress

Short rains end across the country

Heavy rains in the southeastern lowlands and coastal strip and the southern, northern and northwestern rangelands continued uncharacteristically from the last week of December into January. Rains ceased in mid-January, signaling the end of the 2009/2010 short rains. The late rains reversed what could have resulted in another poor or failed season in some areas, after a lengthy dry spell that started toward the end of November. However, not all areas of the country received favorable cumulative rains during the short rains period. Figure 5 is an illustration of rainfall anomalies through the entire short rains. Significant areas of Marsabit, Wajir, Tana River, Isiolo and parts of the southeastern and coastal marginal agricultural lowlands reported lower than average cumulative rains during the short-rains season. The areas shaded yellow and orange are the main areas that need to be carefully monitored, particularly during the upcoming long-rains season, whose onset ranges from late February to early April. Although most pastoralists have migrated from drought-hit areas, a good long-rains season would facilitate migration of pastoralists back to wet-season grazing areas and decelerate depletion of pasture, browse and water in areas where migrating livestock have clustered.

Figure 5. Short rains anomalies: October 1, 2009–January 20, 2010



Source: FEWS NET-USGS

Heavy rains caused flooding in localized areas of the pastoral districts of Turkana, West Pokot, Baringo, Isiolo, Kajiado and Narok; parts of the grain basket including Kericho and Nakuru districts; localized areas of the southeastern marginal agricultural areas of Kitui and Makueni; and the Lake region districts of Nyando, Kisumu, Siaya, and Rachuonyo. Households reported significant losses including loss of crop, livestock, homes, and in some unfortunate instances, lives. While emergency interventions have mitigated immediate food and non-food needs, many of the livelihoods remain vulnerable to food insecurity and will require asset-building interventions to restore their productive capacities.

National maize production progress

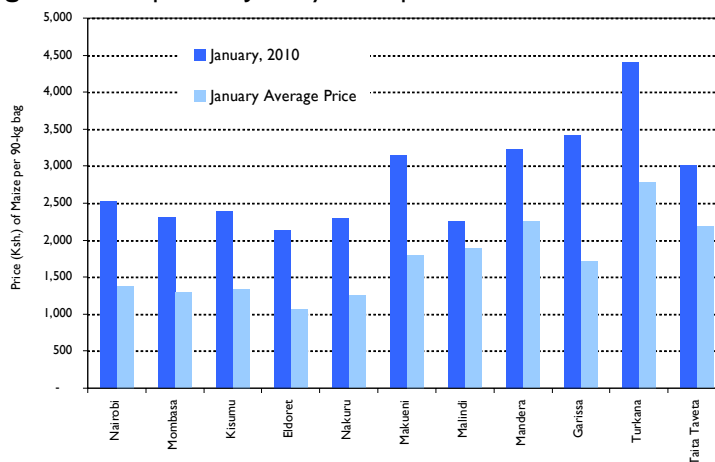
The 2009/10 production season is nearing its conclusion with the short rains crop harvest that is expected to end by early March. The generally favorable short rains output will have a major positive impact on households in short rains growing areas including the Nyanza, central, and eastern highlands, as well as the southeastern and coastal lowlands. However, it will have a measured impact in mitigating the national long rains production shortfall. Short rains maize output contributes 15 percent to overall national maize output, since the long rains is the predominant cropping season in major surplus areas. Overall national output for the 2009/10 production season is estimated to be 2.35 million MT of maize – 1.83 million MT from the long rains crop and 540,000 MT from the short rains crop. While the overall output compares unfavorably with the national short-term average of about 3.0 million MT, the short rains harvest in 2010 will be the highest achieved since the El Niño harvest of February-March, 1998. Total national supply, including stocks held by farmers, traders, millers, and the National Cereals and Produce Board (NCPB), are expected to last through May 2010, assuming that no significant imports will have been brought into the country during that period. The GoK is in the process of renewing the waiver on duties levied on maize imports that expired in December to facilitate imports that are intended to cover the probable shortfall in domestic supply after May.

Markets and trade

While prices of short-cycle crops and livestock output, including vegetables, potatoes, and milk, have significantly declined, prices of cereals and pulses remain far higher than respective seasonal averages. Prices have remained higher than average levels since December 2007, attributed to a combination of a succession of mediocre production seasons in the grain basket; production disruptions after the post-election crisis; high global food prices; export bans by Tanzania that have constrained the supply into Kenya; high input prices in 2008; and heightened purchase prices that were set by the GoK and revised upward several times in 2009. Reductions in the price of maize and beans are confined largely to markets that are either within the harvesting epicenters or are close to ports of entry either cross border or through the port of Mombasa. The price of maize has declined by margins ranging between 4-13 percent in Kilifi, Kwale, Malindi, Mombasa, Mwingi, Nairobi, and Taita Taveta. However, the price of maize remains between 50-100 percent above the 5-year average during January in most reference markets (Figure 6). While the high maize prices are beneficial to producers, they are limiting the recovery of households that are dependent on markets in purchasing cereals, mostly pastoralists and urban households. The NCPB has reduced its purchase price of maize from Ksh. 2,300 to Ksh. 2,000 because of increased domestic supply derived from both the long and short rains harvests, which peaked from November 2009 and are expected to continue into early March 2010. The reduction in NCPB's purchase price, after a succession of four increases during 2009, could cause a reduction in maize prices since traders are likely to reduce their own asking prices.

Farmers in the high potential highlands of the Rift Valley, Central, Western, and Nyanza provinces are grappling with a reduction in income from milk, due to a glut in supply. The New Kenya Co-operative Creameries (KCC), the major buyer of milk, has reduced its purchase price from farmers by close to 30 percent because farmers have over supplied it with milk. The New KCC is receiving an estimated 580,000 litres of milk on a daily basis as compared to the normal 400,000 litres, an output which is also 130,000 litres more than its handling capacity. Inability to handle the supply is compounded by the breakdown of machines, in effect lowering productive capacities. The supply glut has been attributed principally to a marked improvement in grazing resources, following normal to above normal rains in key high potential dairy-producing areas.

Figure 6. Comparative January maize prices across livelihood



Source: MoA and ALRMP

Conclusion

The food security prognosis for most of the drought-affected pastoralists and marginal agricultural farm households is favorable, in the event that long rains are normal. Improvements in livestock productivity, including an increase in milk output, favorable livestock prices, and a reduction in livestock diseases, are beginning to manifest in reduced rates of child malnutrition. Although incidents of conflict have reduced markedly, pastoralists will require a much longer time to recover from the impacts of drought combined with two years of sustained conflict. Improvements in pastoral food security are significant but will require a normal long-rains season to consolidate the beginning of the recovery process. Improved food availability at the household level in many areas of the marginal agricultural southeastern and coastal lowlands is complemented by overall strong market prices, providing an opportunity for farmers to improve household incomes as long as farm output is sold at competitive prices. Nevertheless, there are areas of continuing concern in both pastoral and marginal agricultural areas where production prospects are poor. The food security status for households across livelihood areas, particularly those that are still suffering the impacts of drought, will be clarified after the outcome of the long rains assessments in March.